Oracle® Hospitality Suite8
Setup Miscellaneous User Manual
Release 8.9

July 2015

Contents

Preface

Audience

This user manual is intended for system users and system administrators.

Customer Support

To contact Oracle Customer Support, access My Oracle Support at the following URL:

https://support.oracle.com

When contacting Customer Support, please provide the following:

- Product version and program/module name
- Functional and technical description of the problem (include business impact)
- Detailed step-by-step instructions to re-create
- Exact error message received
- Screen shots of each step you take

Documentation

Oracle Hospitality product documentation is available on the Oracle Help Center at http://docs.oracle.com

Revision History

Date	Description of Change
July, 2005	• 8.5.0.0 - First Issue Small Business Edition
May, 2008	• 8.7 - Updated for Version 8.7
June, 2008	• 8.7.3.1 - Updated for Version 8.7.3.1
May, 2009	• 8.8 - Updates for Version 8.8
Sept, 2010	• 8.8 - Updates for Oracle 11gR1
Jan, 2012	• 8.9 - Updated for Version 8.9
Nov, 2012	• 8.9 - New cover page
July, 2015	• 8.9 – Oracle template applied

1 Form Customization

This option allows custom screen painting and modification of the Fidelio Suite8 screens; it is intended to be used by installers and expert users only. You may add, delete and move fields as well as specify various conditions. The edited screen is saved as a user customized form and can be linked to users or user groups. Screens can be exported and imported, and this option may be used to recover original screens. Pre-defined forms cannot be changed.
The following screens may be customized:

Reservation

- Reservation edit main tab
- Alternative reservation editor

Company Profile

- Company profile edit main tab
- Company profile edit second tab

Individual Profile

- Individual profile edit main tab
- Individual profile edit second tab
- Small Business Edition individual profile edit main tab

Booking

- Booking edit
- Quick Booking edit
- Booking event edit

> **Note:** The Booking Master Edit, Booking Event Edit and Quick Booking Edit screens are only available if the Conference and Catering Management sub-licence is activated.

The following screen painting commands are available:

- Move
- Resize
- Delete
- Inserting standard components
- Inserting user definable fields

Options available on the form customization dialog box:

Form Customization Options

Option	Does this:
New	Creates a new form (screen).
Edit	Edits the screen name and description.
Delete	Deletes the selected screen.
Customize	Used to customize the selected screen.
Export	Used to create an export file.
Import	Used to import a screen file.

Clean	Removes (cleans) all form customizations from the selected screen.
Refresh	Refreshes the screen display.
Reset c. palette	Resets the customization palette, after using this option the application must be restarted.

How to access form customization

1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select the form to be customized and click the CUSTOMIZE button.
3. Four separate dialog boxes are displayed, they are:
   - The FORM to be customized.
   - The COMPONENT PALETTE - used to select the objects that should be placed on the screen.
   - The OBJECT INSPECTOR - used to change the properties of the selected objects.
   - The SCRIPT dialog box - used to set controls for mandatory fields and prompt users for action on click, exit or changing an event.
4. The form can now be customized as required.

How to define a new form

1. Click the SETUP menu and select FORM CUSTOMIZATION.

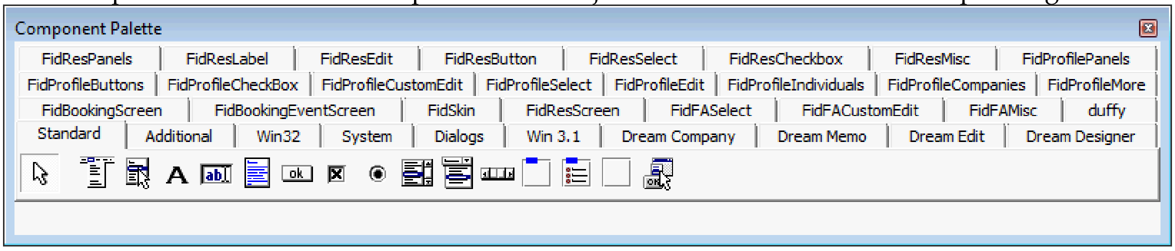
   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select the screen to be modified and click the NEW button.
3. The form customization dialog box is displayed.
4. Enter a NAME for the new form (screen).
5. Enter a description of the form in the COMMENT box.
6. Click the OK button to save the new form.

Form Customization dialog box

Field	Definition	Legal Values
Name	The name of the customized form. For example, 'Cashier' if you create a reservation lookup screen only for cashiers.	Up to 60 alphanumeric characters.
Comment	Description of the customized form. For example, 'Reservation lookup screen for cashiers'.	Up to 60 alphanumeric characters.

Component Palette

The Component Palette offers components and objects that can be used in screen painting.



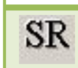
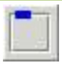
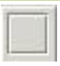
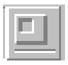
The following tabs can be used to modify the Fidelio Suite8 screens:

- FidResPanels - Panel objects for the reservation edit screen.
- FidResLabel - Label objects for the reservation edit screen.
- FidResEdit - Editable field objects for the reservation edit screen.
- FidResButton - Buttons for the reservation edit screen.
- FidResSelect - Selection field objects for the reservation edit screen.
- FidResCheckbox - Checkbox objects for the reservation edit screen.
- FidResMisc - Miscellaneous objects for the reservation edit screen.
- FidProfilePanels - Panel objects for the profile edit screen.
- FidProfileButtons -
- FidProfileCheckBox - Checkbox objects for the profile edit screen.
- FidProfileCustomEdit
- FidProfileSelect
- FidProfileEdit - Objects for the profile edit screen.
- FidProfileIndividuals
- FidProfileCompanies - Objects for the profile 2 edit screen.
- FidProfileMore - Objects for the profile 2 edit screen.
- FidBookingScreen - Objects for the booking edit screen in the Meeting Planner module
- FidBookingEventScreen - Objects for the event edit screen in the Meeting Planner module
- FidSkin
- FidResScreen
- FidFASelect
- FidFACurtomEdit
- FidFAMisc
- duffy
- Standard
- Additional
- Win32
- System
- Dialogs
- Win 3.1
- Dream Company
- Dream Memo
- Dream Edit
- Dream Designer

Note: If any of the tabs are not displayed, click the RESET C. PALETTE button on the From Customization dialog box and restart Fidelio Suite8.

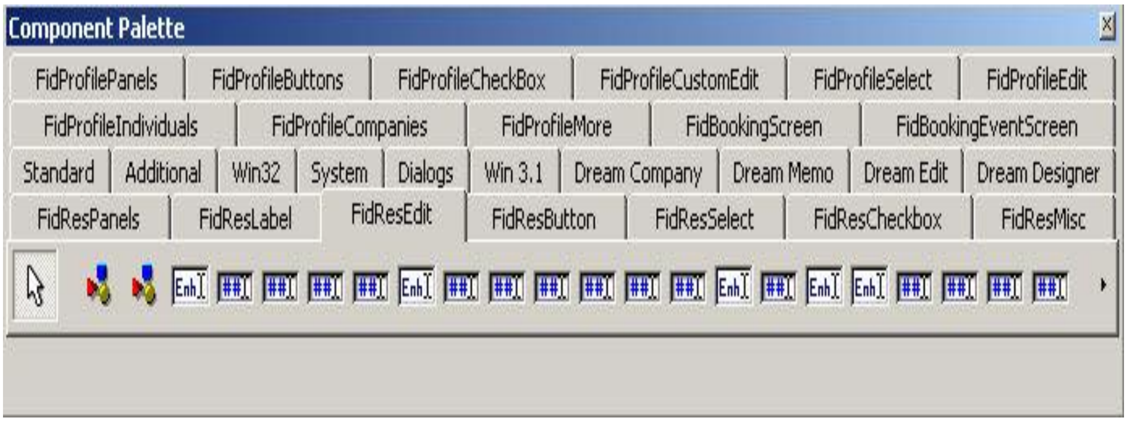
Objects can be placed on the screen from each tab of the component palette. Each object type that can be found on the different tabs is described in the Component Palette objects table.

Component Palette Objects

Button	Definition
	Label to be attached to a field.
	Regular editable field
	Memo field
	Button
	Check box; can specify values for check and blank. Default is check = T and blank = F.
	Radio button
	List box; arrow will display list box that allows a single selection.
	Combo box; arrow will display list box that allows selection of more than one choice.
	Scrollbar
	Group box - separate section of the screen for grouping together related fields.
	Radio group - separate section of the screen for grouping together radio buttons.
	Display Panel
	Action list
	Date/Time field, arrow will display either a calendar or a clock.
	Numeric editable field
	Bitbutton
	Regular editable field
	Bevel field -Bevel defines a surface with any angle other than a right angle
	Navigator button

Inserting a new field

1. On the component palette, click the screen name tab, e.g. FIDRESEDIT, the screen elements are displayed.
2. Place the cursor over the element to see a hint describing the element.

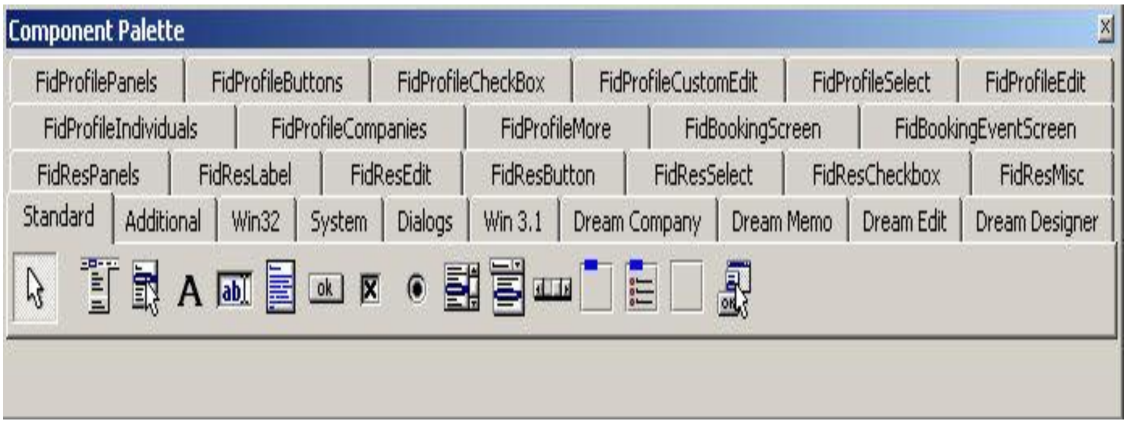


Each type of object is indicated by a different icon, for an explanation of the icons see the Component Palette dialog box.

3. Select the object to be added, for example to add the field CRS No, select the object ‘FidResEditCrsNumber’.
4. Click the position on the screen where the field should be placed.
5. The new field is added to the screen. You can drag the field to the correct position and resize as described in Basic Commands.
6. To save the screen, click the close window icon  on the top right of the screen.

Inserting a new label

1. On the component palette, click the STANDARD tab, the standard elements are displayed.
2. Place the cursor over the element to see a hint describing the element.



Each type of object is indicated by a different icon, for an explanation of the icons see the Component Palette dialog box.

3. Select the label to be added, a label object is indicated by the icon .
4. Click the position on the screen where the label should be placed, the label appears now with an automatically generated caption name.
5. To change the label properties select the OBJECT INSPECTOR dialog box.

6. Under APPEARANCE enter the required caption.

7. To save the screen, click the close window icon ✕ on the top right of the screen.

Inserting a user definable field

To add user definable fields to the screen the fields must first be added to the relevant database table, in the case of the reservation screen the tables are **YRCF** and **YRDF**. For the event edit screen the table is **YECF**. For the booking master edit screen the table is **YBCF**. See Table usage.

Table usage for YRCF, YRDF, YBCF and YECF

Table	Definition
YRCF	Table containing user-definable fields which are related to the table YRES. The values can not change during the stay of the guest.
YRDF	Table containing user -definable fields which are related to the table YDET. The values can change during the stay of a guest.
YBCF	Table containing user-definable fields which are related to the table YBOM.
YECF	Table containing user-definable fields which are related to the table YEVM.

In the following example the field YRCF_STRING with the data type 'varchar2 ' was added to the table YRCF using the following SQL command in TOAD or SQL worksheet:

```
ALTER TABLE YRCF ADD (YRCF_STRING VARCHAR2(100));
```

Note: When adding user definable numeric fields with more than 10 characters via TOAD, it is necessary to enter a scale of 1.

1. On the component palette, click the FIDRESEDIT tab, the screen elements are displayed.

2. Place the cursor over the element to see a hint describing the element.

3. Each type of object is indicated by a different icon, for an explanation of the icons see the Component Palette dialog box.

4. Select the object to be added, as you are inserting a user defined field select the object TFIDRESSTRINGCUSTOMFIELDEDIT.

5. Click the position on the screen where the field should be placed. The new field is added to the screen. You can drag the field to the correct position and resize as described in Basic Commands.

6. To define the field type select the OBJECT INSPECTOR dialog box.

7. Under FIDELIO select the option FIELDTYPE, in our example the field has been added to YRCF, so the selection is RES_YRCF.

8. Under FIDELIO select the option FIELDNAME to allocate a name to the field.

9. To save the screen, click the close window icon ✕ on the top right of the screen.

Note: Each time fields have been added to the tables YRCF and YRDF, Fidelio Suite8 has to be restarted to load the new fields.

Data Types and Fields which require Fidelio Suite8 to be restarted

Data Type	Field
Varchar2	FidResStringCustomFieldEdit
Number without decimals	FidResIntegerCustomFieldEdit
Number without decimals	FidResIntegerCustomFieldSpinEdit
Number with decimals (currency)	FidResExtendedCustomFieldEdit
Date	FidResDateCustomFieldEdit
Number (1)	FidResCustomFieldCheckBox
Long / Long Raw	Not supported

Component Palette - Objects available on FidResPanels Tab

This tab displays all PANEL objects that can be moved to the Edit Reservation screen:

FidResPanels Tab

Button	Definition
FidResPriceDisplayPanel	Display Panel for the Price detail on the reservation edit screen
FidResChildAgeDisplayPanel	Display Panel for the Child Age Categories on the reservation edit screen
FidResAttributeDisplayPanel	Display Panel for the Reservation Attributes (Source and Channel) on the reservation edit screen
FidResDayNavigatorPanel	Display Panel for the Days on the reservation edit screen
FidResProfileDetailsPanel	Display Panel for the Profile details on the reservation edit screen
FidResInventoryPanel	The panel for the Inventory Tab.
FidReslinkedProfilesPanel	Panel for the Linked Profiles Tab
FidResPackageGridPanel	Panel for the Package Grid Tab
FidResGridPanel	Panel for the Reservation Grid Tab
FidResAttributesPanel	Panel for the Attributes Tab.
FidResFixedChargesPanel	Panel for the Fixed Charges Tab

FidResMainEditPanel	The main Reservation Edit Panel
FidResIndicatorPanel	The panel where indicators such as 'share' are displayed
FidResGuestProfilesPanel	The guest profiles panel
FidResNotesPanel	The notes panel
FidResCreditCardResPanel	The credit card panel for credit cards related to the reservation
FidResCreditCardGuestPanel	The credit card panel for credit cards related to the guest profile
FidResCreditCardApprovalPanel	The credit card approval panel
FidResMealPlanPanel	The Meal Plan Panel
FidResAmenityPanel	The Amenity Panel
FidResPackagePanel	The Packages panel when selecting Packages from the Package grid.
FidResPackageFreqPanel	The Rate Packages panel when selecting Rate Packages from the Package grid.
FidResUniversalPanel	
FidResCustomEditPanel	
FidResBillingInfoPanel	
FidResCCContainerPanel	
FidResAttributesContainerPanel	
FidResMiniLinkedProfilesPanel	
FidResTransponderPanel	

Component Palette - Objects available on FidResLabel

This tab displays all LABEL objects that can be moved to the Edit Reservation screen:

FidReslabel Tab

Button	Definition
SR **FidResDataChangeLabel**	Defines the Data Change Label

FidResChildAgeCategoryLabel	Defines the Child Age Category Label
FidResArrivalLabel	Defines the Arrival Date Label
FidResDepartureLabel	Defines the Departure Date Label
FidResCurrentRoomLabel	Defines the Current Room Label
FidResRateMealLabel	Defines the Rate Meal Plan Label
FidResModifyLogLabel	Defines the Modify Log Label
FidResCancelledLabel	Defines the Cancelled Label
FidResAttributeLabel	Label for attribute box on the reservation edit screen
FidResDayNavigatorLabel	Label for the Day field on the Days on the reservation edit screen
FidResCustomFieldChangeLabel	Label for Custom Fields change on the reservation edit screen
FidResPriceLabel	Label for the Price Field on the reservation edit screen
TFidResExchLastUpdateLabel	To display the date the exchange rate was last updated
FidResExchRateLabel	Displays the current exchange rate.
FidResWeeklyRateLabel	Displays the weekly rate
FidResDayNavigatorLabel	Displays the days function on the edit reservation screen.
FidResPromotionLabel	Displays Promotions on the screen by day
FidResFreeNightLabel	Displays free night rebates on the screen

Component Palette - Objects available on FidResEdit

This tab displays all EDITABLE field objects that can be moved to the Edit Reservation screen:

FidResEdit Tab

Button	Definition
FidResArrivalDateEdit	Edit field for the Arrival Date
FidResDepartureDateEdit	Edit field for the Departure Date

FidResEditNights	Edit Field for the Number of nights
FidResEditRoomType	Edit Field for the room type field
FidResEditRateCode	Edit Field for the Rate Code field
FidResEditRateRoomType	Edit field for the Rate Room Type field
FidResEditRateAmount	Edit Field for the Rate Amount
FidResEditRoom	Edit Field for the Room number Field
FidResEditDesiredRoom	Edit Field for the desired room number
FidResEditDesiredRoomType	Edit Field for the desired room type
FidResEditBlock	Edit Field for the Block code
FidResEditGroup	Edit Field for the Group Code
FidResEditRateDifference	Edit Field for the Rate Difference
FidResEditParty	Field to edit the Name of the Party
FidResEditCreditLimit	Field to edit the Credit Limit
FidResEditDiscountPercentage	Edit Field for the Discount Percentage
FidResEditFree1	Edit field of the free formatted text field1
FidResEditFree2	Edit field of the free formatted text field2
FidResEditCRSNumber	Edit field for the CRS Number field
FidResEditFlightNumber	Edit Field for the Flight Number field
FidResEditCancellationNumber	Edit field for the Cancellation Number field
FidResCheckInTimeEdit	Edit Field for the Check in time
FidResCheckOutTimeEdit	Edit Field for the Check out time
FidResOptionDateEdit	Edit Field for the Option Date
FidResSaleDateEdit	Edit Field for the Sale Date

FidResAdultSpinEdit	Edit Field for the number of adults box
FidResNoOfRoomsSpinEdit	Edit Field for the number of rooms box
FidResChildAgeSpinEdit	Edit Field for the number of child age box
FidResStringCustomFieldEdit	Custom Field Edit on the reservation edit screen for string value fields
FidResIntegerCustomFieldEdit	Custom Field Edit on the reservation edit screen for integer value fields
FidResIntegerCustomFieldSpinEdit	Custom Field Edit number on the reservation edit screen for integer value fields
FidResExtendedCustomFieldEdit	Custom Field Edit on the reservation edit screen for extended custom fields
FidResDateCustomFieldEdit	Custom Field Edit on the reservation edit screen for date value fields
FidResEditExchUpdateValue	To display the value of days, used if selected refresh method is DAYS OF MONTH or X DAYS AFTER ARRIVAL.
FidResDayNavigatorSpinEdit	Edit field for the number of days on the days selection on the reservation edit screen

Component Palette - Objects available on FidResButton

This tab displays all Button objects that can be moved to the Edit Reservation screen:

FidResButton Tab

Button	Definition
FidResNightDownBitBtn	Button to move number of nights down.
FidResNightUpBitBtn	Button to move number of nights up.
FidResRoomTypeBitBtn	Bit Button to select the room type on the reservation edit screen.
FidResRateRoomTypeBitBtn	Bit Button to select the rate room type on the reservation edit screen.
FidResRoomBitBtn	Bit Button to select the room on the reservation edit screen.
FidResBlockBitBtn	Bit Button to select the block on the reservation edit screen.

FidResGroupBitBtn	Bit Button to select the group on the reservation edit screen
FidResRateCodeBitBtn	Bit Button to select the rate code on the reservation edit screen.
FidResProfileQuickLinkBitBtn	Bit Button to select the profile link on the reservation edit screen.
FidResFlightsBitBtn	Bit Button to select the flights (guest transportation) on the reservation edit screen.
FidResPartyBitBtn	Button to edit, delete or create a Party.
FidResDayNavigatorDownButton	Navigator down button for the days selection on the reservation edit screen.
FidResDayNavigatorUpButton	Navigator up button for the days selection on the reservation edit screen.
FidResDayNavigatorOpenCloseButton	OPEN/CLOSE button on the DAYS of the reservation edit screen.
FidResSaveButton	The Save Button on the edit reservation screen.
FidResCancelButton	The Cancel Button on the edit reservation screen.
FidResOptionsButton	The Options Button on the edit reservation screen.
FidResUniversalPanelSelectorButton	
FIdResBillingButton	Billing Button on the edit reservation screen.
FidResCurrentRoomButton	Current Room Button on the edit reservation screen.
FidResPoliceExportButton	Police Export Button on the edit reservation screen used with SBM Police Export

Component Palette - Objects available on FidResSelect

This tab displays all Selection or Combo box objects that can be moved to the Edit Reservation screen:

FidResSelect Tab

Button	Definition
FidResColor	Edit Field for the Reservation Colour field.
FidResMarketComboBox	Combo Box for the market codes on the reservation edit screen.
FidResSourceComboBox	Combo Box for the source codes on the reservation edit screen.
FidResChannelComboBox	Combo Box for the channel codes on the reservation edit screen.
FidResRoomFeaturesComboBox	Combo Box for the room feature codes on the reservation edit screen.
FidResGuaranteeCodeComboBox	Combo Box for the guarantee codes on the reservation edit screen.
FidResDefPaymentMethodComboBox	Combo Box for the payment method codes on the reservation edit screen.
FidResCurrencyComboBox	Combo Box for the currency codes on the reservation edit screen.
FidResmealComboBox	Combo Box for the number of Meals on the reservation edit screen.
FidResPolicyComboBox	Combo Box for the policy codes on the reservation edit screen.
FidResAmenityCycleComboBox	Combo Box for the amenity cycles on the reservation edit screen.
FidResRateDiffReasonComboBox	Combo Box for the rate difference reasons on the reservation edit screen.
FidResProfileComboBox	Combo Box for linked profiles on the reservation edit screen.
FidResAttributeComboBox	Combo Box for attribute codes on the reservation edit screen.
FidResExhangeRateCombo	Combo Box, choice of how the exchange rate should be updated.
FidResUniversalPanelSelector	

FidResExhangeRateDayofweek	To display the day of the week the exchange rate is updated. This should be used if the refresh method is DAY OF WEEK. Combo box; arrow will display list box that allows selection of more than one choice.
FidResDayNavigatorRangeComboBox	Combo Box for the day navigator range
FidResTaxExceptionCombo	Combo Box for tax excemption

Component Palette - Objects available on FidResCheckbox

This tab displays all Checkbox objects that can be moved to the Edit Reservation screen:

FidResCheckbox Tab

Button	Definition
FidResManualPriceCheckBox	Check Box for the Manual Price field on the reservation edit screen
FidResPrintRateCheckBox	Check Box for the Print Rate field on the reservation edit screen
FidResNoPostCheckBox	Check Box for the No Post field on the reservation edit screen
FidResTaxFreeAdultsCheckBox	Check Box for the Tax Free Adults field on the reservation edit screen
FidResBreakfastCheckBox	Check Box for the Breakfast field with Meal plan functionality on the reservation edit screen
FidResLunchCheckBox	Check Box for the Lunch field with Meal plan functionality on the reservation edit screen
FidResDinnerCheckBox	Check Box for the Dinner field with Meal plan functionality on the reservation edit screen
FidResCustomFieldCheckBox	Check Box for custom fields on the reservation edit screen.
FidResExchUpdateAtCheckinCheckBox	To display if the exchange rate is updated at check in or not. Check box; can specify values for check and blank. Default is check = T and blank = F.

FidResTypeDefRadioButton	Radio Button for the Definite Reservation Type
FidResTypeTentRadioButton	Radio Button for the Tentative Reservation Type
FidResDayNavigatorAllDaysButton	Label for the All Day field on the Days on the reservation edit screen
FidResDayNavigatorDaysAfterButton	Label for the Days After field on the Days on the reservation edit screen
FidResDayNavigatorOneDayButton	Label for the One Day field on the Days on the reservation edit screen
FidResLockRoomCheckBox	Check Box for 'Lock Rooms'. When adding the check box to the edit reservation screen, a warning message is displayed when this field is selected, a room number assigned and the room number is changed.

Component Palette - Objects available on FidResMisc

This tab displays all miscellaneous objects that can be moved to the Edit Reservation screen:

FidResMisc Tab

Button	Definition
FidResDayNavigatorShowHidePanel	The show/hide panel of the DAYS functionality on the edit reservation screen.
FidResEvents	Edit Events from Meeting Planner field on the reservation edit screen.

Component Palette FidProfilePanels Tab

This tab displays all PANEL objects that can be moved to the Edit Profile screen:

FidProfilePanels Tab

Button	Definition
FidProfileLinkedProfilePanel	The Panel for linked Profiles
FidProfileAddressPanel	The Address Panel
FidProfileCommunicationPanel	The Communication Panel
FidProfileMembershipPanel	The Panel for Membership types

FidProfileTransponderArrangementsPanel	The Panel for entering transponder arrangements
FidProfilePersonalDocumentsPanel	The Panel for entering personal documents.
FidProfilePanel1	The general Panel for editing profiles

Component Palette FidProfileButtons Tab

This tab displays all Button objects that can be moved to the Edit Profile screen:

FidProfileButton Tab

Button	Definition
FidProfileBtnRateCodes	Button to show rate codes linked to the profiles.
FidProfileBtnVirtualNumber	Button to show Virtual numbers.
FidProfileBitBtnInactiveReasons	Bit Button for entering reasons for turning a profile to the status not active.
FidProfileBitBtnCreditStatusReasons	Bit Button for entering the credit status reason.
FidProfileBitBtnPreferredRooms	Bit Button for the preferred rooms.
FidProfileImageButton	

Component Palette FidProfileCheckbox Tab

This tab displays all Checkbox objects that can be moved to the Edit Profile screen:

FidProfileCheckbox Tab

Button	Definition
FidProfileCheckBoxActive	Check Box for Active Profiles
FidProfileCheckBoxDisabledforHC	Check Box for disabling Profiles for Suite8 Central
FidProfileCheckBoxCreditStatusCashonly	Check Box for the Credit Status Cash Only
FidProfileCheckBoxCreditStatusBlackList	Check Box for the Credit Status Black List

FidProfileCheckBoxCreditStatusCityLedgerApproved	Check Box for the Credit Status City Ledger Approved
FidProfileCheckBoxPrimaryContact	Check Box for the Primary Contact
FidProfileCheckBoxMailingContact	Check Box for the Mailing Contact
FidProfileCheckBoxMale	Check Box for the field Male
FidProfileCheckBoxFemale	Check Box for the field Female
FidProfileCheckBoxFamilyMailing	Check box for Family Mailing
FidProfileCheckBoxNoMailing	Check box for No Mailing
FidProfileCheckBoxSaveProfile	Check box for Save Profile
FidProfileRadioButtonDisplayCCM	Radio Button for the CCM Display
FidProfileRadioButtonDisplayFO	Radio Button for the FO Display
FidProfileRadioButtonDisplayALL	Radio Button for the ALL Display

Component Palette FidProfileCustomEdit

This tab displays all objects that can be moved to the Edit Profile screen for customized fields that have been added to the table YPCF:

FidProfileCustomEdit Tab

Button	Definition
FidProfileStringCustomFieldEdit	For custom fields with a string value.
FidProfileIntegerCustomFieldEdit	For custom fields with integer value.
FidProfileExtendedCustomFieldEdit	For custom fields with integer value.
FidProfileDateCustomFieldEdit	For custom date fields.

Component Palette FidProfileSelect Tab

This tab displays all objects for Selection or Combo box objects that can be moved to the Edit Profile screen.

FidProfileSelect Tab

Button	Definition
FidProfileSingleFMCombo1	Combo Box for single preferences
FidProfileMultiFMComboPreferences	Combo Box for multiple preferences
FidProfileDropDownComboSalesManager	Combo Box for the sales manager
FidProfileDropDownComboPreferredCurrency	Combo Box for preferred currency
FidProfileDropDownComboSimpleComission	Combo Box for simple commission
FidProfileDropDownComboLanguage	Combo Box for language
FidProfileDropDownAddressGreeting	Combo Box for address greeting
FidProfileDropDownLetterGreeting	Combo Box for letter greeting
FidProfileDropDownNationality	Combo Box for nationality
FidProfileDropDownDay	Combo Box for day
FidProfileDropDownMonth	Combo Box for month
FidProfileDropDownPreferredRooms	Combo Box for preferred rooms
FidProfileDropDownPreferredDistribution	Combo Box for preferred distribution
FidProfileDropDownContactPreference	Combo Box for contact preference
FidProfileDropDownWPHS_ID	Combo Box for wphs_id
FidProfileDropDownTaxExemption	Combo Box for tax exemption
FidProfileFMComboSimpleCommission	Combo Box simple commission

Component Palette - Objects available on FidProfileEdit

This tab displays all objects that can be moved to the Edit Individual and Company Profile screen:

FidProfileScreen Tab

Button	Definition
FidProfileLinkedProfilesPanel	Display Panel for the linked Profiles on the Edit Profile Screen.
FidProfileAddressPanel	Display Panel for the Address on the Edit Profile Screen.
FidProfileCommunicationsPanel	Display Panel for the Communications on the Edit Profile Screen.
FidProfileMembershipPanel	Display Panel the Membership types on the Edit Profile Screen.
FidProfileEditSearchName	Edit Field for the Search Name on the Edit Profile Screen.
FidProfileEditDivision	Edit Field for the Division on the Edit Company Profile Screen.
FidProfileEditInactiveTime	Edit Field for the Inactive Time on the Edit Profile Screen.
FidProfileEditCreditStatusTime	Edit Field for the Credit Status Time on the Edit Profile Screen.
FidProfileEditLastName	Edit Field for the Last Name on the Edit Profile Screen.
FidProfileEditMiddleName	Edit Field for the Middle Name on the Edit Profile Screen.
FidProfileEditFirstName	Edit Field for the First Name on the Edit Profile Screen.
FidProfileEditMailName	Edit Field for the Mail Name on the Edit Profile Screen.
FidProfileEditPosition	Edit Field for the Position Field on the Edit Profile Screen.
FidProfileEditDepartment	Edit Field for the Department Field on the Edit Profile Screen.
FidProfileEditTitle	Edit Field for the Title Field on the Edit Profile Screen.
FidProfileEditBirthPlace	Edit Field for the Place of Birth Field on the Edit Profile Screen.

FidProfilePreferredRooms	Edit Field for the Preferred Rooms Field on the Edit Profile Screen
FidProfileMaskEditYear	Edit Field for the Year of Birth on the Edit Profile Screen.
FidProfileDuffyMemoFullName	Edit Field for the Full Name on the Company Profile.
FidProfileEnhEditNumberofEmployees	Edit Field for the Number of Employees.
FidProfileEnhEditRevPotentialRooms	Edit Field for the Potential Rooms on the Company Profile Screen.
FidProfileEnhEditRevPotentialCatering	Edit Field for the Potential Catering on the Company Profile Screen.
FidProfileEnhEditTraceFreq	Edit Field for the Trace Freq Field on the Edit Profile Screen.
FidProfileCheckBoxActive	Check Box for the Active field on the Edit Profile Screen.
FidProfileCheckBoxCreditStatus CashOnly	Check Box for the Credit Status C field on the Edit Profile Screen.
FidProfileCheckBoxCreditStatus BlackList	Check Box for the Credit Status R field on the Edit Profile Screen.
FidProfileCheckBoxCreditStatus CityLedgerApproved	Check Box for Credit Status A field on the Edit Profile Screen.
FidProfileCheckBoxPrimaryContact	Check Box for the Primary Contact field on the Company Edit Profile Screen.
FidProfileCheckBoxMailingContact	Check Box for the Mailing Contact field on the Edit Company Profile Screen.
FidProfileCheckBoxFemale	Check Box for the Female field on the Edit Profile Screen.
FidProfileSingleFMCombo1Box	
FidProfileMultiFMPreferences	Combo Box for the multi selection on preferences.

FidProfileDropDownCombo SalesManager	Combo Box for the Sales Manager field.
FidProfileDropDownComboPreferred Currency	Combo Box for the Preferred Currency field.
FidProfileDropDownComboSimple Commission	Combo Box for the Simple Commission field on the Edit Company Profile Screen.
FidProfileDropDownComboLanguages	Combo Box for the Languages on the Edit Profile Screen.
FidProfileDropDownComboAddress Greeting	Combo Box for Address Greeting Field on the Edit Profile Screen.
FidProfileDropDownComboLetter Greeting	Combo Box for Address Greeting Field on the Edit Profile Screen.
FidProfileDropDownNationality	Drop Down field for Nationality Field on the Edit Profile Screen.
FidProfileDropDownDay	Drop Down field for the Birthday Day Field on the Edit Profile Screen.
FidProfileDropDownMonth	Drop Down field for the Birthday Month Field on the Edit Profile Screen.
FidProfileDropDownPreferredRooms	Drop Down field for the Preferred Rooms Field on the Edit Profile Screen.
FidProfileDropDownPreferredDistribution	Drop Down field for the Preferred Distribution Field on the Edit Company Profile Screen.
FidProfileDropDownPreferredContact	Drop Down field for the Preferred Contact Field on the Edit Profile Screen
FidProfileDateEdit1	Edit field for the Date.
FidProfileTimeEdit1	Edit Field for the Time.
FidProfileBitBtnInactiveReason	Button to edit Inactive Reasons.
FidProfileBitBtnCreditStatusReason	Button to edit Credit Status Reasons.

FidProfileBitBtnPreferredRooms	Button to edit Preferred Rooms.
FidProfileColorBox1	Edit Field for the colour Box.
FidProfileRadioButtonCCM	The Radio Button to mark Display in CCM only.
FidProfileRadioButtonFO	The Radio Button to mark Display in FO only.
FidProfileRadioButtonAll	The Radio Button to mark Display ALL.
FidProfileSpinEdit1	
FidProfileLabel1	
FidResPriceLabel	Label for the Price Field on the reservation edit screen.
FidProfileImageButton1	
FidProfilePanel1	
FidProfileEvents	
FidProfileEditWebLogin	Edit Field for the Web Login.
FidProfileEditWebPassword	Edit Field for the Web Password.

Component Palette - Objects available on FidBookingScreen

This tab displays all objects that can be moved to the Edit Booking and Edit Event Booking screen:

FidBookingScreen Tab

Button	Definition
FidBookingGeneralInformation Panel	Display Panel for the General Information.
FidBookingInformationPanel	Display Panel for the Information.
FidBookingLinkedProfilesPanel	Display Panel for the Linked Profiles.
FidBookingLabelContactonSite	The Label for the Contact on Site.
FidBookingContactonSiteEdit	The Edit Field for the Contact on Site.

FidBookingCompanyLinkedLabel	The Label for the Company Field.
FidBookingCompanyLinked Combo	The Combo Box for the Company Field.
FidBookingIndividulLinkedLabel	The Label for the Company Field.
FidBookingIndividualLinked Combo	The Combo Box for the Individual Field.
FidBookingPanel	The Booking Panel.
FidBookingLabelBookingName	The Label for the Booking Name.
FidBookingNameEdit	Edit field for the Booking Name.
FidBookingLabelBookingId	The Label for the Booking ID.
FidBookingBookingIDEnhanced Edit	Edit field for the Booking Id.
FidBookingLabelDepartureDate	The Label for the Departure Date.
FidBookingDepartureDate	Edit field for the Departure Date.
FidBookingLabelArrivalDate	The Label for the Arrival Date.
FidBookingArrivalDate	Edit Field for the Arrival Date.
FidBookingLabelAccountManager	The Label for the Account Manager Field.
FidBookingAccountManager Combo	The Combo Box for the Account Manager Field.
FidBookingLabelMainMarket	The Label for the Main Market Segm. Field.
FidBookingMainMarketSegmentCombo	Displays a combo box which combines the market codes with their main market code grouped by main market code. It shows market code/ description / main market code / description of main market code.

	This combo box is inserted by default when creating a new screen.
FidBookingLabelMarketSegment	The Label for the Market Segment Field.
FidBookingMainandMarketSegmentCombo	Displays a combo box which combines the main market code and market code grouped by main market. It shows main market code, market code, market code description.
FidBookingSourceLabel	The Label for the Source Field.
FidBookingSourceCombo	The Combo Box for the Source Field.
FidBookingCategoryBooking GroupBox	The Group Box for the Conference, Rooms and Both Radio Buttons.
FidBookingConference RadioButton	Selection Button for Conference.
FidBookingRoomsRadioButton	Selection Button for Rooms.
FidBookingConferenceandRooms RadioButton	Selection Button for Conference and Rooms.
FidBookingCreditStatusLabel	The Label for the Credit Status Field.
FidBookingCreditStatusBevel	The Box for the Credit Statuses.
FidBookingCreditStatusCash CheckBox	Check Box for the Credit Status Cash C.
FidBookingCreditStatusRooms CheckBox	Check Box for the Credit Status Rooms R.
FidBookingCreditStatusAccount CheckBox	Check Box for the Credit Status Accounts A.
FidBookingMainAndMarket Segment ComboBox	Combo Box for the main market and the market segments.
FidBookingConference GroupBox	Group Box for the Conference Booking Information.
FidBookingConference StatusLabel	Label for the Conference Status.

FidBookingConference StatusCombo	Combo Box for the Conference Status.
FidBookingConferenceManager Label	Label for the Conference Manager Field.
FidBookingConferenceManager Combo	Combo Box for the Conference Manager.
FidBookingNrAttendeesLabel	Label for the number of attendees field.
FidBookingNrAttendeesEnhanced Edit	Edit Field for the number of attendees.
FidBookingConferenceDecision DateLabel	The Label for the Decision Date Field.
FidBookingConferenceDecision Date	Edit Field for the Decision Date.
FidBookingFollowUpDateLabel	The Label for the Follow Up Date Field.
FidBookingFollowUpDate	Edit Field for the Follow Up Date.
FidBookingConferenceCutOff DateLabel	The Label for the Conference Cut Off Date Field.
FidBookingConferenceCutOff Date	Edit Field for the Conference Cut Off Date.
FidBookingConferenceInfo BoardLabel	The Label for the Conference Info Board.
FidBookingConferenceInfor BoardEdit	Edit field for the Conference Info Board.
FidBookingConferenceFunction TypesLabel	The Label for the Conference Function Types Field.
FidBookingConferenceFunction TypesCombo	Combo Box for the Conference Function Types.
FidBookingConference CurrencyLabel	The Label for the Conference Currency Field.
FidBookingConfence CurrencyCombo	The Combo Box for the Conference Currency Field.
FidBookingConferenceDetailConfirmed CheckBox	Check Box for the Details Confirmed Field.
FidBookingConference FSDistributedCheckBox	Check Box for the FS Confirmed Field.

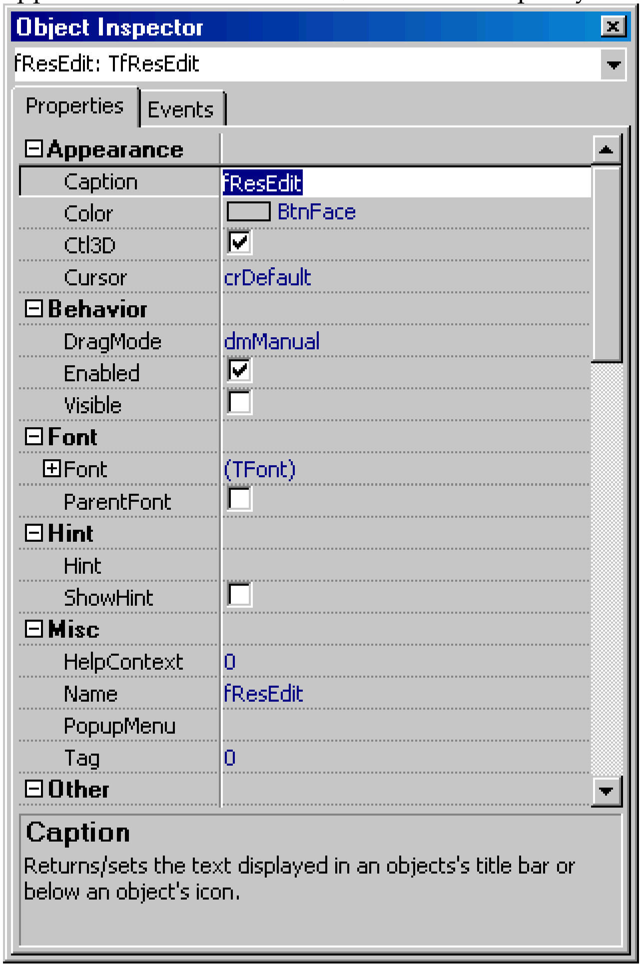
FidBookingConferenceContract NumberLabel	The Label for the Conference Contract Number Field.
FidBookingConferenceContract NumberEdit	Edit field for the Conference Contract Number.
FidBookingRoomsGroupBox	Group Box for the Rooms Section on the Booking Screen.
FidBookingRoomsInformation Panel	The Rooms Information Panel.
FidBookingRoomStatusLabel	Label for the Room Status Field.
FidBookingRoomStatusCombo	Combo Box for the Room Status Field.
FidBookingRoomManagerLabel	Label for the Room Manager Field.
FidBookingRoomManager Combo	Combo Box for the Rooms Manager Field.
FidBookingRoomsDecision DateLabel	Label for the Rooms Decision Date Field.
FidBookingRoomsDecision Date	Edit Field for the Rooms Decision Date.
FidBookingRoomsFollowUp DateLabel	Label for the Rooms Follow Up Date Field.
FidBookingRoomsFollowUpDate	Edit Field for the Rooms Follow Up Date.
FidBookingIndividualReservation GroupBox	Group Box for the Individual Reservation Section.
FidBookingNumberofIndividual ReservationLabel	Label for Number of reservations field.
FidBookingNumberofIndividual ReservationEnhancedEdit	Edit field for the Number of reservations.
FidBookingNewIndividual ReservationButton	Button for New Reservation.
FidBookingAttachedIndividual ReservationButton	Button for Attached Reservation.
FidBookingGroupsReservations GroupBox	Group Box for the Group Reservations Section.

FidBookingReservationGroup NameLabel	Label for the Group Name Field.
FidBookingReservationGroup NameEdit	Edit field for the Group Name.
FidBookingNewGroup ReservationButton	Button for New Group Reservation.
FidBookingAttachedGroup ReservationButton	Button for Rooming List.
FidBookingBlocksReservations GroupBox	Group Box for the Block Reservations Section.
FidBookingReservationBlock NameLabel	Label for the Block Name Field.
FidBookingReservationBlock NameEdit	Edit field for the Block Name.
FidBookingNewGroup ReservationButton	Button for New Block Reservation.
FidBookingAttachedGroup ReservationButton	Button for Room Grid.
FidBookingProfilesSelectPanel	Panel for the Profile Selection on the Reservation/Group/Block Reservations.
FidBookingSelectBlock ReservationButton	Select Button on the Block Reservation Section.
FidBookingSelectGroup ReservationButton	Select Button on the Group Reservation Section.
FidBookingSelectIndividual ReservationButton	Select Button on the Individual Reservation Section.

Note: FidBookingMainMarketSegmentCombo should be used instead of FidBookingMainMarketCombo and FidBookingMarketSegmentCombo as they are now obsolete and will be removed in a future release.

Properties

Use the properties options from the Object Inspector panel to select a font, control the position and appearance of a field or label, as well as to specify control information, such as field length.



How to change a font or style

1. Click on the label or field you want to change to select it.

   The Object Inspector dialog box displays the field/label properties and events.

2. Select the PROPERTIES tab, the Property Editor dialog box appears.
3. Expand the FONT options and select the desired char set, colour, height, font, pitch and size from the appropriate list boxes
4. Check BOLD, ITALIC, UNDERLINE or STRIKEOUT if desired.

How to specify a number of max characters allowed on a field

1. Click on the label or field you want to change to select it.

   The Object Inspector dialog box displays the field/label properties and events.

2. Select the PROPERTIES tab, the Property Editor dialog box appears.
3. Select the field MAXLENGTH.
4. Enter the number of max characters allowed. For example on the field FIDPROFILEEDITLASTNAME1 the allowed characters are 35, if only 25 characters should be entered, change the MAXLENGTH to 25.

How to display only attributes to users or user groups that are assigned

1. Select a RESEDIT form
2. Press CUSTOMIZE Button
3. On the Resedit form click on the TFIDRESATTRIBUTEDISPLAYPANEL
   The Object Inspector dialog box displays the properties and events of this panel
4. On the PROPERTIES tab, navigate to the option ATTRUSERLINKED and select this
   Save the form and assign it to users or user groups
5. Users or user groups using this form will only see attributes belonging to attribute categories marked as being displayed on the First Page of the Reservation edit dialog box.

User Assignment

This option is used to assign specific users or user groups to specific screens and is accessible via the option FORM CUSTOMIZATION on the Setup menu.

How to assign screens to users or user groups

1. Click the SETUP menu and select FORM CUSTOMIZATION.

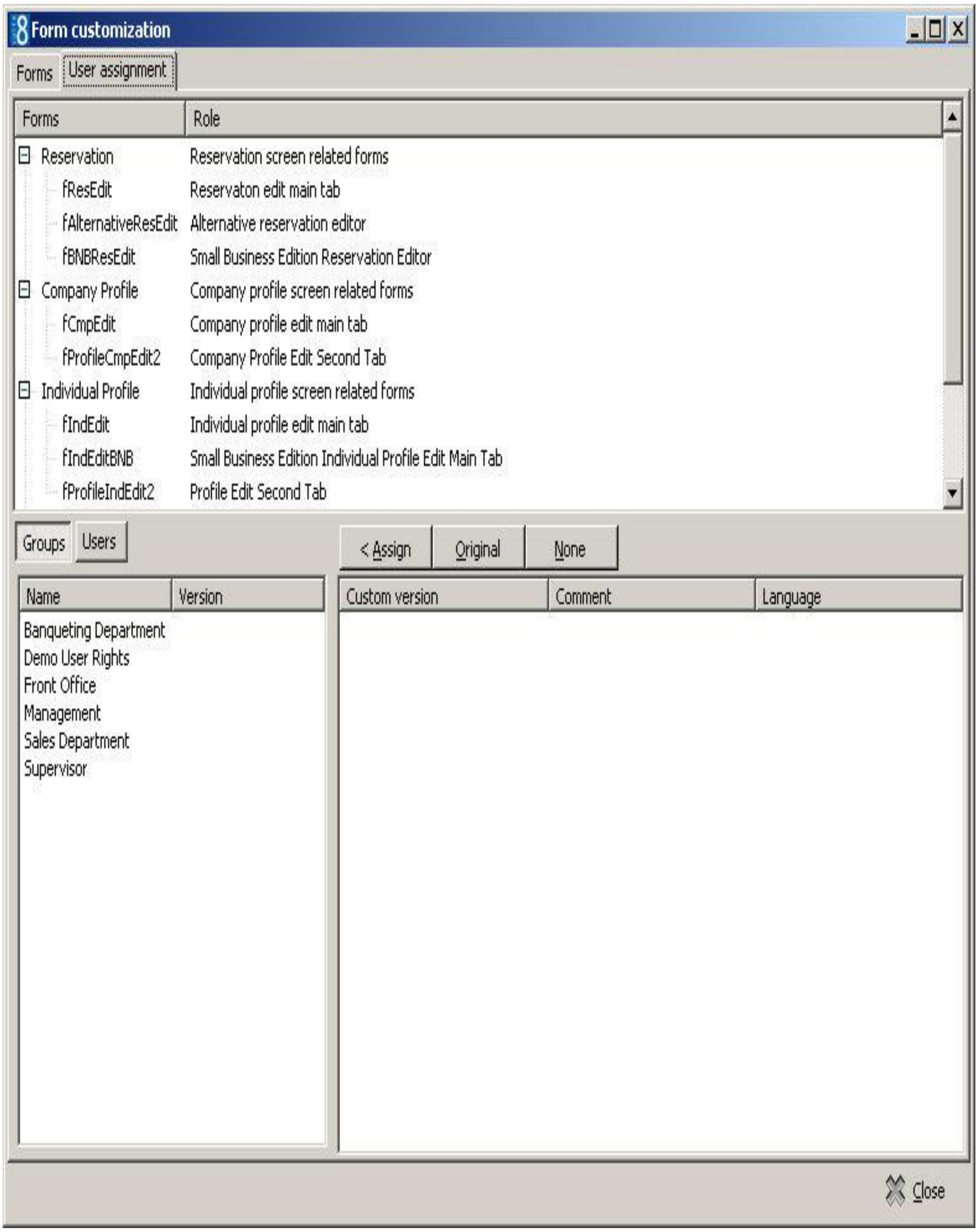
   The form customization screen is displayed divided into two tabs:

   - Forms - used to customize screens.
   - User assignment - used to assign screens to users or user groups.

3. Click the USER ASSIGNMENT tab.

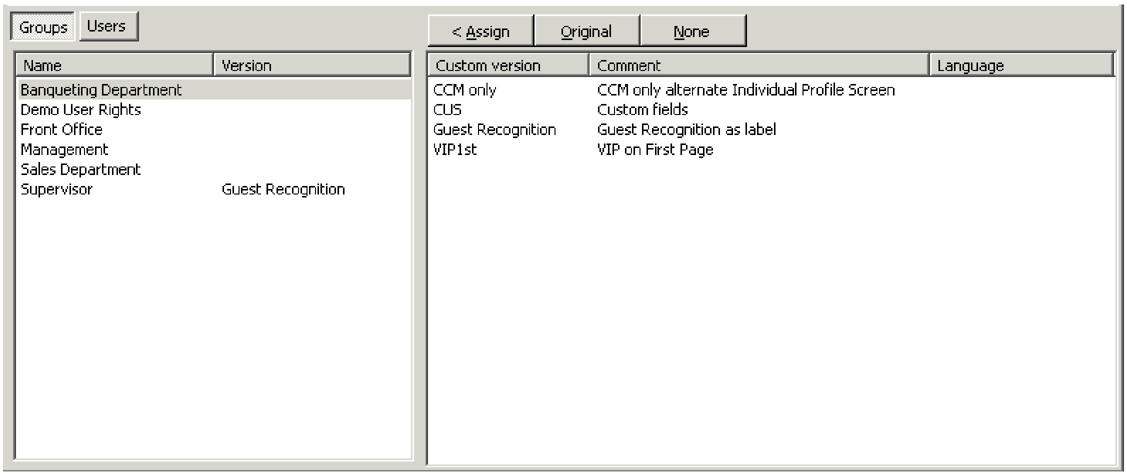
   The User assignment screen is displayed split into two sections:

   - The available form types are listed in the upper part of the screen.
   - The users and user groups are listed in the lower part of the screen.



3. The GROUPS tab is selected by default and lists the defined user groups, to list all defined users click the USERS tab.

4. Select the form type to be assigned:
   - On the lower left-hand side of the screen any currently assigned screens are listed next to the user or user group.
   - On the lower right-hand side the customized versions of the selected form type are listed.



5. Select the user or user group to which the screen layout is to be assigned.
6. Select the customized version of the screen which is to be assigned from the list on the right.
7. Click the ASSIGN button, the selected screen name is now listed next to the selected user or user group.
8. The screen assignment can be removed by clicking the NONE button and the original screen can be assigned by clicking the ORIGINAL button.
9. Click the CLOSE button to save the screen assignment.

Form Customization Tips and How To's

The following is a list of the available tips and tricks for form customization:

- How to add customized buttons to the reservation screen
- How to add the video check-out option to the reservation screen
- How to add page up and page down buttons to the reservation screen
- How to add desired room type selection to the reservation screen
- How to add user defined check boxes on individual or company profiles
- How to add currency exchange rate display to the reservation screen
- How to add a web login to the profile screen
- How to allow a profile to be marked as do not transfer
- How to combine the entries of two character fields in a third character field
- How to combine the entries of two numeric fields into a third field
- How to set the discount amount and discount % fields to read only based on the selected rate code
- How to add customized fields
- How to add customized fields2
- Displaying HTML files - Guest Recognition
- More information on fields and procedure names used on the reservation detail
- Correct customized screens

How to add an option button to the reservation screen

Items from the options menu of the reservation edit screen such as confirmation letter, billing instructions or guest comments can be added to the edit reservation screen as a button for fast access.

In the Object Inspector the menu options which are available are listed either under MENUITEM or MENUITEM2; if the required option is listed under MenuItem2 then the option USEMENUITEM2 must be selected.

How to add a customized button to the edit reservation screen

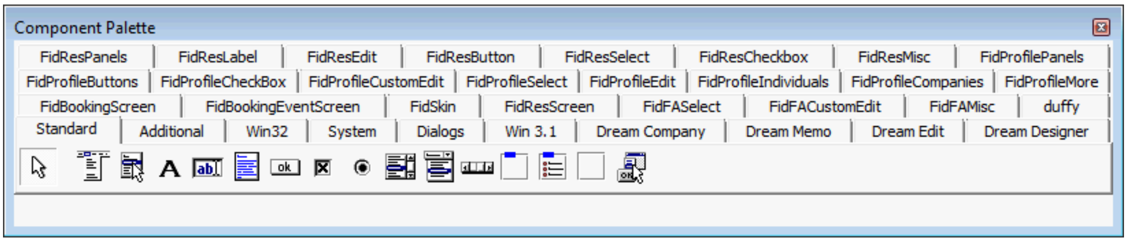
1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.

2. Select the form to be customized and click the CUSTOMIZE button.

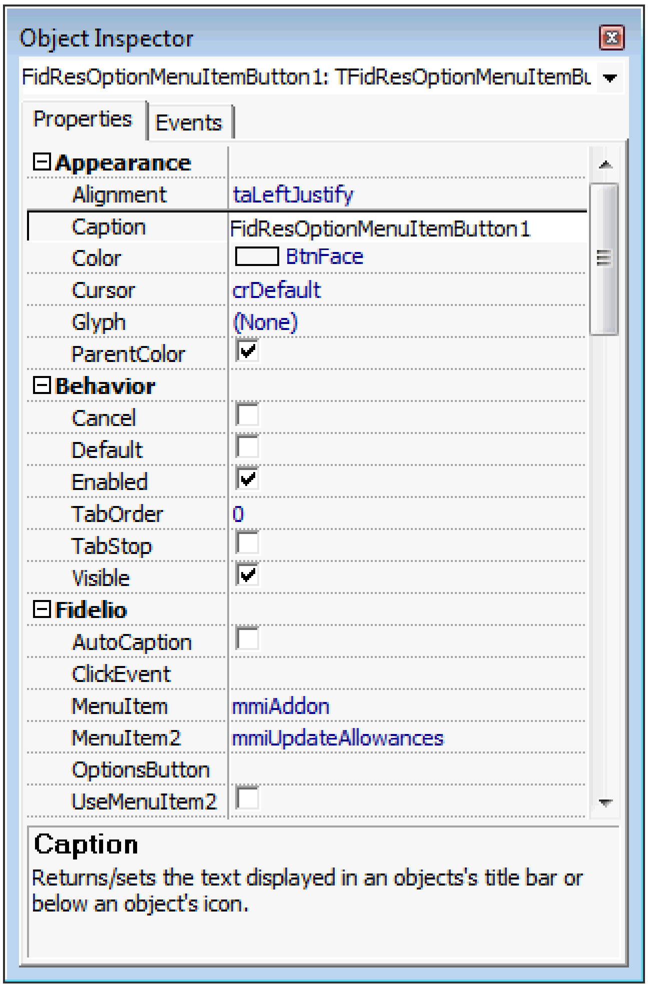
3. Four separate dialog boxes are displayed, they are:
   - The FORM to be customized.
   - The COMPONENT PALETTE - used to select the objects that should be placed on the screen.
   - The OBJECT INSPECTOR - used to change the properties of the selected objects.
   - The SCRIPT dialog box - used to set controls for mandatory fields and prompt users for action on click, exit or changing an event.

4. On the Component Palette, click the FIDRESBUTTON tab.



5. Click the button FIDRESOPTIONMENUITEMBUTTON and then place the button by clicking the required location on the reservation form.

6. With the button still selected on the reservation form select the OBJECT INSPECTOR dialog box in order to change the properties of the button.



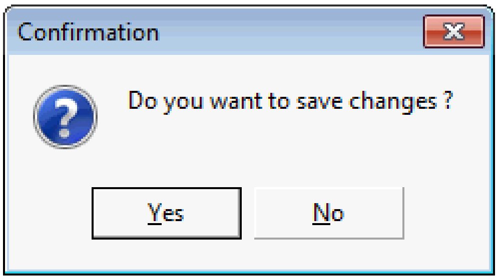
7. Under APPEARANCE click CAPTION and enter the text to appear on the button.

8. Under FIDELIO click either MENUITEM or click MENUITEM2 and select the required option from the drop-down list.

9. If the required option was selected from MENUITEM2 then select the option USEMENUITEM2.

7. Close the form customization dialog boxes by clicking the  in the top right hand corner of the FRESEDIT screen.

8. A message is displayed asking if you want to save the changes.



11. Select YES to save the changes and close all the dialog boxes.

12. Click CLOSE to close the Form customization screen.

Note: To display the customized form in the application it must be assigned to a user or group of users.

How to add the video check-out option to the reservation screen

The form customization option may be used to add the video check-out check box to the reservation edit screen; this check box works in conjunction with the video interface so as to allow the guest to check-out via video check-out.

How to add the video check-out option to the edit reservation screen

1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select a reservation form to be customized and click the CUSTOMIZE button.
3. On the Component Palette, click the FIDRESCHECKBOX tab.
4. Click the check box FIDRESVIDCHKOCHECKBOX and then place the check box by clicking the required location on the reservation form.
5. With the button still selected on the reservation form select the OBJECT INSPECTOR dialog box in order to change the properties of the button.
6. Under APPEARANCE click CAPTION and enter the text to appear on the button.
7. Close the form customization dialog boxes by clicking the ☒ in the top right hand corner of the FRESEDIT screen.

   A message is displayed asking if you want to save the changes.
8. Select YES to save the changes and close all the dialog boxes.
9. Click CLOSE to close the Form customization screen.

Changes are displayed in the user log if the option Reservation Video checkout flag is selected in Setup → Configuration → Users → User Log → Reservation.

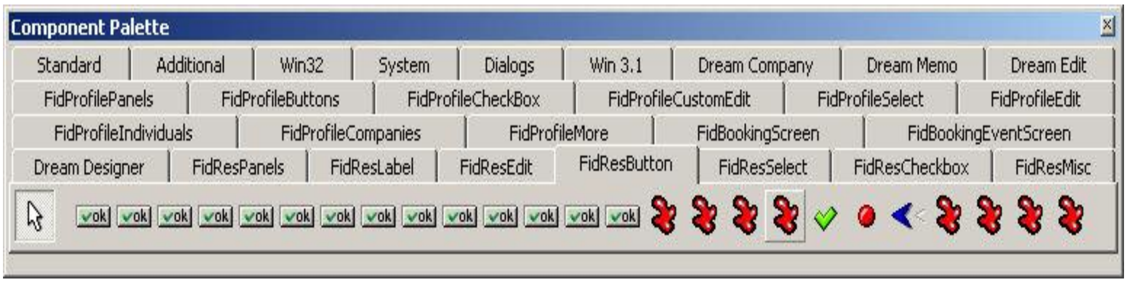
How to add page up and page down buttons to the reservation screen

The form customization option may be used to add page up and page down buttons to the edit reservation screen in order to scroll through reservations in edit mode.

How to add page up and page down buttons to the edit reservation screen

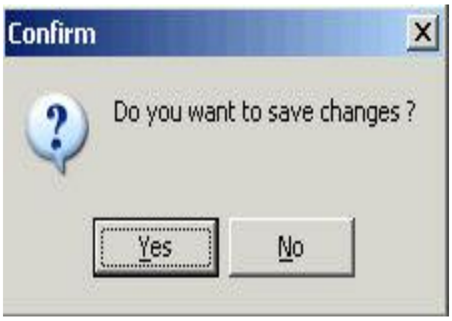
1. From the Setup main menu click FORM CUSTOMIZATION.

   The form customization screen appears displaying a list of the screens that can or have been customized.
2. Select the form to be customized and click the CUSTOMIZE button.
3. Four separate dialog boxes are displayed, they are:
   - The FORM to be customized.
   - The COMPONENT PALETTE - used to select the objects that should be placed on the screen.
   - The OBJECT INSPECTOR - used to change the properties of the selected objects.
   - The SCRIPT dialog box - used to set controls for mandatory fields and prompt users for action on click, exit or changing an event.
4. On the Component Palette, click the FIDRESBUTTON tab.



5. Click the button FIDRESPAGEUP and then place the button by clicking the required location on the reservation form, the button size can be adjusted if required.

6. Repeat steps 4 and 5 for the button FIDRESPAGEDOWN.
7. Close the form customization dialog boxes by clicking the  in the top right hand corner of the FRESEDIT screen.
8. A message is displayed asking if you want to save the changes.



9. Select YES to save the changes and close all the dialog boxes.
10. Click CLOSE to close the Form customization screen.

Note: To display the customized form in the application it must be assigned to a user or group of users.

How to add desired room type selection to the reservation screen

The form customization option may be used to add a room type selection button and a desired room type selection field to the reservation edit screen for informational purposes.

How to add desired room type selection to the edit reservation screen

1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select a reservation form to be customized and click the CUSTOMIZE button.
3. On the Component Palette, click the FIDRESBUTTON tab.
4. Click the button FIDRESDESIREDROOMTYPEBITBTN and then place the button by clicking the required location on the reservation form.
5. With the button still selected on the reservation form select the OBJECT INSPECTOR dialog box in order to change the properties of the button.
6. Under APPEARANCE click CAPTION and enter the text to appear on the button.
7. On the Component Palette, click the FIDRESEDIT tab.

8. Click the field FidResEditDesiredRoomType and then place the field next to the room type selection button.
9. Close the form customization dialog boxes by clicking the in the top right hand corner of the fResEdit screen.

   A message is displayed asking if you want to save the changes.
10. Select Yes to save the changes and close all the dialog boxes.
11. Click Close to close the Form customization screen.

How to add user defined check boxes on individual or company profiles

In this example we have added the field YPCF_CHECKBOX with the data type NUMBER 1 to the reservation edit table YPCF:
alter table ypcf add ypcf_checkbox number(1);

1. Click the Setup menu and select Form Customization.
2. Create a new profile form or select a profile form to be customized and click the Customize button.
3. On the Component Palette, click the FidProfileCheckbox tab.
4. Click the field object FidProfileCustomFieldCheckbox and place the field by clicking the required location on the form.
5. With the field still selected on the reservation form select the Object Inspector dialog box and enter the field name under Caption.
6. Close the form customization dialog boxes by clicking the in the top right hand corner of the screen.

   A message is displayed asking if you want to save the changes.
7. Select Yes to save the changes and close all the dialog boxes.
8. Assign the screen to the required users or user groups.
9. Click Close to close the Form customization screen.

How to add currency exchange rate display to the reservation screen

The form customization option may be used to the currency exchange rate display to the reservation edit screen.

How to add currency exchange rate display to the edit reservation screen

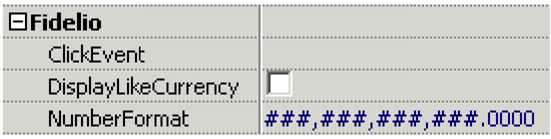
1. Click the Setup menu and select Form Customization.

   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select a reservation form to be customized and click the Customize button.
3. On the Component Palette, click the FidResLabel tab.
4. Click the field FidResExchRateLabel and then place the field by clicking the required location on the reservation form.
5. With the field still selected on the reservation form select the Object Inspector dialog box in order to change the properties of the field.
6. Under Fidelio click DisplayLikeCurrency if the exchange rate should be displayed with the same number of decimals as the currency of the rate.
7. Under Fidelio click NumberFormat and enter the format in which the currency should be displayed.

Placeholders are independent from the regional settings of the computer, but the display of the exchange rate in the reservation edit screen is based on the regional setting. The following placeholders for digits can be used:

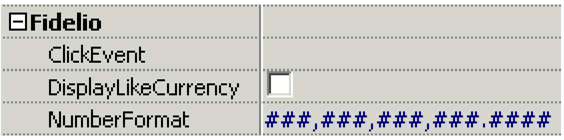
- 0 Always digits, no matter if there is a value or not
- # Digits are only shown if there is a value
- , Thousand separator
- . Decimal separator

The setup below will display the digits before the decimal separator only if there is a value, but always display the four digits after the decimal separator.



Exchange Rate	Exchange Rate Display
1.22000000	1.2200
0.64600000	.6460
122.46710000	122.4671

The setup below will display up to a maximum of four digits after the decimal separator only if there is a value.



Exchange Rate	Exchange Rate Display
1.22000000	1.22
0.64600000	.646
122.46710000	122.4671

8. Close the form customization dialog boxes by clicking the [X] in the top right hand corner of the FRESEDIT screen.

   A message is displayed asking if you want to save the changes.

10. Select YES to save the changes and close all the dialog boxes.
11. Click CLOSE to close the Form customization screen.

How to add a web login to the profile screen

The form customization option may be used to add web login and web password fields to the profile screen. The assigned web login and password can then be used for the web booking engine.

How to add a web login to the profile screen

1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.

2. Select a profile form to be customized and click the CUSTOMIZE button.

3. On the Component Palette, click the FIDPROFILEEDIT tab.
4. Click the field FIDPROFILEEDITWEBLOGIN and then place the field by clicking the required location on the profile form.
5. Click the field FIDPROFILEEDITWEBPASSWORD and place next to the web login field on the profile form.
6. Close the form customization dialog boxes by clicking the ☒ in the top right hand corner of the screen.

   A message is displayed asking if you want to save the changes.
7. Select YES to save the changes and close all the dialog boxes.
8. Click CLOSE to close the Form customization screen.

> **Note:** User names for the web login are case sensitive. If a user name that already exists is entered via web booking or on a profile an error message is displayed.

How to allow a profile to be marked as do not transfer

The form customization option may be used to create a check box on the profile screen which can be used for marking profiles as 'Do not transfer' in a Suite8 Central environment.

How to add the do no transfer checkbox to the profile screen

1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select a profile form to be customized and click the CUSTOMIZE button.
3. On the Component Palette, click the FIDPROFILECHECKBOX tab.
4. Click the field FIDPROFILECHECKBOXDISABLEDFORHC and then place the field by clicking the required location on the profile form.
5. Close the form customization dialog boxes by clicking the ☒ in the top right hand corner of the screen.

   A message is displayed asking if you want to save the changes.
6. Select YES to save the changes and close all the dialog boxes.
7. Click CLOSE to close the Form customization screen.

How to combine the entries of two character fields into a third field

The form customization option may be used to combine the entries of two character fields into a third character field on both the reservation and CCM booking edit screens.
The fields must first be added to the required tables via TOAD or SQL Developer, YRCF for reservations and YBCF for CCM booking.
For example: Entering the string MICROS in field1 and FIDELIO in field 2 will result in MICROS FIDELIO being display in the field 3 when saving the reservation or booking.

How to combine the entries of two character fields into a third character field

In this example we have added three VARCHAR2 fields to the booking edit table YBCF:
alter table ybcf add ybcf_test1 varchar2(10);
alter table ybcf add ybcf_test2 varchar2(10);
alter table ybcf add ybcf_result varchar2(20);

1. Click the SETUP menu and select FORM CUSTOMIZATION.
2. Create a new booking edit form or select a booking edit form to be customized and click the CUSTOMIZE button.
3. On the Component Palette, click the FIDBOOKINGSCREEN tab.
4. Click the field FIDBOOKINGCUSTOMSTRINGFIELDEDIT and place the field by clicking the required location on the form.
5. Repeat step 5 twice so that you have three FIDBOOKINGCUSTOMSTRINGFIELDEDIT on the form.
6. Select one of the fields on the form and select the OBJECT INSPECTOR dialog box in order to allocate the field name.
7. Under FIDELIO click FIELDNAME and enter the name of the field, in our example this would be ybcf_test1.
8. Repeat step 8 for the fields ybcf_test2 and ybcf_result.
9. Select the SCRIPT dialog box and enter the following script:

   procedure beforevalidation;

   begin

   booking.setCustomFieldByName('YBCF_RESULT'):=booking.getCustomFieldByName('YBCF_test1')+' '+booking.getCustomFieldByName('YBCF_test2');

   end;
10. Close the form customization dialog boxes by clicking the  in the top right hand corner of the booking edit screen.

    A message is displayed asking if you want to save the changes.
11. Select YES to save the changes and close all the dialog boxes.
12. Assign the screen to the required users or user groups.
13. Click CLOSE to close the Form customization screen.

How to combine the entries of two numeric fields into a third field

The form customization option may be used to combine the entries of two numeric fields into a third numeric field on both the reservation and CCM booking edit screens.
The fields must first be added to the required tables via TOAD or SQL Developer, YRCF for reservations and YBCF for CCM booking.
For example: Entering the amount 2.50 in field1 and 3.50 in field 2 will result in 6.00 being display in the field 3 when saving the reservation or booking.

How to combine the entries of two numeric fields into a third numeric field

In this example we have added three NUMBER fields to the booking edit table YBCF:
alter table ybcf add ybcf_testnum1 number(30,4);
alter table ybcf add ybcf_testnum2 number(30,4);
alter table ybcf add ybcf_result1 number(30,4);

1. Click the SETUP menu and select FORM CUSTOMIZATION.
2. Create a new booking edit form or select a booking edit form to be customized and click the CUSTOMIZE button.
3. On the Component Palette, click the FIDBOOKINGSCREEN tab.

4. Click the field FIDBOOKINGCUSTOMNUMBERFIELDEDIT and place the field by clicking the required location on the form.
5. Repeat step 5 twice so that you have three FIDBOOKINGCUSTOMNUMBERFIELDEDIT on the form.
6. Select one of the fields on the form and select the OBJECT INSPECTOR dialog box in order to allocate the field name.
7. Under FIDELIO click FIELDNAME and enter the name of the field, in our example this would be ybcf_testnum1.
8. Repeat step 8 for the fields ybcf_testnum2 and ybcf_result1.
9. Select the SCRIPT dialog box and enter the following script:

   procedure beforevalidation;

   begin

   booking.setCustomFieldByName('YBCF_RESULT1'):=booking.getCustomFieldByName('YBCF_testnum1')+booking.getCustomFieldByName('YBCF_testnum2');

   end;

10. Close the form customization dialog boxes by clicking the  in the top right hand corner of the booking edit screen.

    A message is displayed asking if you want to save the changes.
11. Select YES to save the changes and close all the dialog boxes.
12. Assign the screen to the required users or user groups.
13. Click CLOSE to close the Form customization screen.

How to set the discount amount and discount % fields to read only based on the rate code

The form customization option may be used to set the discount amount and discount % fields on the reservation screen as accessible only for specific rate codes; for all other rate codes or when no rate code is entered the discount amount and discount % fields are read only.

The script required for this functionality contains two procedures:

- formshow - sets the fields discount amount and discount % to read only when opening a reservation with none of the defined rate codes.
- b - verifies that the two fields are set to read only / not read only whenever you change the rate code by manually entering it, choosing it from the rate code selection screen or removing it from the reservation.

> **Note:** The second procedure can be named as required; in our example script the procedure is called b.

How to set the discount amount and discount % fields to read only based on the rate code

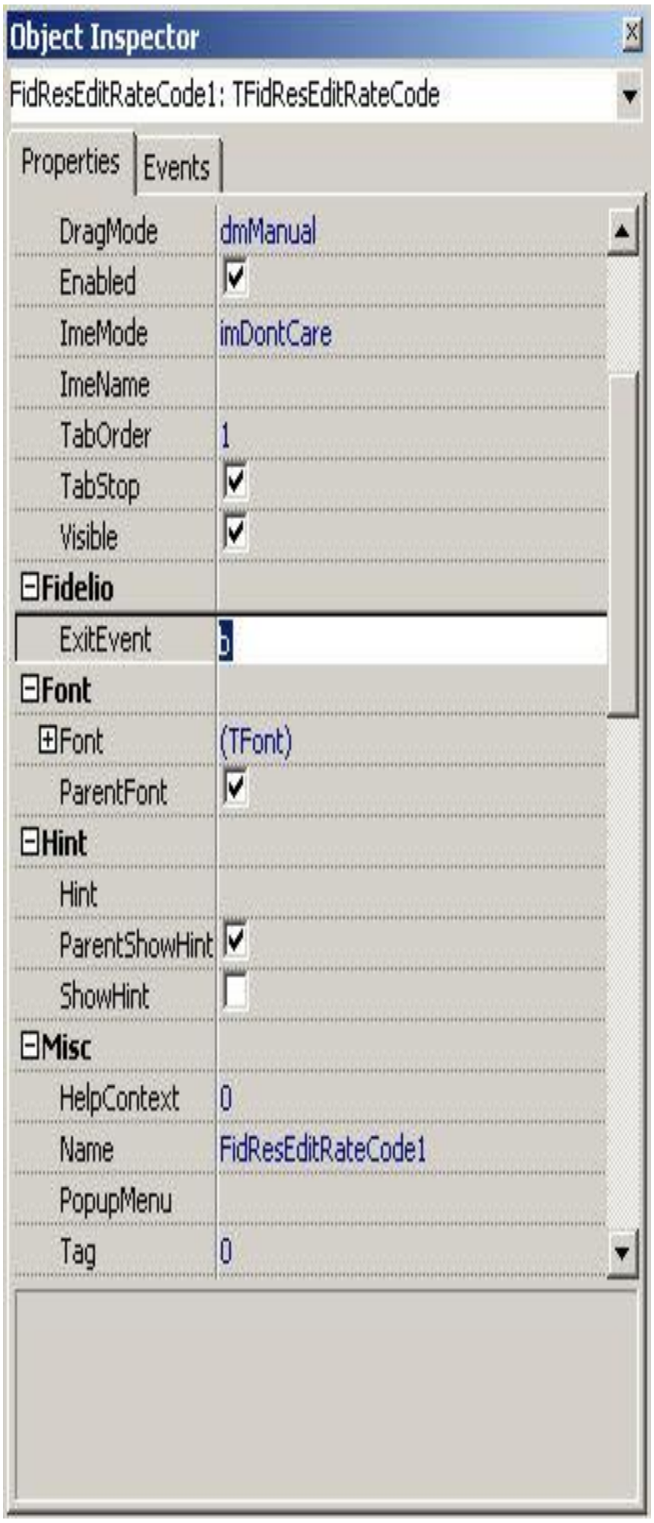
1. Click the SETUP menu and select FORM CUSTOMIZATION.

   The form customization screen is displayed with a list of the screens that can or have been customized.
2. Select the reservation form to be customized and click the CUSTOMIZE button.
3. Select the SCRIPT dialog box and enter the following script:

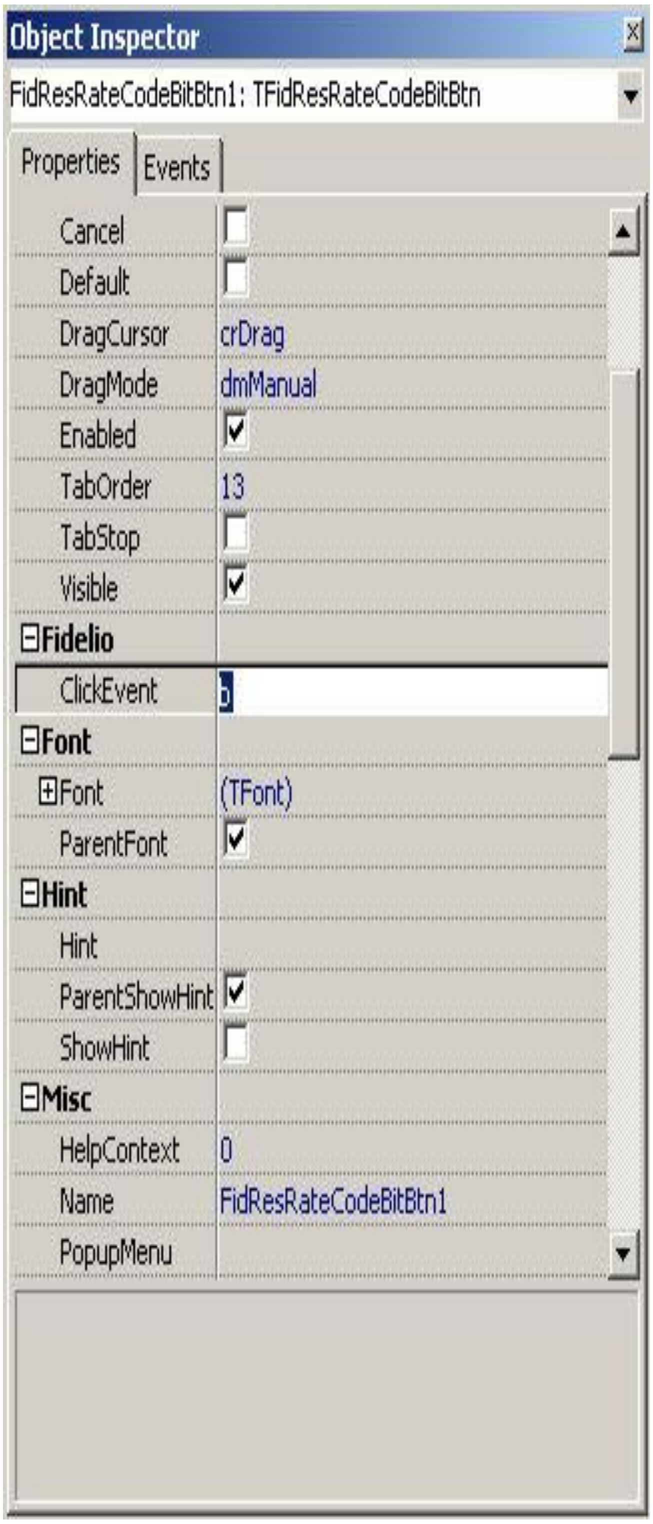
Note: Amend the script to include the rate code header id of the rate codes for which a discount can be assigned. In this example script the rate code header id's 1003 (Rack Rate) and 1024 (Tennis Package) are used.

```
procedure formshow;
var requestscreenrefresh: boolean;
var d: ReservationDetail;
begin
d:= reservation.getDetailByIndex(0);
if FidResEditRateDifference1.enabled then begin
if (d.yrch_id<>1003) or (d.yrch_id<>1024) then begin FidResEditRateDifference1.ReadOnly:=TRUE; end; requestscreenrefresh:= true;
if (d.yrch_id<>1003) or (d.yrch_id<>1024) then begin FidResEditDiscountPercentage1.ReadOnly:=TRUE; end; requestscreenrefresh:= true;
if (d.yrch_id=1003) or (d.yrch_id=1024) then begin FidResEditRateDifference1.ReadOnly:=FALSE; end; requestscreenrefresh:= true;
if (d.yrch_id=1003) or (d.yrch_id=1024) then begin FidResEditDiscountPercentage1.ReadOnly:=FALSE;  end; requestscreenrefresh:= true;
end;
end;
procedure b;
var requestscreenrefresh: boolean;
var d: ReservationDetail;
begin
d:= reservation.getDetailByIndex(0);
if (d.yrch_id<>1003) or (d.yrch_id<>1024) then begin FidResEditRateDifference1.ReadOnly:=TRUE; end; requestscreenrefresh:= true;
if (d.yrch_id<>1003) or (d.yrch_id<>1024) then begin FidResEditDiscountPercentage1.ReadOnly:=TRUE; end; requestscreenrefresh:= true;
if (d.yrch_id=1003) or (d.yrch_id=1024) then begin FidResEditRateDifference1.ReadOnly:=FALSE; end; requestscreenrefresh:= true;
if (d.yrch_id=1003) or (d.yrch_id=1024) then begin FidResEditDiscountPercentage1.ReadOnly:=FALSE;  end; requestscreenrefresh:= true;
scriptMakeVisibleIfTabsheetNotActive(self);
end;
```

4. Select the RATE CODE field on the form and select the OBJECT INSPECTOR dialog box in order to allocate the procedure name.
5. Under FIDELIO click EXITEVENT and enter the name of the procedure, in our example this would be B.



6. Select the RATE CODE selection button on the form and select the OBJECT INSPECTOR dialog box in order to allocate the procedure name.
7. Under FIDELIO click CLICKEVENT and enter the name of the procedure, in our example this would be B.



8. Close the form customization dialog boxes by clicking the in the top right hand corner of the reservation edit screen.

   A message is displayed asking if you want to save the changes.

9. Select YES to save the changes and close all the dialog boxes.

10. Assign the screen to the required users or user groups.

11. Click CLOSE to close the Form customization screen.

Note: Rate Code Promotions are not affected by the screen painting.

How to add customized fields

The form customization option may be used to add user-definable fields to various screens. Before fields can be placed on a screen they must first be added to the relevant database table via TOAD or SQL Developer:

- Reservation screen the tables are YRCF and YRDF
- Booking master edit screen the table is YBCF
- Event edit screen the table is YECF
- Profile edit screen the table is YPCF

How to add customized fields

In this example we have added the field yrcf_string with the data type VARCHAR2 to the reservation edit table YRCF:
alter table yrcf add yrcf_string varchar2(100);

1. Click the SETUP menu and select FORM CUSTOMIZATION.
2. Create a new reservation form or select a reservation form to be customized and click the CUSTOMIZE button.
3. On the Component Palette, click the FIDRESEDIT tab.
4. Click the field object FIDRESSTRINGCUSTOMFIELDEDIT and place the field by clicking the required location on the form.
5. With the field still selected on the reservation form select the OBJECT INSPECTOR dialog box in order to allocate the field name.
6. Under FIDELIO click FIELDNAME and enter the name of the field, in our example this would be yrcf_string.
7. Under FIDELIO the option FIELDTYPE has automatically been completed with Res_YRCF, as in our example the field was added to YRCF.
8. Close the form customization dialog boxes by clicking the  in the top right hand corner of the booking edit screen.

   A message is displayed asking if you want to save the changes.
9. Select YES to save the changes and close all the dialog boxes.
10. Assign the screen to the required users or user groups.
11. Click CLOSE to close the Form customization screen.

Note: Each time fields have been added to the tables YRCF, YRDF, YBCF, YECF or YPCF Fidelio Suite8 has to be restarted to load the new fields. Customised fields added to the table YPCF can be included in the profile edit screens when selecting FIDPROFILEMORE tab. When adding user definable numeric fields with more than 10 characters via TOAD, it is necessary to enter a scale of 1.

FidBookingEventCustomStringFieldEdit1 - FidBookingEventScreen tab

FidBookingEventCustomNumberFieldEdit1

FidBookingCustomerNumberFIeldEdit

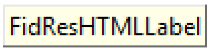
FidBookingCustomNumberFieldEdit1

Displaying HTML files - Guest Recognition

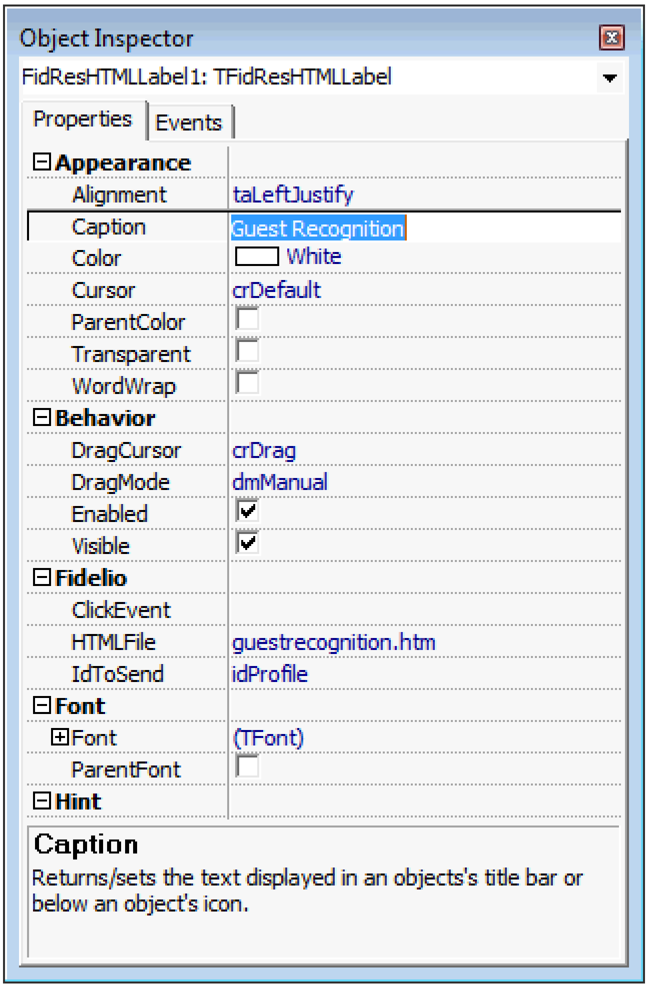
Guest Recognition HTML files can be called from either the edit reservation or edit profile screen or both. or from the reservation.htm or individualprofile.htm file by implementing a hyperlink. HTML and query files for guest recognition have been added to the standard HTML files called:
guestrecognition.htm

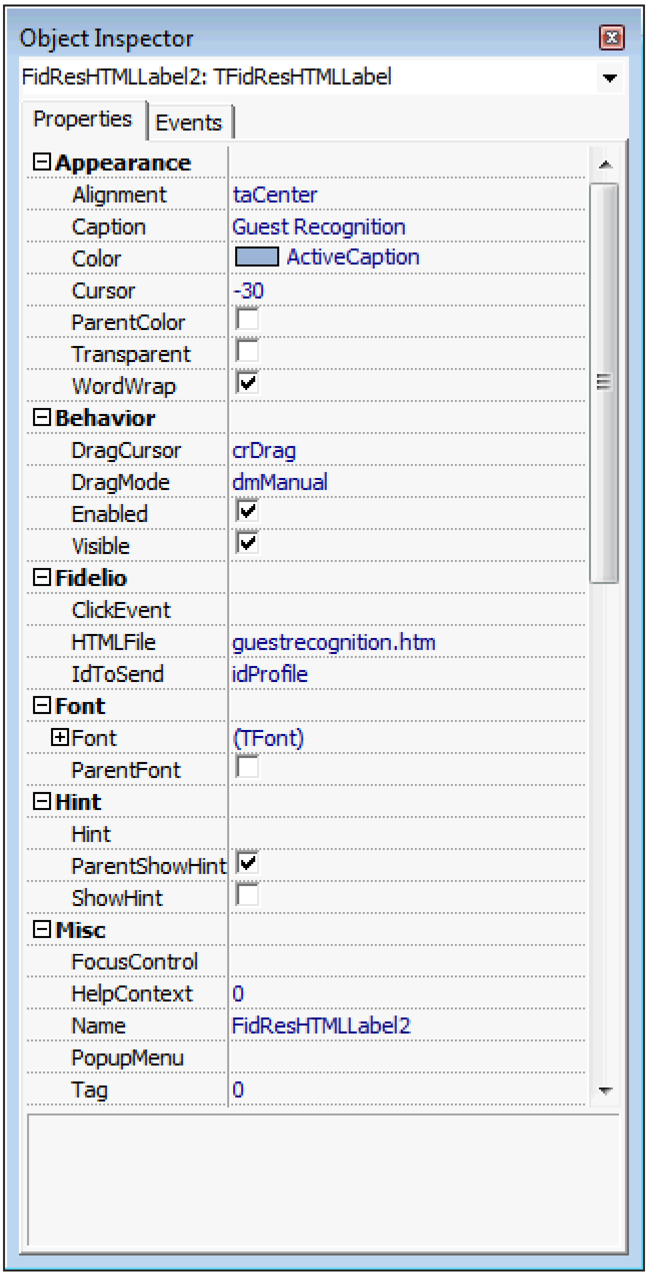
and **guestrecognition.qry**.
When calling the HTML file from a profile or reservation edit dialog box, information about the guest such as stays, preferences, history and comments is displayed.
To use this feature, the corresponding forms have to be customized and the files: **GuestRecognition.htm** and **GuestRecognition.qry** have to reside in the defined HTML directory of Fidelio Suite8.

Customising the reservation edit form

1. Click the Setup menu and select Form Customization.
2. Create a new reservation form or select a reservation form to be customized and click the Customize button.
3. On the Component Palette, click the FidResLabel tab.
4. Click the label FidResHTMLLabel 

and place the label by clicking the required location on the form.
5. With the label still selected on the reservation form select the Object Inspector dialog box in order to change the properties of the label.
6. Under Appearance click Caption and enter the text to appear on the label, for example, Guest Recognition.
7. Define any other appearance settings such as colour and word wrap as required.
8. Under Fidelio click HTMLFile and enter the name of the html file located in the html directory of Fidelio Suite8, in our example this would be guestrecognition.htm.
9. Under Fidelio the option IdToSend has been automatically completed with **IdProfile**.


Object Inspector
FidResHTMLLabel1: TFidResHTMLLabel
Properties
Events
Appearance
Alignment
taLeftJustify
Caption
Guest Recognition
Color
White
Cursor
crDefault
ParentColor
Transparent
WordWrap
Behavior
DragCursor
crDrag
DragMode
dmManual
Enabled
Visible
Fidelio
ClickEvent
HTMLFile
guestrecognition.htm
IdToSend
idProfile
Font
Font
(TFont)
ParentFont
Hint
Caption
Returns/sets the text displayed in an objects's title bar or below an object's icon.



10. Close the form customization dialog boxes by clicking the  in the top right hand corner of the reservation edit screen.

    A message is displayed asking if you want to save the changes.

11. Select YES to save the changes and close all the dialog boxes.

12. Assign the screen to the required users or user groups.

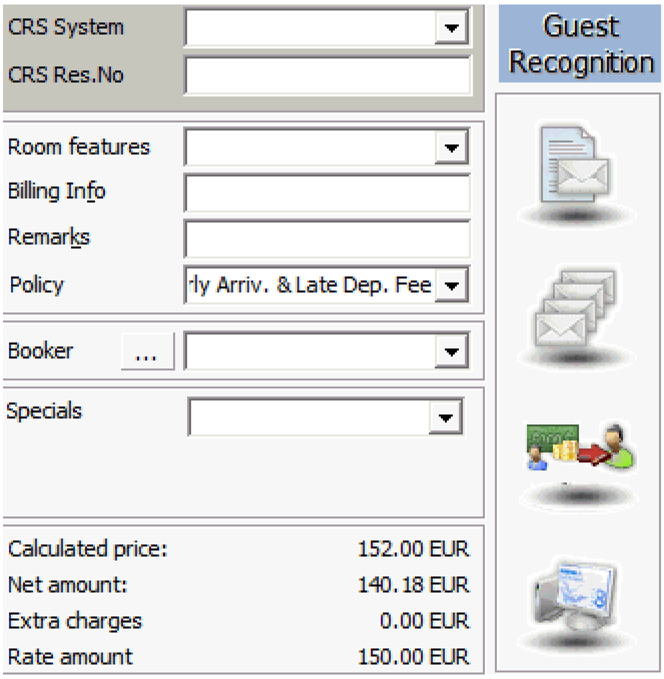
13. Click CLOSE to close the Form customization screen.

    Example 1

    In this example, the Guest Recognition link has been added to the arrivals panel on the edit reservation form.

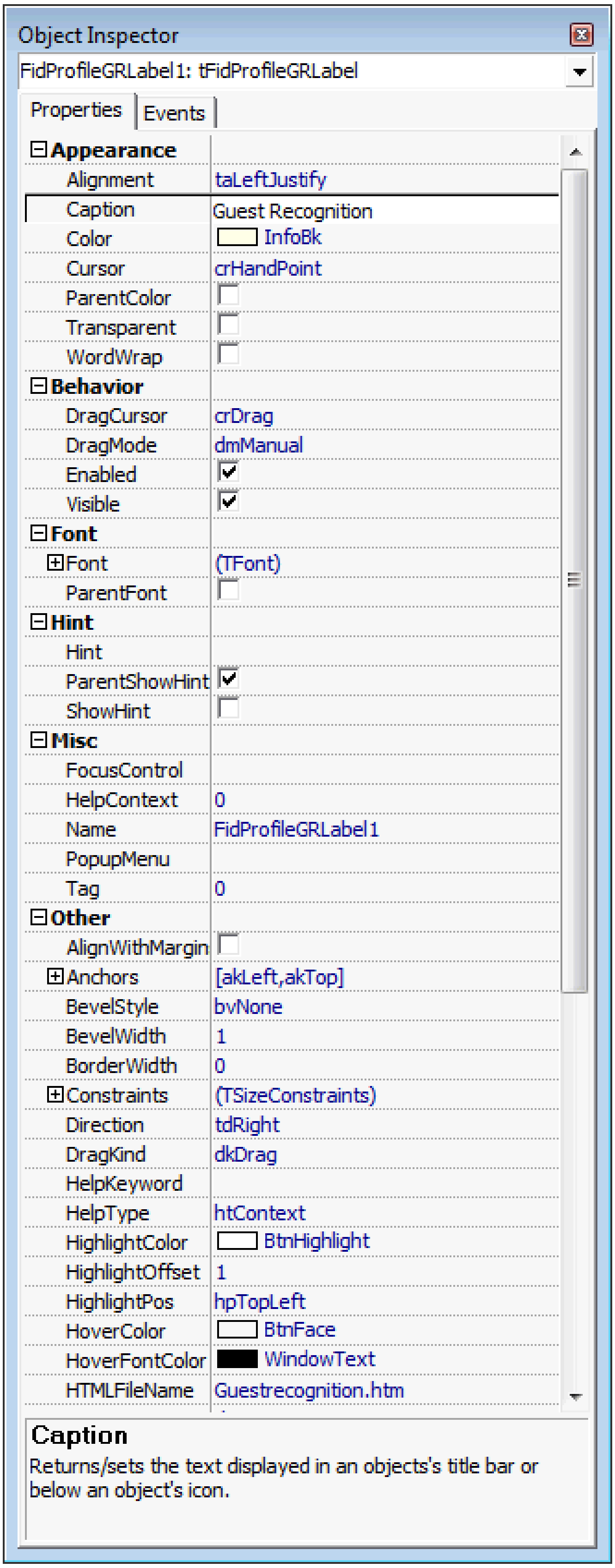
Example 2

In this example, the Guest Recognition link has been added to a panel on the right of the edit reservation form.



Customising the individual Profile edit form

1. Click the Setup menu and select Form Customization.
2. Create a new individual profile form or select an individual profile form to be customized and click the Customize button.
3. On the Component Palette, click the FidProfileMore tab.
4. Click the label FidProfileGRLabel and place the label by clicking the required location on the form.
5. With the label still selected on the profile form select the Object Inspector dialog box in order to change the properties of the label.
6. Under Appearance click Caption and enter the text to appear on the label, for example, Guest Recognition.
7. Define any other appearance settings such as colour and word wrap as required.
8. Under Other click HTMLFileName and enter the name of the html file located in the html directory of Fidelio Version 8, in our example this would be guestrecognition.htm.

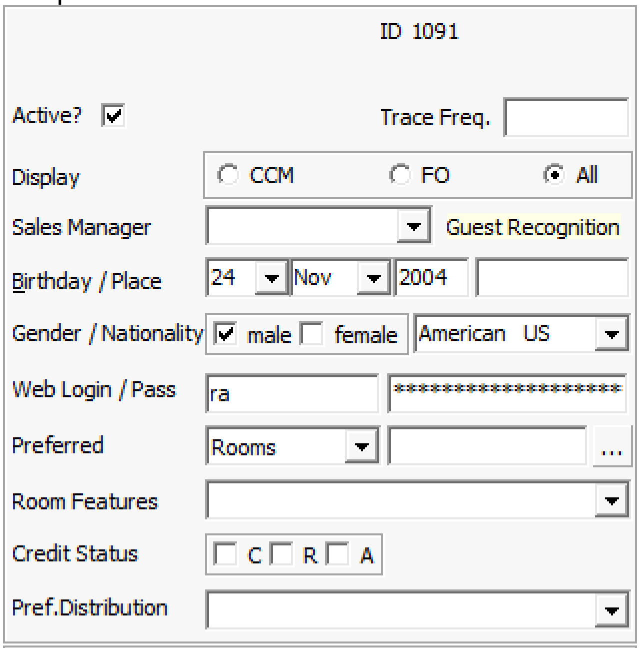


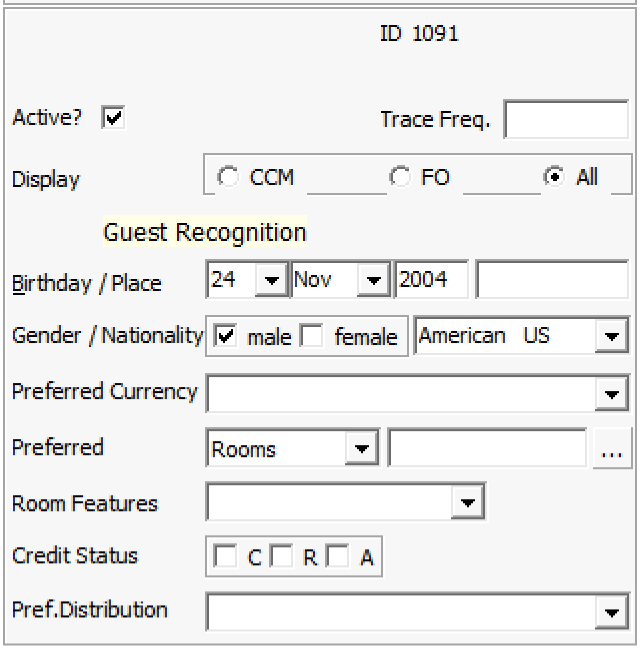
9. Close the form customization dialog boxes by clicking the  in the top right hand corner of the reservation edit screen.

   A message is displayed asking if you want to save the changes.

10. Select YES to save the changes and close all the dialog boxes.
11. Assign the screen to the required users or user groups.
12. Click CLOSE to close the Form customization screen.
    Example 1

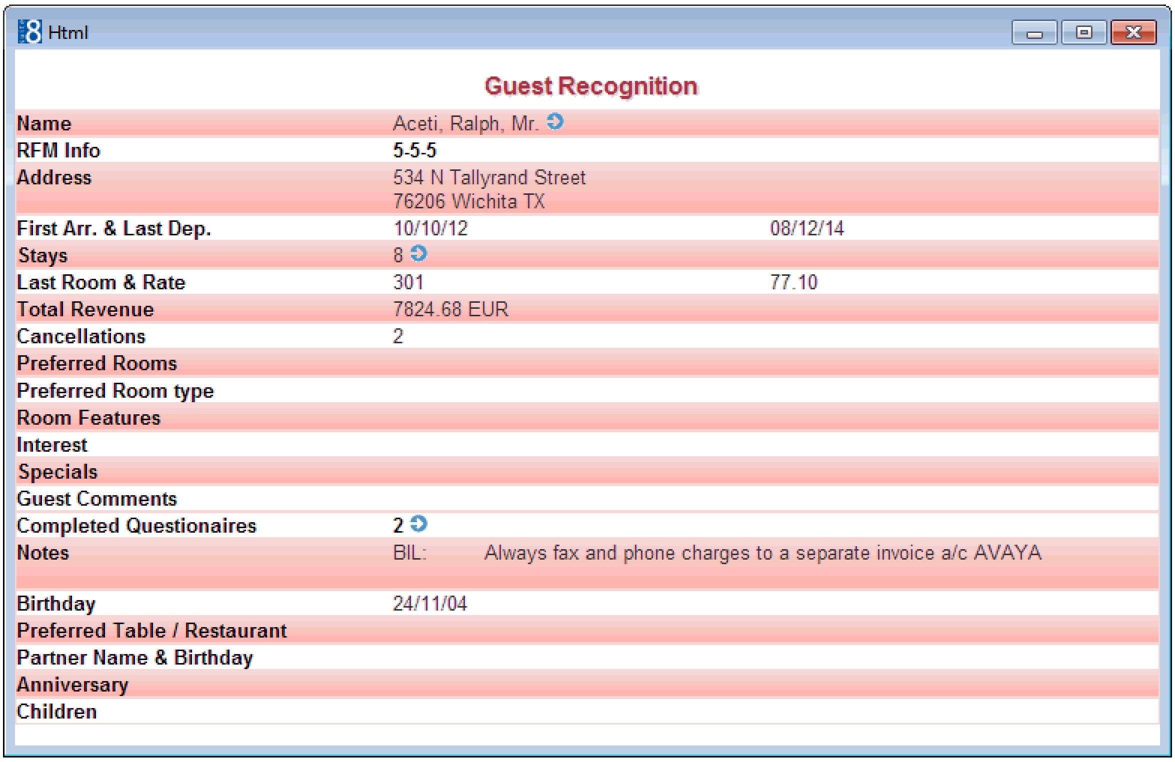
    In the following two examples the Guest Recognition link is displayed as a label on the profile edit screen.





Guest Recognition HTML display

When selecting the guest recognition link on either the reservation edit or individual profile edit, the html file is displayed:



Html

Guest Recognition

Name	Aceti, Ralph, Mr.	
RFM Info	5-5-5	
Address	534 N Tallyrand Street 76206 Wichita TX	
First Arr. & Last Dep.	10/10/12	08/12/14
Stays	8	
Last Room & Rate	301	77.10
Total Revenue	7824.68 EUR	
Cancellations	2	
Preferred Rooms		
Preferred Room type		
Room Features		
Interest		
Specials		
Guest Comments		
Completed Questionaires	2	
Notes	BIL: Always fax and phone charges to a separate invoice a/c AVAYA	
Birthday	24/11/04	
Preferred Table / Restaurant		
Partner Name & Birthday		
Anniversary		
Children		

More information on fields and procedure names used on the reservation detail

Fields and procedure names used on reservation detail

Field	Procedure name	Return value
Guarantee code	getGuaranteeCode	integer(id)
Pay Method	getdefaultpaymentdept	integer(id)
Credit Limit	getCreditLimit	floatingpointnumber
Print Rate	getPrintrate	boolean
no post	getNoPost	boolean
Room features	getLinkedRoomFeatures	variant array of variants containing yrft_id (room feature id)
Reason	getratediffreason	string
Option Date	getoptiondate	datetime
Specials	getspecials	string
Booker	This is not a regular function, please refer Getting linked profiles by category	

Getting linked profiles by category

To refer to linked profiles by category, use the following syntax:
getLinkedProfileByCategory(day: tdatetime; var name: string; var xcmsid: integer; internalcategory: TXCCAInternalCategory);
The internal category should refer to one of the following values: 1=Company, 2=TravelAgent, 3=Source, 4=Individual, 5=Vendors, 6=MeetingPlanner.
Name and xcmsid are **var** parameters; they need to be declared first.
Example:

```
var name: string;
xcmsid: integer;
procedure aftercompleted;
begin
      reservation.getLinkedProfileByCategory(reservation.getExpectedArrivalDate,name,
xcmsid,4);
   showmessage(name);
       scriptMakeVisibleIfTabsheetNotActive(self);
          end;
end;
```

Getting data which changes on a daily basis

To refer to data which changes on a daily basis, use the following syntax:getDetailDataRecord(date: tdatetime; var detailRecord: ReservationDetail);

> **Note:** detailrecord is a **var** parameter, the result is given in the variable only if it is defined first. The reservation detail is a packed record.

Fields available on the reservation detail

Field	Procedure name	Return value
Number of rooms	noofrooms	Integer
Number of adults	adultno	Integer
The room type	dispRoomType	OleVariant
Rate code Header	dispRateCodeHeader	OleVariant
Room Type used for price calculation	dispRoomTypeFor PriceCalc	OleVariant
Room number	dispRoom	OleVariant
Market Segment id	xcma_id	Integer
Source id	sourceid	Integer
Channel id	channelid	Integer
Block name	blockname	OleVariant
	ReservationDetail_ DUMMY	SYSINT
Rate amount	rateamount	OleVariant
Room Type id	ycat_id	Integer
Rate code header id	yrch_id	Integer
Block detail id	ybld_id	Integer

Group name id	ygrp_id	Integer
Group name	groupname	OleVariant
Rate difference	ratedifference	OleVariant
Rate Discount	ratediscount	OleVariant
Manual Rate Amount	manualrateamount	OleVariant
Manual Rate	ismanualrate	WordBool
Foreign Rate amount	foreignrateamount	OleVariant
Foreign Rate Difference	foreignratedifference	OleVariant
Foreign Manual Rate amount	foreignmanualrate amount	OleVariant
Share number	sharenum	Integer
Room Id	yrms_id	Integer
Block Header Id	yblh_id	Integer
Rate amount	dispRateAmount	OleVariant
Net rate amount	netamount	OleVariant
Foreign net rate amount	foreignnetamount	OleVariant
Original rate amount	originalRateAmount	OleVariant
Original foreign rate amount	originalForeign RateAmount	OleVariant
Original manual rate amount	originalManual RateAmount	OleVariant
Original manual foreign rate amount	originalManualForeign RateAmount	OleVariant
Breakfast	breakfast	OleVariant
Lunch	lunch	OleVariant
Dinner	dinner	OleVariant
Mealplan	ratemealplan	Integer
	newDetail	OleVariant
Original share number	originalSharenum	Integer
Date	date	OleVariant
Room type id for price calculation	pricecalcycatid	Integer
Free nights id	yfrnid	Integer
Rate modifier	ratemodifier	OleVariant
Foreign rate modifier	foreignRatemodifier	OleVariant
Top Line Profit validated	tlpvalidated	OleVariant

Note: The variable FOCUSCONTROL has been replaced with the variable SETFOCUS as of Fidelio Suite8.5.

Correcting customized screens

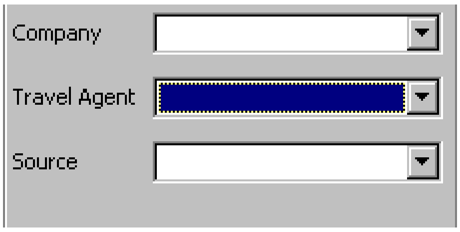
After the update from Fidelio Suite8.3 to 8.4 it is possible that the customized screens for the Reservation Edit screen are not displayed correctly and that the panels for Company/Agent/Source information and Profile details are missing. To fix this, the panels have to be moved from their original location and copied into a new panel.

The Panels on Reservation Edit Screen:

The following panels from the reservation edit screen have to be moved and copied in the steps detailed below:

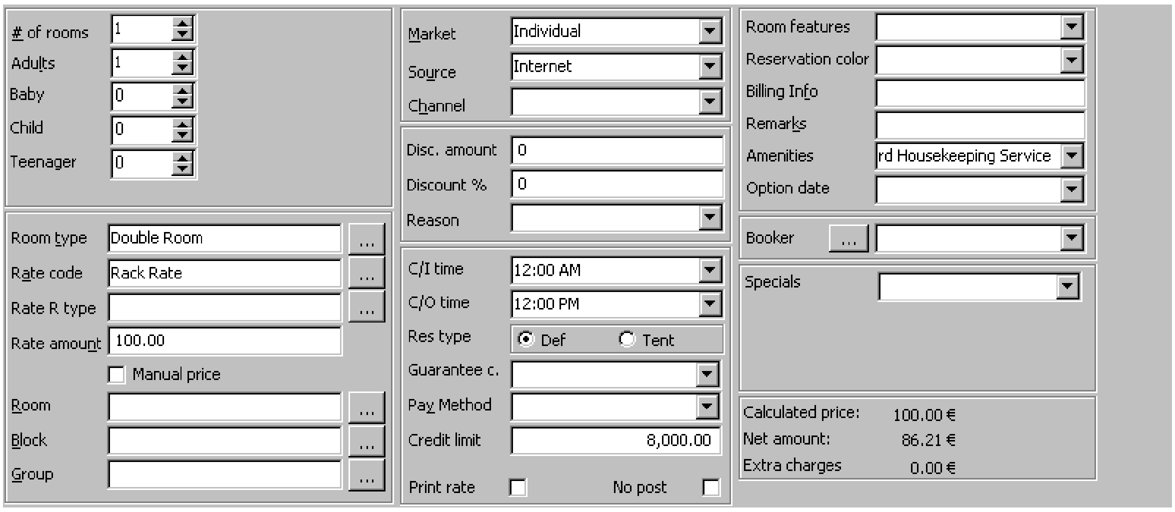
TFidResProfileDetailsPanel1

Panel1



TopPanel

DownPanel



How to open the customized screen

1. Open SETUP → MISCELLANEOUS → FORM CUSTOMIZATION.
2. Select the customized screen from the FRESEDIT customized forms that should be fixed.
3. Click the CUSTOMIZE button.

4. Open the COMPONENT PALETTE.
5. Open the OBJECT INSPECTOR.
6. Drag the FRESEDIT screen next to the OBJECT INSPECTOR and Component PALETTE so you see the Object Inspector, Component Palette and fResEdit screen together.

How to configure panels in order to move them

1. On the Object Inspector TFIDRESPROFILEDETAILSPANEL1 should be selected.

   If it is not selected, click on the upper left side of the FRESEDIT screen until TFIDRESPROFILEDETAILSPANEL1 is shown as the selected panel the Object Inspector. On the FRESEDIT screen, the border of TFIDRESPROFILEDETAILSPANEL1 should be highlighted with the black anchors.
2. On the Object Inspector, select the field ALIGN and choose Align ALNONE.
3. On the FRESEDITSCREEN with the panel TFIDRESPROFILEDETAILSPANEL1 still selected place the cursor on the middle black anchor until it changes to an up/down arrow. Drag the panel to the bottom of the screen, until the approximate size of 568 x 104 is indicated.

   The group box with the reservation detail will become available on the screen.
4. On the FRESEDITSCREEN, select PANEL1 (COMPANY/AGENT/SOURCE) on the upper right side and click the selected panel until the border is highlighted with the black anchors.
5. The Object Inspector should indicate PANEL1:TPANEL, select the field ALIGN and choose Align ALNONE.
6. On the FRESEDIT screen with the panel PANEL1 still selected, place the cursor on the middle black anchor until it changes to an up-down arrow. Drag the panel to the bottom of the screen, until the approximate size of 226 x 120 is indicated.

   The group box with the fields Room Features, Reservation Colour, Booker and Option Date will become available.
7. On the FRESEDIT screen, select the DOWN PANEL.

   (Click in the grey area next to the FidLogModifyLogLabel1 on the bottom of the FRESEDIT screen).
8. The Object Inspector should indicate PDOWN:TPANEL, select the field ALIGN and choose Align ALNONE.
9. On the FRESEDIT screen, select TOPPANEL.

   (Click in the area above the field Market Code of the FRESEDIT screen).
10. The Object Inspector should indicate PTOP:TPANEL, select the field ALIGN and choose Align ALNONE.
11. On the FRESEDIT screen, select PDOWNTPANEL again.

    (Click in FRESEDIT screen now on the light grey line above the field Room Features, until PDOWN: PANEL is indicated in the Object Inspector). The border is highlighted with the black anchors.
12. Move the whole box down until approximate size of 8,16 is indicated. The size indicator is just a reference it may differ as it depends on how the box was selected, so if it is not indicated, just move the box down.
13. Select PTOP:PANEL.

    (Click in FRESEDIT screen the upper group box containing arrival date until PTOP: PANEL is indicated in the Object Inspector)The border of the panel is highlighted with the black anchors.

14. Move the whole box down until approximate size 0,112 is indicated (above the PDOWN: PANEL that was dropped before). The size indicator is just a reference it may differ as it depends on how the box was selected, so if it is not indicated, just move the box down.

How to add a new panel

1. Select the STANDARD tab from the COMPONENT PALETTE.
2. Select a new panel by double-clicking on the PANEL button. PANEL2 will be placed in the fResEdit screen.
3. Select PANEL2, then use CTRL X to cut the panel.
4. Move the cursor above the PTOPPANEL, paste PANEL2 using Ctrl V right above the PTOPPANEL.
5. Select PANEL2 again, the Object Inspector should indicate PANEL2: TPANEL.
6. In the Object Inspector, select the field ALIGN.
7. Choose Align ALTOP.
8. Select the field CAPTION from the Object Inspector.
9. Remove the text PANEL2.
10. Select the field BVOUTER from the Object Inspector.
11. Choose BVNONE.
12. On FRESEDIT screen, drag the bottom line down until the Top Panel starts.

How to move panels to their original position (Cut and paste)

1. Select PANEL1 (Company/Agent/Source group box).
2. Use CTRL X to cut the panel.
3. Move the cursor to the upper right side into PANEL2, use CTRL V to paste the panel back to its original position.
4. Select PANEL1 again, the Object Inspector should now indicate PANEL1.
5. In Object Inspector, select the field ALIGN.
6. Choose Align ALRIGHT.
7. Select TFIDRESPROFILEDETAILSPANEL1.
8. Use CTRL X to cut the panel.
9. Move the cursor to the upper left side into PANEL2, use CTRL V to paste the panel back to its original position.
10. Select PANEL1 again, the Object Inspector should indicate PANEL1.
11. In Object Inspector, select the field ALIGN.
12. Choose Align ALRIGHT.
13. Select TFIDRESPROFILEDETAILSPANEL1 again.
14. The Object Inspector should indicate TFIDRESPROFILEDETAILSPANEL1.
15. In the Object Inspector, select the field ALIGN.
16. Choose ALIGN ALCLIENT.

Close & Verify

1. To save the screen, click the close window icon on the top right of the screen.
2. On the FORM CUSTOMIZATION dialog box select USER ASSIGNMENT.
3. Assign the corrected screen to the current user.
4. Click the CLOSE button.
5. Open the RESERVATION NAVIGATOR and EDIT a reservation to make sure the screen display is now correct.

Scripting

The scripting functionality allows experienced users to show messages, make fields mandatory and force actions by using FIDELIO EVENTS.
Script functionality uses Delphi Syntax. Running queries in form customization can use database objects, such as oracle functions.
All controls have either:

- Click Events
- Exit Events
- Change Events

Standard Events are:

- FormShow
- BeforeValidation
- BeforeSave
- AfterCompleted
- FormShow

The following objects may be used in scripting:

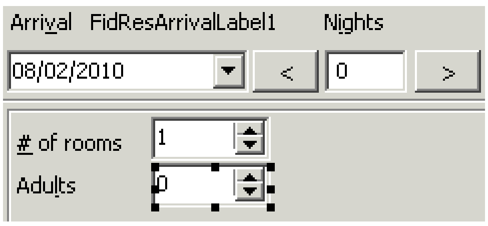
- runquerywithoutresultset for update statements
- runquerywithresultset for select statements without parameters
- runquerywithparameters for select statements with parameters

Select SQL statements return a query object.

- Data can be retrieved by calling 'fieldbyname method.'
- Navigation between rows is possible with '.next method'
- To check if the last row is reached use: 'check .eof'

How to show a message

1. Select the component from the FRESEDIT screen.



2. Select the OBJECT INSPECTOR.
3. Double-click on the field EXITEVENT under the category Fidelio and enter a name, if no name is entered, the name of the component + _EXIT will be filled automatically. For example: FIDRESADULTSSPINEDIT1_EXIT.

4. Select SCRIPT.

5. Enter the procedure entered under EXITEVENT.
Example:

```
//Show Message
Procedure AdultsWarning;
begin
   showmessage('Please enter number of Adults');
end;
```

//Show Message
Procedure AdultsWarning;
begin
  showmessage('Please enter number of Adults');
end;

How to set a default number of adults on a new reservation

The following example shows how to default the number of adults to 2 when creating a new reservation:

var d: reservationdetail;
var requestscreenrefresh: boolean;

```
procedure formshow;
begin if reservation.isnew then
begin
d:=reservation.getDetailByIndex(0);
if d.adultno<>2 then begin reservation.changeNoOfAdults(0,0,2); end;
requestscreenrefresh:= true;
end;
scriptMakeVisibleIfTabsheetNotActive(self);
end;
end;
```

How to enter long stay messages

The following example shows how to enter a long stay message:

```
var exceptiontext: string;
var abortneeded: boolean;
var waslong;
function islong: boolean;
begin
  result:=  (reservation.getexpecteddeparturedate-reservation.getexpectedarrivaldate>2);
end;
procedure datechange;
begin
  if (not waslong) and islong then showmessage('Please offer Longstay Rate');
  waslong:= islong;
end;
procedure FormShow;
begin
  waslong:= islong;
end;
```

How to make a field mandatory

To make a field mandatory:

- 2 variables EXCEPTIONTEXT and ABORTNEEDED have to be declared
- The reservation variable is always declared automatically and defines the reservation which is opened
- The variable EXPECTIONTEXT will be created after this procedure is finished and will be shown and stop the validation process
- The variable SETFOCUS refers to the name of the control (the control can be retrieved from Object Inspector → Name)

Note: Fidelio Suite8 offers saving profiles, reservations or bookings also from different tabs when editing a profile, reservation or booking. Therefore it is necessary to call a procedure within a script for mandatory fields in order to make a form (tab) visible (active) before focusing a control. The procedure is called: SCRIPTMAKEVISIBLEIFTABSHEETNOTACTIVE(self), (self) referring to the field name. This procedure will ensure that the edit tab will be the active page before focusing the control. It is necessary using this with the variable setfocus and recommended to add this procedure to all scripts for mandatory fields on the edit reservation, profiles or booking screen.

Example of how to make the field freetext1 a mandatory field

```
var exceptiontext: string;
var abortneeded: boolean;
procedure beforevalidation;
begin
   if reservation.getfreetext(1)= '' then begin
       exceptiontext:= 'Freetext 1 can not be empty';
scriptMakeVisibleIfTabsheetNotActive(FidResEditFree11);
       fidreseditfree11.setfocus;
   end;
end;
```

Example of how to make the field option date a mandatory field*var exceptiontext: string;*

```
var abortneeded: boolean;
procedure beforevalidation;
begin
if (reservation.getResStatus=0) and (reservation.getoptiondate = 0) then begin
exceptiontext:= 'Please enter Option date for tentative reservations!';
scriptMakeVisibleIfTabsheetNotActive(FidResOptionDateEdit1);
FidResOptionDateEdit1.setfocus;
end;
end;
```

Example of how to make the first name field mandatory in the individual profile screen

The following example shows how to make the first name field mandatory in the individual profile screen:

```
var exceptiontext: string;
procedure beforevalidation;
begin
if FidProfileEditFirstName1.Text='' then exceptiontext:='First Name mandatory.';
     scriptMakeVisibleIfTabsheetNotActive(self);
     FidProfileEditFirstName1.setfocus;
  end;
```

Example of how to control the field gender

The following example shows how to control if the field GENDER is filled, if it is not filled the message: 'Please enter gender' will display:

```
var exceptiontext: string;
var abortneeded: boolean;
procedure beforevalidation;
begin if (not FidProfileCheckBoxMale1.checked) and (not
FidProfileCheckBoxFemale1.checked)
then begin exceptiontext:= 'Please enter gender';
scriptMakeVisibleIfTabsheetNotActive(FidProfileCheckBoxMale1);
```

FidProfileCheckBoxMale1.setfocus;
end;
end;

Example of how to control the field division on all tabs of the company profile edit screen

The following example shows how to make the field DIVISION mandatory on the Company Profile Edit screen, even if the company profile is saved via a different tab and the field is not filled:

```
var exceptiontext: string;
var abortneeded: boolean;
procedure beforevalidation;
begin
if FidProfileEditDivision1.text= '' then begin
exceptiontext:= 'Division can not be empty';
scriptMakeVisibleIfTabsheetNotActive(FidProfileEditDivision1);
FidProfileEditDivision1.setfocus;
exit;
end;
end;
```

Example of how to make the field Function Type mandatory

The following example shows how to make the field FUNCTION TYPE mandatory on the Booking Edit Screen:

```
var exceptiontext: string;
var abortneeded: boolean;
procedure BeforeValidation;
begin
exceptiontext:='';
if FidBookingConferenceFunctionTypeCombo1.Text='' then
begin
exceptiontext:= 'Function Type is mandatory';
scriptMakeVisibleIfTabsheetNotActive(FidBookingConferenceFuctionTypeCombo1);

FidBookingConferenceFunctionTypeCombo1.SetFocus;
exit;
end;
end;
```

Example of how to make the field Booking Name mandatory

The following example shows how to make the field BOOKING NAME mandatory on the Booking Edit Screen:

```
var exceptiontext: string;
var abortneeded: boolean;
procedure BeforeValidation;
if FidBookingNameEdit1.Text='' then
begin
exceptiontext:= 'Booking Name is mandatory';
scriptMakeVisibleIfTabsheetNotActive(FidBookingNameEdit1);
FidBookingNameEdit1.SetFocus;
exit;
end;
end;
```

Example of how to make the field Booker a mandatory field if a company profile is linked to the reservation

```
var exceptiontext: string;
var abortneeded: boolean;
procedure beforevalidation;
```

```
var i: integer;
    det: reservationdetail;
    name: string;
    xcmsid: integer;
begin
  for i:= 0 to reservation.getdetailcount-1 do begin
    det:= reservation.getdetailbyindex(i);
    reservation.getlinkedprofilebycategory(det.date,name,xcmsid,1);
    if xcmsid<>0 then begin
      reservation.getlinkedprofilebycategory(det.date,name,xcmsid,4);
      if xcmsid=0 then begin
        exceptiontext:= 'Please enter booker';
ScriptMakeVisibleIfTabsheetNotActive(FidResProfileCombo1);
        FidResProfileCombo1.setfocus;
        exit;
      end;
    end;
  end;
end;
```

Note: If you are using a customized screen, the control name FIDRESPROFILECOMBO1 has to be changed to the one used on the customized screen.

Example of how to fill the field Guarantee Code with a default value

The following example shows how to fill the field GUARANTEE CODE with the default guarantee code '6 PM':procedure *beforevalidation;*

```
begin
  if reservation.getGuaranteeCode=0 then begin
    reservation.changeGuaranteeCode(1002);
  end;
end;
```

In this example '1002' is the guarantee code id for '6 PM' , the 'ygco_id' from the table YGCO.

How to fill the field infoboard with the booking name

The following scripting can be used on the field infoboard when the information from the field booking name should be transferred to the field infoboard:

```
procedure BeforeValidation;
begin
 if fidbookingconferenceinfoboardedit1.text='' then
 begin
  fidbookingconferenceinfoboardedit1.text:=fidbookingnameedit1.text;
  callcontrolmethod(fidbookingconferenceinfoboardedit1, 'StoreValue');
 end;
end;
```

How to run a query using Oracle functions

In the following example the number of adults entered on the reservation is multiplied by 10 and the result is filled in the discount amount field on the reservation edit screen.

First the function for the discount calculation has to be created by running the following statement:

```
create or replace FUNCTION getdiscount(adultno in number) return number is BEGIN
  return adultno*10;
END getdiscount;
```

Then in Fidelio Suite8 under Setup → Miscellaneous → Form Customization, the procedure "b" has to be assigned to the "exitevent" (property of the adult edit control) and the following query has to be entered as script:

```
var requestscreenrefresh: boolean;
procedure b;
var q: tfquerywrapper;
      r: ReservationDetail;
begin
  r:= reservation.getdetailbyindex(0);
  q:= database.runquerywithparameter('select getdiscount(:p) d from dual','p',r.adultno,otinteger);
  reservation.changeratedifference(0,0,-q.fieldbyname('d'),false);
  q.free;
requestscreenrefresh:= true;
end;
```

Using customized fields, which should update the field 'Discount' as soon as a value

In the following example, the field discount will be updated with '30' if the customized field is filled with 1:

```
var exceptiontext: string;
var requestscreenrefresh: boolean;
procedure testintegerexit;
begin
   if reservation.getCustomFieldByName('yrcf_testinteger')=1
   then begin
     reservation.changeRateDiscount(0,0,30);
     requestscreenrefresh:= true;
   end;
   if reservation.getCustomFieldByName('yrcf_testinteger')=0
   then begin
     reservation.changeRateDiscount(0,0,0);
     requestscreenrefresh:= true;
   end;
end;
```

How to enter string controls

Setting string controls forces the user to start or not to start text with a certain letter. In the following example the user can not start the text with 'a' for the field Freetext1:

```
var exceptiontext: string;
var abortneeded: boolean;
procedure beforevalidation;
begin
   if (FidResEditFree11.text<>'') and (copy(FidResEditFree11.text[1],1,1)='a') then begin
       exceptiontext:= 'Custom string can not begin with letter a.';
ScriptMakeVisibleIfTabsheetNotActive(FidResEditFree11);
       FidResEditFree11.setfocus;
   end;
end;
```

2 Miscellaneous

The options in the Setup Miscellaneous menu are used mainly to maintain the Fidelio Suite8 modules. In addition to licence code functionality and form customization, an option which allows custom screen painting, this section offers utilities that should only be used by the system supervisor and the Fidelio Suite8 support department. These utilities are used to fix issues in the Fidelio Suite8 database tables such as note fix, rate code order fix, reservation details fix and reservation check. It also offers tools to see SQL log files, control performance and maintain user sessions. The Setup Miscellaneous section contains some powerful features and it is important that access to this part of the menu is strictly limited.
Select MISCELLANEOUS from the Fidelio Suite8 Setup main menu to display the miscellaneous options.

Setup Miscellaneous Options

Option	Definition
License	
V8 Hotel	This option is used to enter the hotel licence code.
V8 Sublicense	This option is used to enter all the valid licence codes with the exception of the hotel licence code which is entered under the option V8 Hotel Licence.
Export	This option is used to export the V8 Hotel and Sublicenses to a file.
Import	This option is used to import the V8 Hotel and Sublicenses from a file.
System Maintenance	
Cashiering	
AR Old Balances	This option is used to enter accounts receivable balances from a different or manual system into Fidelio Suite8.
Change Credit Card Encryption key	This option is used for adding a part of the encryption but not the complete key. It can be used to re-encrypt all credit card details in the database. The whole value is not displayed to the user when decrypting credit card data manually. Other parts of the key are unique to the installation and can not be touched by a user. The manual portion of the encryption is stored encrypted and can not be returned to the user. Data can only be changed by entering a new key. The manual part of the key has to contain 12 characters.
Enter Past Revenue	This option allows entering past revenue by department code for any past period.
Recalculate Month/Year values	This option allows recalculation of statistic figures for the Manager Report, History, Budget and Revenue per day.
CCM	

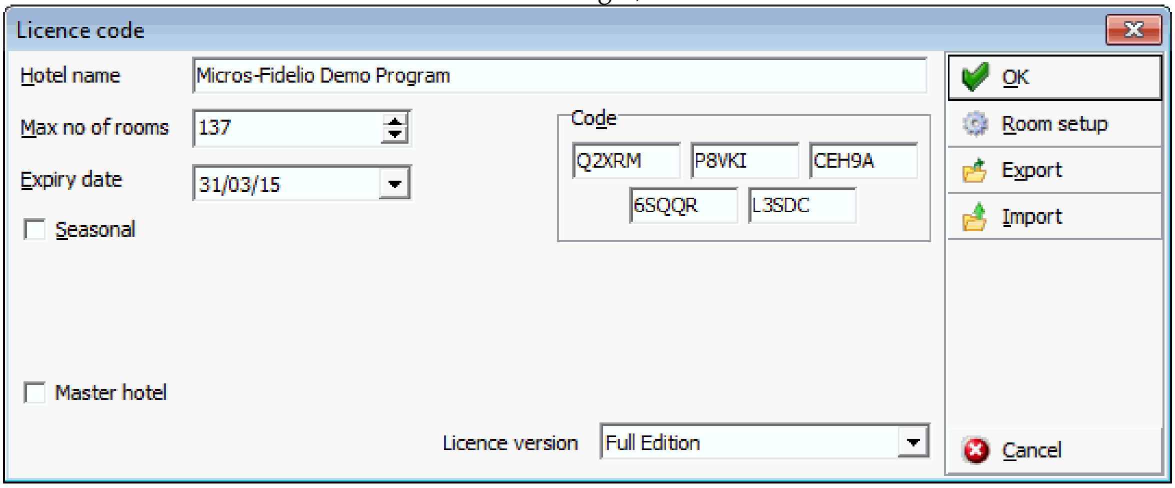
CRM	
Address Batch Validate	
Profile Import	
Replace Users	This option allows the replacing of assigned Managers on profiles, Tasks and Activities, and Bookings.
Database	
Binary Field Compression	This option allows compression of all folios, compression of folios for a specific date range and the compression of confirmation letters text.
Custom SQL statements	Select this option to run custom SQL statements on the Fidelio Suite8 tables. This option should be used by users who are familiar with the V8 table structure and experienced in SQL language.
Database Full CPU Test	
Gather database statistics	This option calls an analyzing package provided by ORACLE. This package enables better performance and response time of the ORACLE database.
ID Lookup	
Sequence Fix	The sequence fix option updates the table SEQ with the last used ID for each table.
Support SQL	This option is used to run SQL query scripts to check performance, memory, sessions, and views and to view the data dictionary view.
SQL log	This option is used to view the SQL log file queries that have been run on the database from the application.
Switch DB Resource Group	
Miscellaneous	
Apply user settings to others	
Check user rights in code	
Developer	
Interface Triggers	This option is used to view and process triggers for the interfaces. A trigger is an action causing the automatic invocation of a procedure.

Note fix	This option is used to remove special characters from the notes field. It is used after conversion or update to remove special characters.
Reset Form Position	This option may be used to resize all forms and set them back to their original screen position.
Support Check	
System Check	This option is used to run checks for contents and existence of primary keys on the Fidelio Suite8 tables.
Update IFC Error Types	
Reservation	
JetWeb Export	
Rate code order fix	The rate code order fix is used to fix the display order for rate codes attached to profiles.
Reservation Check	This option is used to search for and fix errors on reservations and reservation details.
Reservation Detail Fix	This option is required after conversion to create multiple reservation details for each reservation header depending on the entered number of nights.
Translation	
Reload Translation	
Updates	
Executable Updates	This option is used to configure an FTP connection for automatic download and/or download and install the latest executable updates for version 8.
Database Structure Update	This option is used to check the database structure after an update.
Translation	This option is used for the exchange of translated files from an FTP Server, via manual import and/or automatic download and import.
Mailing Update	This option is used to create or update only the standard mailing views and fields.
Materials Control Import	
Setting Up Materials Control	
Materials Control Import	This option is used to import outlets, run the import for all products as well as linking and unlinking products.

License

V8 Hotel License

Each Fidelio Suite8 installation requires a license code. The license code is based on the exact name of the property and the number of rooms. Based on this information, each property is issued a license code. If the name or number of rooms changes, a new license code must be obtained.



License Code dialog box

Field	Definition	Legal Values
Hotel name	Defines the property name. The information has to be entered exactly as it was requested on the license code request form.	Up to 60 alphanumeric characters.
Max no of rooms	Exact number of rooms in the property, as listed in the request for the license.	Up to 4 digits.
Expiry date	Expiration date of the license code.	Valid date from the calendar that appears in the list box.
Code	License code exactly as received.	
Seasonal	Indicates if the property opens on a seasonal basis. **Note:** Thirteen days before the license code expires, a message with the number of days the license is valid for will display and reoccur until the license code expires.	Check: YES Blank: NO
Start date	Indicates the start date of the season. This option is only available if the seasonal check box is selected.	Valid date from the calendar that appears in the list box.

	The first night audit can only be run on or after the entered start date.	
Number of days	Defines the number of days in the season. This option is only available if the seasonal check box is selected. This controls how many night audits can be run. If the number of days has elapsed then no more night audits can be run. **Note:** Selecting ABOUT (Ctrl + Shift + Q) from the Help menu displays the date the license starts and expires, as well as the number of days left until expiration.	Up to 3 digits.
Master Hotel	Defines the master hotel when Suite8 Central is activated and controls the records from the connected partner hotels.	Check: YES Blank: NO
Partner Hotels	Defines the number of partner hotels	

From the V8 Hotel licence screen the following options are available:

- Room Setup - to access the room's configuration.
- Export - to create a license export file.
- Import - to import a license import file.

Note: If the license code is imported from an XML file, the import has to be made on V8 Hotel and on V8 Sublicenses.

Note: A separate Master Hotel License can be obtained for properties using a Head Quarter as 'Master' where no PMS or CCM license is activated.

V8 Sublicenses

This option is used to enter and edit all additional licenses as follows:

- Main sublicenses

  PMS
  CCM

- Customer relation management

  Synchronize Applications (Outlook)

- Property management

  Blocks
  Leisure Module
  Travel Agent Processing
  Accounts Receivables
  Back Office IFC
  Membership Rebate Handling up to 5000 Active Cards
  Membership Rebate Handling more than 5000 Active Cards
  Table Reservations
  Voucher Management
  Ticketing

- Conference and catering management

  Billing Component
  Room Planer

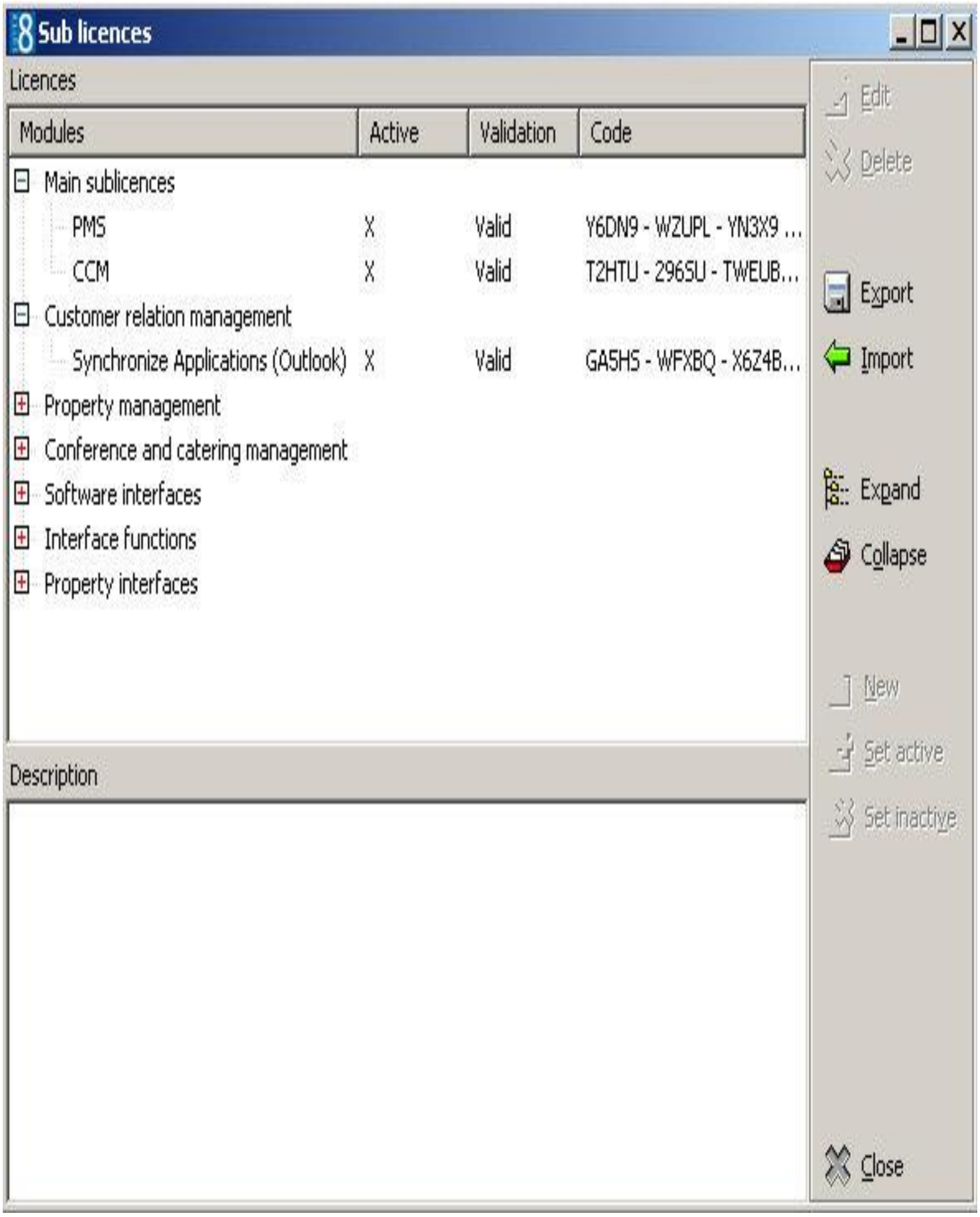
- Software interfaces

  TLP Yield Interface
  CRS ONE WAY - IDEAL
  CRS ONE WAY - Pegasus
  CRS ONE WAY - SunWing/MyTravel
  CRS ONE WAY - TRUST
  CRS ONE WAY - myfidelio_net
  Myfidelio Homepage
  VariBon Redemption Interface
  Hotel Connector Profiles And Statistics
  Hotel Connector Cross Reservations and Availability
  CCM Info Board Interface
  MyCCM Homepage
  XML Interface Standard Edition
  XML Interface Enhanced Edition
  XML Interface for Varibon/VariTable/JetWeb
  V8 CRM Address Doctor Integration Interface
  CRS ONE WAY - HILTON
  CRS ONE WAY - MFNET ORS
  CRS TWO WAY - MFNET ORS
  CRS ONE WAY - MAGIC LIFE
  CRS TWO WAY - MAGIC LIFE
  CRS ONE WAY - TISCOVER
  CRS TWO WAY - TISCOVER
  Materials Control Interface
  Kiosk Interface
  HIS Interface
  Hurdle Rates XML Interface
  TAC Voucher Redemtion Interface
  JetWeb Interface
  V8 Mobile Status

- Interface functions

    Bill View
    Check In/Out
    Credit Card Handling
    Enhanced Posting
    Full Call Accounting
    Key Service System
    Partial Call Accounting
    POS Check Detail Transfer
    Remote Check-Out
    Simple Posting
    Text Message Handling
    Virtual Numbers
    Voicemail Handling
    Wakeup Call Handling

- Property interfaces



Sublicense dialog box

Field	Definition	Legal Values
Name	Description of the license.	View only
Code	License code exactly as received.	
Active	Indicates if the license for the Interface function is active or not.	Check: Active Blank: Inactive

The following options are available from the sublicense dialog box:

Option	Does this
Edit	Edits the sub-license or change the active status.

Delete	Deletes the selected sublicense.
Export	Used to create a License Export file.
Import	Used to import a License Import file.
Expand	Expands the list of licenses
Collapse	Collapses the list of licenses
New	Used to enter a new sublicense.
Set active	Activates the license.
Set inactive	Deactivate the license.

Export

This option is used to create a license export file.

Import

The license import option allows for the import of the licence code.

System Maintenance

The system maintenance options should only be used when advised by Fidelio Suite8 support, or when using options from special interfaces, such as Jetweb or address doctor. Most options consist of utilities to fix inconsistencies in the Fidelio Suite8 tables and utilities to run after conversion of data.

Cashiering

AR Old Balances

This option is used to enter accounts receivable balances from a different or manual system into Fidelio Suite8.

How to enter old balances

1. Click AR OLD BALANCES to open the Accounts Navigator.
2. Select either an existing Accounts Receivable Account or create a new Account.
3. Select the date of the invoice from the calendar
4. Select an aging period.
5. Enter the invoice number
6. Enter the original amount of the invoice.
7. Enter the total payments received for the invoice.
8. Leave the guest name or enter a comment next to the guest name
9. If reminder letters were sent, select the Reminder letter which was sent last

A/R Old Balance dialog box

Field	Definition
A/R Account Number/Name	View only fields
Date	The invoice date or the date when the aging period should start. The date can only be past or today. Enter either a date or an aging period.
Aging Periods	Defines the aging period for the entered amount. If a date was entered before it will be changed according to the selected aging period.
Invoice #	The invoice number
Amount	The original amount of the invoice.
Paid	The total payments received for the invoice.
Open Balance	This field is calculated: Amount - Paid.
Guest Name	The name of the guest and invoice number, additional information can be added next to the guest name
Reminder Sent	The reminder letter last sent for this invoice can be selected from list box

The entering of accounts receivable old balances is controlled by the user rights Enter Old Balances under Setup → Configuration → Users → User Definition → Rights → Accounts Receivable.

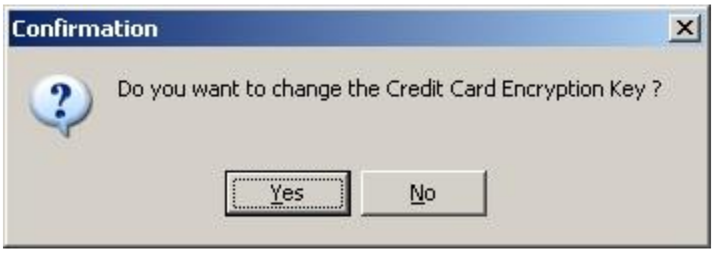
Change Credit Card Encryption Key

This option is used for adding a part of the encryption but not the complete key. It can be used to re-encrypt all credit card details in the database. The whole value is not displayed to the user when decrypting credit card data manually. Other parts of the key are unique to the installation and can not be touched by a user. The manual portion of the encryption is stored encrypted and can not be returned to the user. Data can only be changed by entering a new key. The manual part of the key has to contain 12 characters.

How to decrypt credit card keys

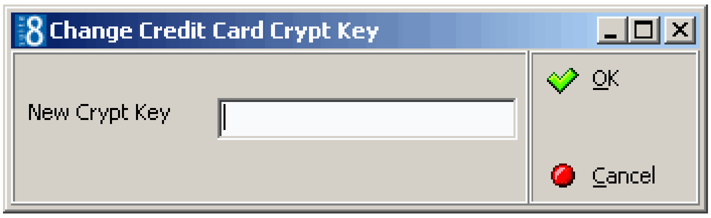
1. Click Setup Miscellaneous, System Maintenance, Cashiering
2. Select Change Credit Card Crypt key

   A message is displayed asking you if you want to change the encryption



3. Click Yes.

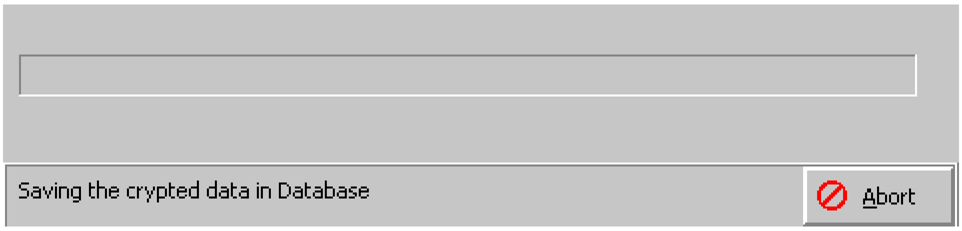
   The New Credit Card Encryption Key dialog box is displayed.



The existing key is not displayed to the user.
Only part of the encryption is entered, the manual portion of the key is stored encrypted and can not be returned to the user. The data can only be changed by entering a new key.

4. When entering a new key, it has to contain 12 characters.

5. Click OK
6. The data is encrypted and saved in the database.



7. A message is displayed when the encrypting is complete with the number of credit cards encrypted.

Enter Past Revenue

This option allows entering past revenue by department code for any past period. This would be used when starting with Fidelio Suite8 and the revenue from another system should be taken over for past periods.

How to enter past revenue

1. Enter the year for the past period in the YEAR field.
2. Select the DEPT CODES to view from the list box of defined department codes
3. Select a row from the department code list to enter past revenue

4. Enter the amount or use the calculator to calculate gross or net amounts.
5. There are 4 options for transferring the amount:

   Click the <Gross button to transfer the amount to the gross cells of the selected department code.

   Click the <Net button to transfer the amount to the net revenue cells of the selected department code

   Click the <Cell button to transfer an amount to a selected cell.

   Click the <Row button to transfer an amount to all cells in a row.
6. Click the Save button to save entries.

   A screen displaying the update progress is displayed.
7. Click the Close button to close the screen without saving

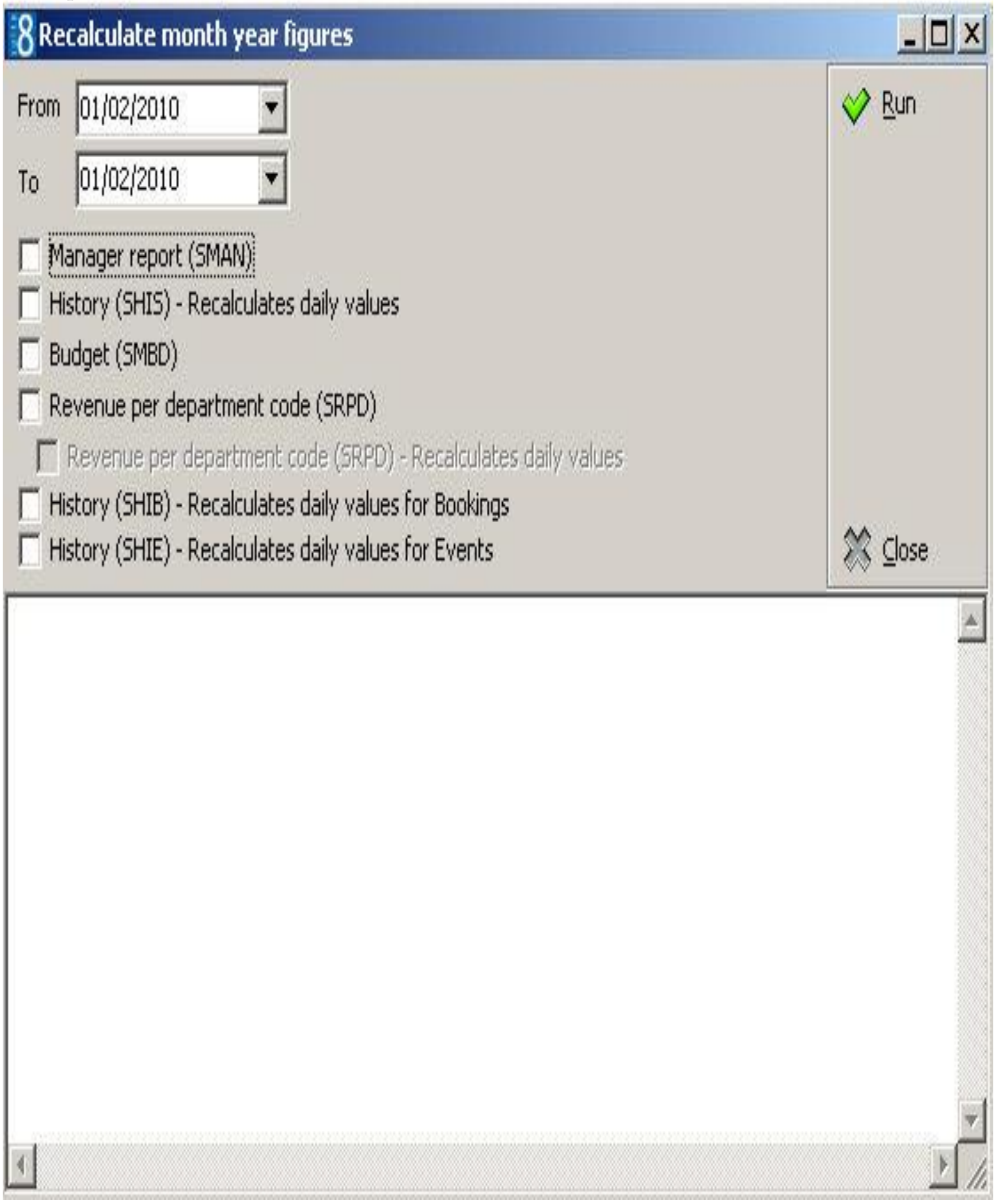
> **Note:** The first date found with a posting will display in blue, this is usually the Fidelio Suite8 start date. All the following cells will display in red, all entries in these cells will not be saved when pressing Save button as the actual posted revenue will remain in the table

Past revenue dialog box

Field	Definition
Year	Select the year for which past revenue should be entered.
Dept Code(s)	Select the department code(s) for which past revenue should be entered.
<Cell	Select this button to copy the entered amount to the selected cell.
<Row	Select this button to copy the entered amount to the selected row.
<Gross	Select this button to copy the entered amount to all Gross amount cells of the selected row.
<Net	Select this button to copy the entered amount to all Gross amount cells of the selected row.
Save	Press the save button to save entries.
Close	Press the close button to close the screen without saving.

Recalculate Month/Year values

This option is used to recalculate various statistics.



The statistic figures that can be recalculated are as follows:

- Manager Report (SMAN) - all history values used for the manager report.
- History (SHIS) - this option recalculates daily values for the history statistics. Missing daily records will be added. The daily records will be recalculated from the reservation file.
- Budget (SMBD) - this option recalculates month and year values for the manager report budget.
- Revenue per department code (SRPD) - this option recalculates month and year values for the revenue statistics per day.
- Revenue per department code (SRPD) - this option recalculates daily values for the revenue statistics per day. Missing daily records will be added.

- History (SHIB, SHIE) - Recalculates bookings and events daily values - this option recalculates daily values for the history statistics for CCM Bookings (SHIB) and CCM Events (SHIE). Missing daily records will be added.

How to recalculate month and year figures

1. Click RECALCULATE MONTH YEAR FIGURES from the setup miscellaneous drop-down menu.
2. Select a FROM and TO date for the calculation from the calendar.
3. Select all or one of the statistic files to calculate.
4. Click the RUN button.

> **Note:** Since Fidelio Suite8 Version 8.9.0.3, the fields: 'ZPOS_ORIGINATED_YRES' and 'ZPOS_ORIGINATED_ZFAC_ID' are filled with NULL instead of 0 if no 'ID' is linked. This has been changed to enhance the response time when selecting information from the table ZPOS. However, this change was not announced and the view used for the financial accounts History Statistics calculation in: SHIS was not adapted. Properties already running Fidelio Suite8 Version 8.9. are strongly recommended to run a recalculation on the History (SHIS) file. In addition, all custom views should be checked. (This note is relevant as of release 8.9.0.2.)

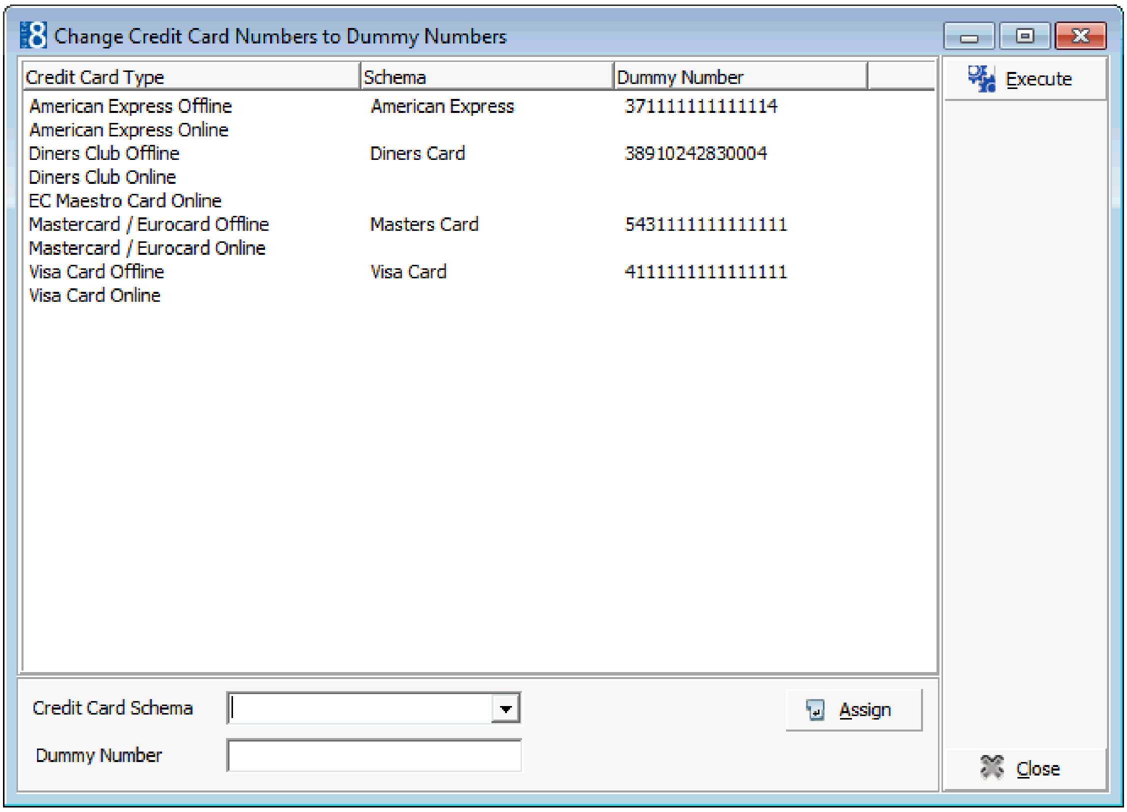
Change Credit Card Numbers to Dummy Numbers

This option should be used in Fidelio Suite8 demo or training systems to make sure that all credit card numbers used in the training or demo system are dummy numbers and to avoid fraud. This option must be run when live-data from a hotel is imported for testing purposes, so that any stored numbers are eliminated.
The user log CHANGE CREDIT CARD NUMBERS TO DUMMY NUMBERS must be activated in the training or demo system as well as in the live system to record each time the credit card number conversion is launched and to prove that the PCI - Payment Card Industry Data Security standards have been implemented.

> **Note:** When executing this option all credit card data will be replaced with test numbers and all passport, drivers license and date of birth details will be deleted.

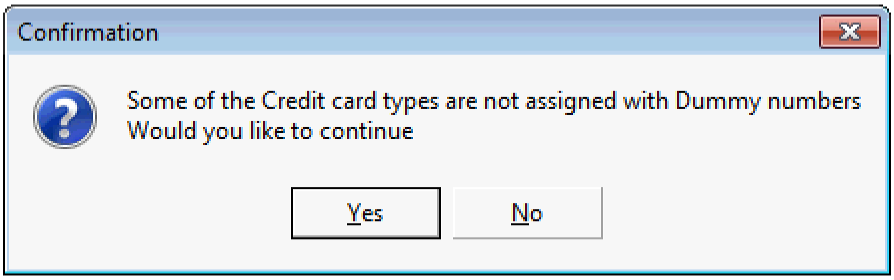
How to change credit card numbers to dummy numbers

1. On the SETUP menu click MISCELLANEOUS and then select SYSTEM MAINTENANCE.
2. On the System Maintenance menu click CASHIERING and then click CHANGE CREDIT CARD NUMBER TO DUMMY NUMBERS.



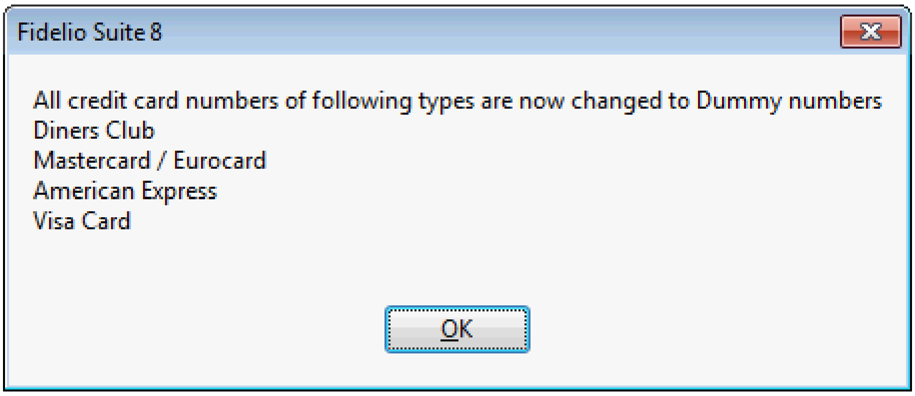
3. To assign a dummy number select the CREDIT CARD SCHEMA, if the schema is already known then the DUMMY NUMBER is completed automatically, otherwise enter the dummy number.
4. Click ASSIGN to allocate the dummy number to the schema.
5. To run the credit card number replacement click EXECUTE.

   If not all cards have been linked, the following message will be displayed "Some of the Credit card types are not assigned with Dummy numbers. Would you like to continue"



6. Click YES to continue or NO to return and complete the missing dummy credit card numbers.

   A message is displayed when the conversion is complete with a list of the credit card types whose numbers have been changed to dummy numbers.



7. Click OK to close the message and then click CLOSE to exit.

Changes are displayed in the user log if the option Change Credit Card Numbers to Dummy Numbers is selected in Setup → Configuration → Users → User Log → Application and users.

CRM

Addresses Batch Validate

This option is used with the address doctor integration interface. It allows validation of all addresses in a batch. An URL address has to be defined under Batch URL in Global Settings → Profile 2 tab.

Addresses Batch Validate dialog box

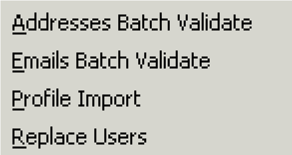
Field	Definition
Not validated	The number of addresses not validated
Valid	The number of valid addresses. Addresses which have been validated by address doctor
To be manually validated	The number of addresses which need to be validated manually. When running manual address validation, the process is interrupted and allows selection of the correct address
Not valid	The number of addresses not valid. These addresses can not be validated because of missing information
Available Buttons	
Start	Press this button to activate batch validation process
Run manual	Press this button to run batch validation manually, the batch stops and allows selection of valid addresses for addresses which are not unique. This option should run if the field TO BE MANUALLY VALIDATED is not 0
Stop	Press this button to stop batch validation

Emails Batch Validate

This option is used to validate all the profile email address's.

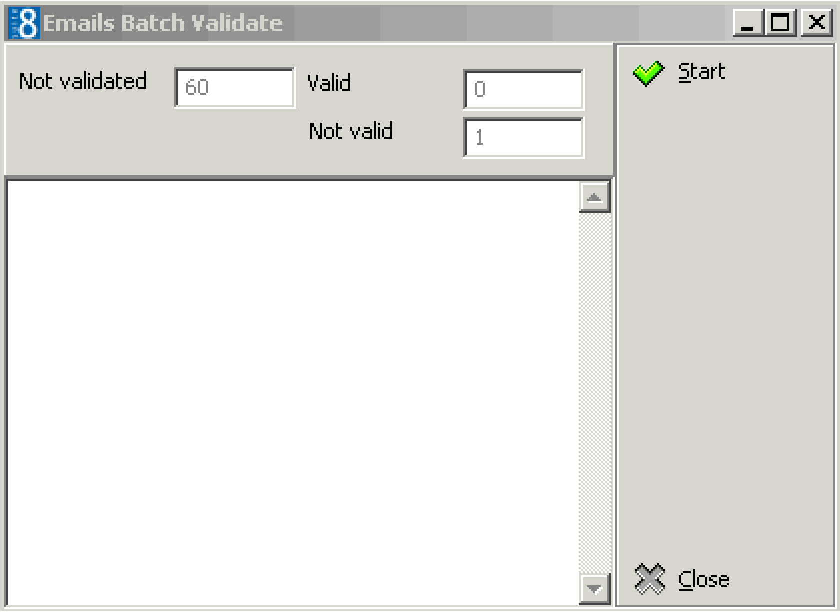
How to run Email Batch Validate

1. Click MISCELLANEOUS from the SETUP drop-down menu and then SYSTEM MAINTENANCE.
2. On the System Maintenance menu click CRM.

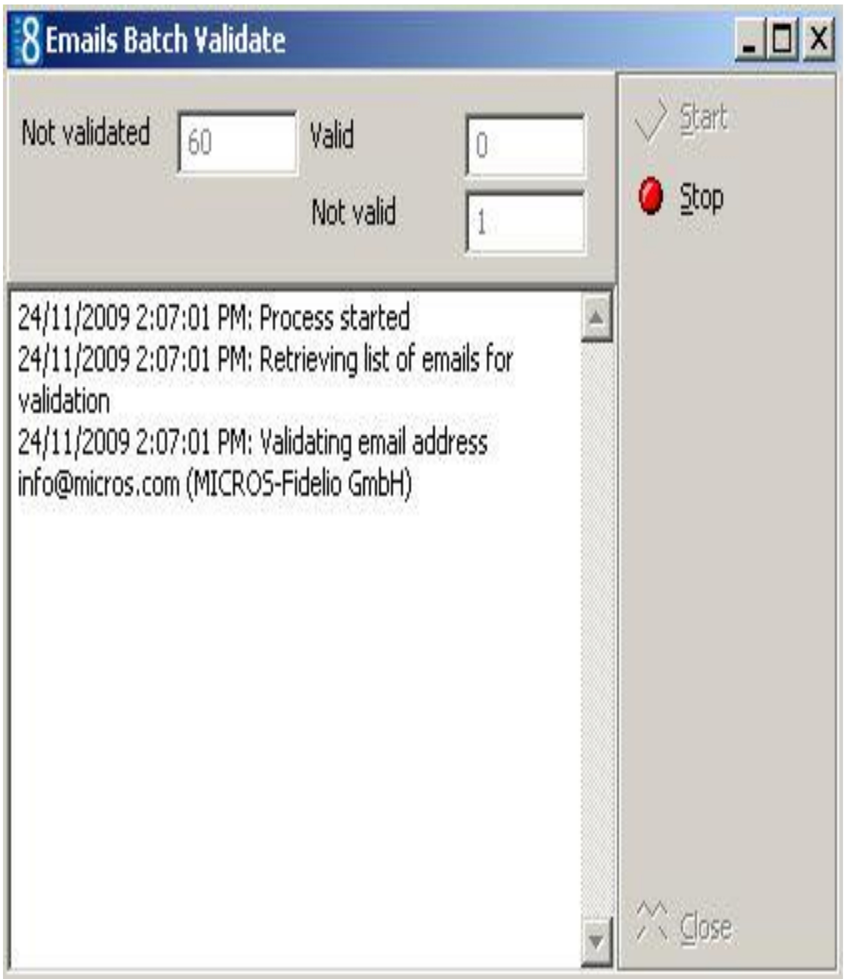


3. Click EMAILS BATCH VALIDATE on the CRM menu to display the Emails Batch Validate dialog box.

   The number of NOT VALIDATED, VALID and NOT VALID email addresses are displayed.



4. Click START to start the validation process.



5. Click CLOSE to close the dialog box.

> **Note:** The procedure will stop if, for example, invalid text such as a telephone number has been entered in the email communication type.

Profile Import

This option is used for inserting profile data based on Excel files into the Suite8 Database and with this information creating profiles for Individuals and Companies.
For tracking the imported profiles, it is recommended using a dedicated user when importing.
Before importing, please make sure that the information on the Excel worksheets is split into 2 groups:

- Individual profiles (XCCA_XCMSTYPE=2)
- Company profiles (XCCA_XCMSTYPE=1)

Verify the contents of the columns on the Excel worksheet.
The Profile Import dialog box is split into two tabs:

- Import - used for entering the user name and password, selecting the file for the import and defining the type of profile import, such as individual profiles or company profiles as well as assigning the membership, address and communication types for imported profiles
- Excel Setup - used for configuring the table contents and assigning the worksheet columns to the corresponding Profile Fields

Profile Import dialog box

Field	Definition
Username	The user name for the profile import
Password	The password for the user
Filename	Select the file for the import from a path
Individual Profiles	Select this option to import individual profiles
Company Profiles	Select this option to import company profiles
Profile Type (Companies only)	Available if Company Profile import is used. Allows selecting the defined profile types for companies
Profile Type for Contacts (Companies only)	Available if Company Profile import is used. Allows selecting the configured profile types for contacts.
Membership Type 1-3	Allows selecting configured membership types, used to link the corresponding membership type
Telephone Type 1-3	Allows selecting configured communication types for linking the telephone type
Email	Allows selecting configured communication types for email for linking the email address
Homepage Type	Allows selecting configured communication types for WEB
Address Type	Allows selecting the defined address type used for linking the address to the corresponding address type
Try to merge	If selected and a profile with the same information is found, it is merged
Halt on error	If selected the import process is stopped and an error message is displayed

Excel Setup Tab

On the Excel Setup tab, on the left side, the fields from the profile tables are displayed and the corresponding Excel columns where the information for the V8 field is located can be selected from a list. Fields for which no information is available on the Excel worksheet can be left empty, however a warning message will display when starting the import and fields not assigned. On the right side the configured marketing information of Fidelio Suite8 is displayed and the corresponding Excel column can be entered. The row number of the Excel Worksheet where the actual contents starts and reading of data should begin is entered in the field Start Import at Row. Once the information is entered, this setup can be saved by pressing SAVE button, an INI file is then stored on the directory selected on the import tab. To load already configured setup files, press the LOAD button. Pressing CLEAR, removes all information.
When the import is completed, the number of profiles is displayed on the upper right side.

XML Interface has to be installed

The address where the XML Interface is running has to be entered in the field XML IFC URL under Setup → Configuration → Global Settings → Profile → Profile 1 tab.

Replace Users

This option is used to replace assigned managers on:

- Profiles - On the profile edit screen the SALES MANAGER field is indicated with P and under the LINKED PROFILES tab the linked employees are indicated with an A on the search result grid.
- Task & Activities
- Bookings

Available Options

Depending on the selected option, different search criteria can be entered.

- To activate the search, click SEARCH.
- To replace all profiles, task & activities or bookings on the search result grid with the NEW MANAGER, click REPLACE ALL.
- To replace selected profiles, task & activities or bookings, select the profiles, task & activities or bookings to be replaced and click REPLACE SELECTED.

Profiles Search dialog box

Field	Definition
Country	If the replacement should be valid for specific countries, select a country from list box
Zip Code From	Enter a zip code from which the search should start
To	Enter a zip code until which the search should end
Current Manager	Select the current Manager from list box
New Manager	Select the new Manager from list box
Type	Select the Type of Profile, from the list box of defined profile types, such as Individual, Company
Status	Select the status of the profile by selecting a radio button.
Active	Only Profiles marked as Active
Inactive	Only Profiles marked as Inactive
All	Active and Inactive Profiles
Unassigned Profiles only	Select this box, to view only unassigned profiles and assign a Sales Manager

Task & Activities Search dialog box

Field	Definition
Start Date From	If the replacement should be valid for specific countries, select a country from list box
Start Date To	Enter a zip code from which the search should start
Current Manager	Select the current Manager from list box
New Manager	Select the new Manager from list box

Status	Select the tasks & activities status by selecting a radio button.
Completed	Only completed Tasks & Activities
Not Completed	Only not completed Tasks & Activities
All	Completed and not completed Tasks & Activities

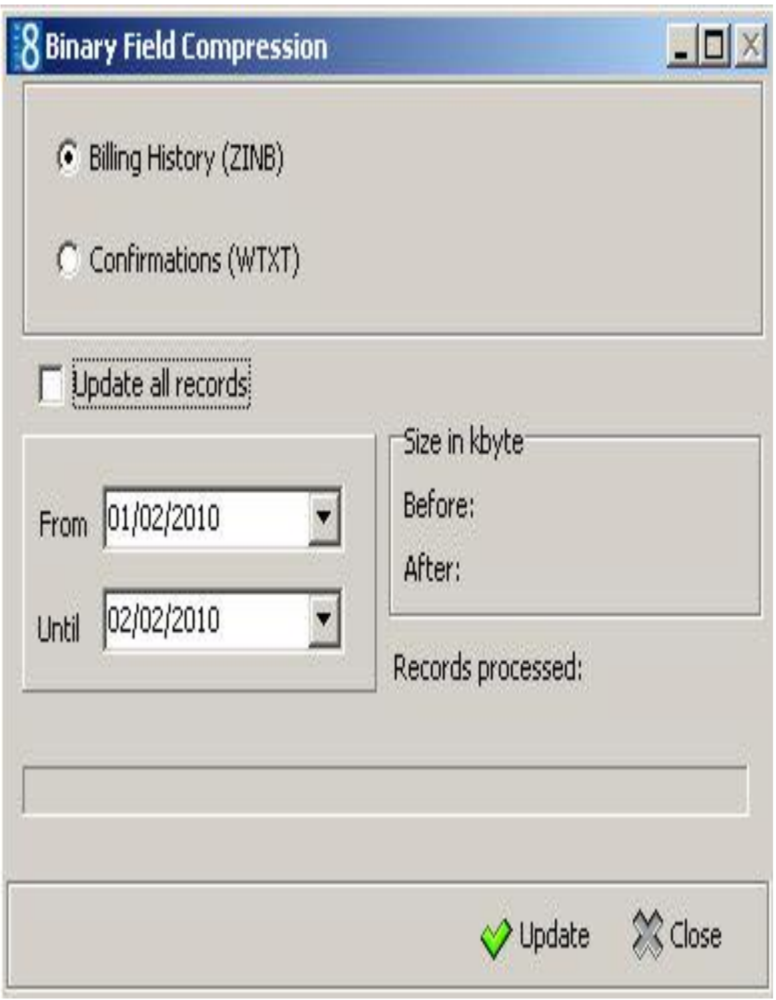
Bookings dialog box

Field	Definition
Arrival Date From	Select an arrival date from which the search should start.
Arrival Date To	Enter an arrival date until which the search should end.
Conference Status	Select a status from the list box, such as definite or tentative.
Rooms Status	Select a status from the list box.
Current Manager	Select the current Manager from list box.
New Manager	Select the new Manager from list box.
Manager Type	Select the manager type, multiple selections are allowed.
Conference	Conference Manager.
Rooms	Rooms Manager.
Accounts	Accounts Manager.

Database

Binary Field Compression

This option allows compression of all folios, compression of folios for a specific date range and the compression of confirmation letters text. The storing of folios and confirmation letters takes up a lot of space in the database, therefore this functionality has been introduced to keep and maintain clean databases. In addition the compression of folios created with the internal editor functionality is now standard during check out, therefore compression is only required for all folios printed before installation of Fidelio Suite8.5.0.8.
During and upon completion of the compression procedure the size in Kbyte is displayed before and after and the number of records processed is listed.



Note: At the moment the billing history compression functionality is only available for invoices created with Internal Editor (RTF templates). In addition, the menu option is not available when running V8 in debug mode.

Binary Field Compression dialog box

Field	Definition
Billing History (ZINB)	Select this option to compress invoices created with the Internal Editor (RTF templates).
Confirmations (WTXT)	Select this option to compress confirmation letter text.
Update all records	Defines if all records found in billing history will be compressed. If selected, no date range needs to be defined.
From	Enter a date from which the folios should be compressed.
Until	Enter a date until which the folios should be compressed
Update	Starts the compression procedure.
Close	Exits the Binary Field Compression option.

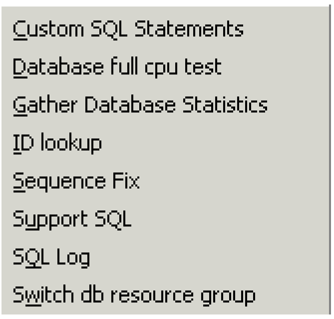
Custom SQL statements

Select this option to run or create custom SQL statements on the Fidelio Suite8 tables. This option should be used by users who are familiar with the table structure of Fidelio Suite8 and are experienced in SQL language. To enter statements a group needs to be defined and a role assigned to the SQL group. All statements are listed when entering. Defined Custom SQL Statements can also be used in the advance query on Reservation, Profile and Room Search if the corresponding role is assigned. If no custom SQL should be used on a search dialog box, the role has to be removed from the SQL group. If the custom SQL statement is used to run on the Custom SQL View dialog box from the Miscellaneous drop down menu, the role **Custom SQL grid** is assigned. The Custom SQL definition consists of four configuration parts:

- THE SQL TEXT
- PARAMETERS for defining user input parameters
- COLUMNS for defining columns for the SQL View
- SETTINGS for defining a HTML file name and HTML id field

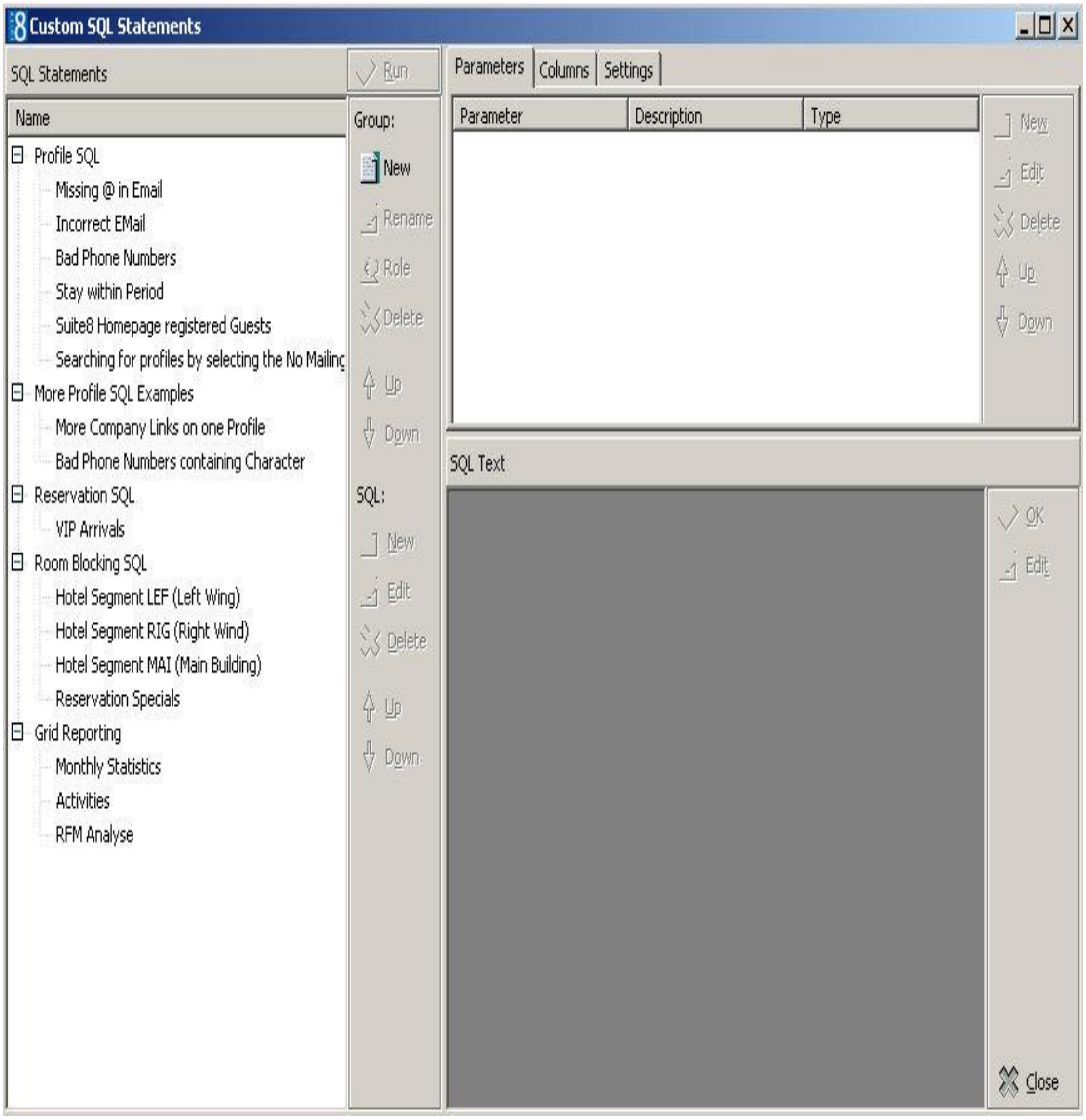
How to create a custom SQL group

1. Click MISCELLANEOUS from the SETUP drop-down menu and then SYSTEM MAINTENANCE.
2. On the System Maintenance menu click DATABASE.



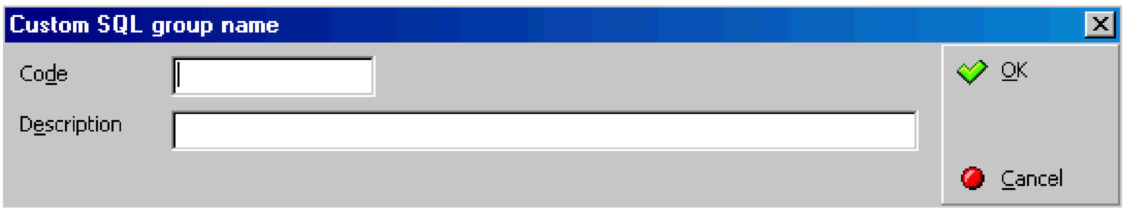
3. Click CUSTOM SQL STATEMENTS on the Database menu to display the Custom SQL statements dialog box.

> **Note:** A Custom SQL group must be created before any custom SQL statements can be created.

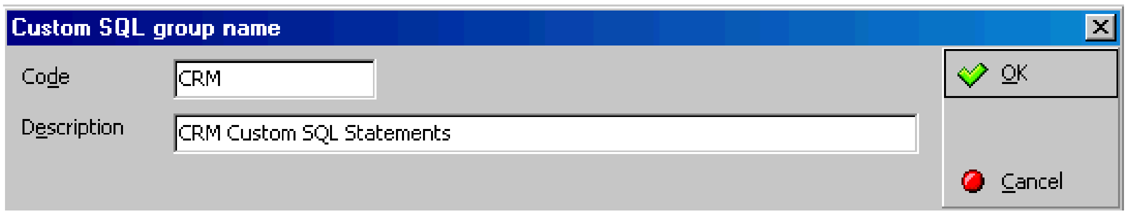


4. Place the cursor in the SQL Statements panel on the left-hand side of the screen and right-click to display the short-cut menu.

5. Click NEW GROUP on the shortcut menu to display the Custom SQL group name dialog box.



6. In the Code box enter a code for the SQL group, up to five alphanumeric characters is allowed.
7. In the Description box, enter the description of the SQL group.



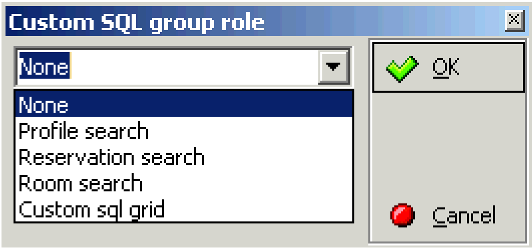
8. Click OK to save the SQL Group.

How to link a role to a custom SQL group

1. Click Miscellaneous from the Setup drop-down menu and then System Maintenance.
2. On the System Maintenance menu click Database
3. Click Custom SQL statements on the Database menu to display the Custom SQL statements dialog box.

> **Note:** A Custom SQL group must be created before any custom SQL statements can be created.

4. Select the required SQL Group from the SQL Statements panel on the left-hand side of the screen.
5. Click the Role button.



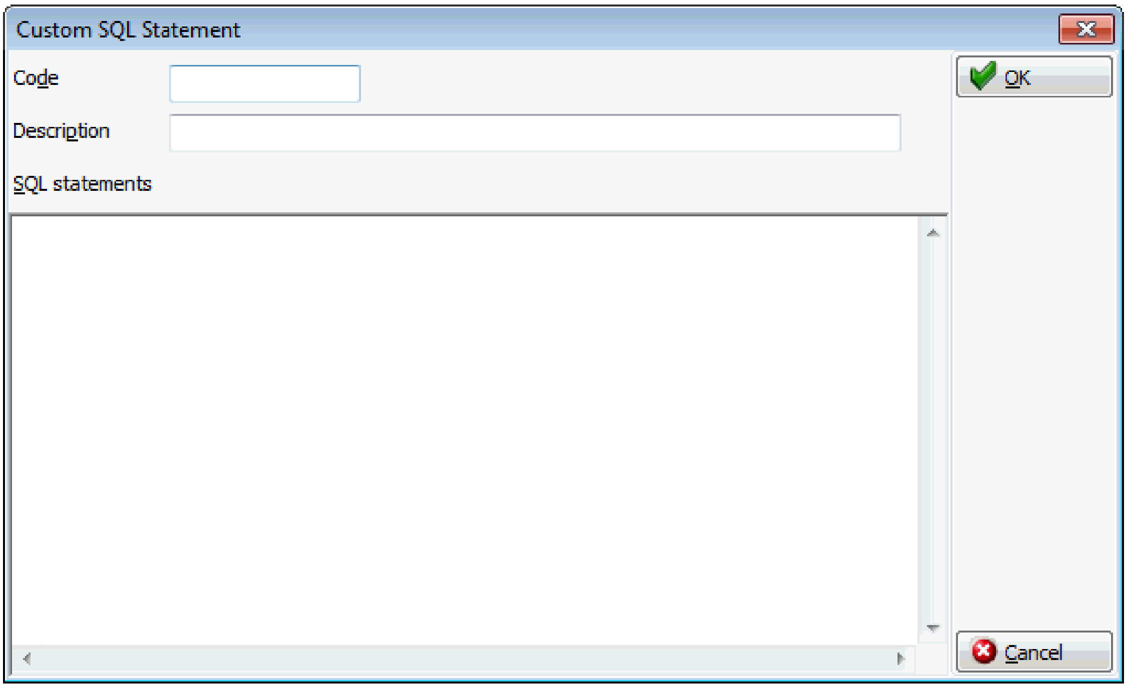
6. Select where in the application the statements from the selected group should be available: Profile search, Reservation search, Room search or on the Custom SQL grid.
7. Click OK to save the SQL Group Role assignment.

How to create a custom SQL statement

1. Click Miscellaneous from the Setup drop-down menu and then System Maintenance.
2. On the System Maintenance menu click Database.
3. Click Custom SQL statements on the Database menu to display the Custom SQL statements dialog box.

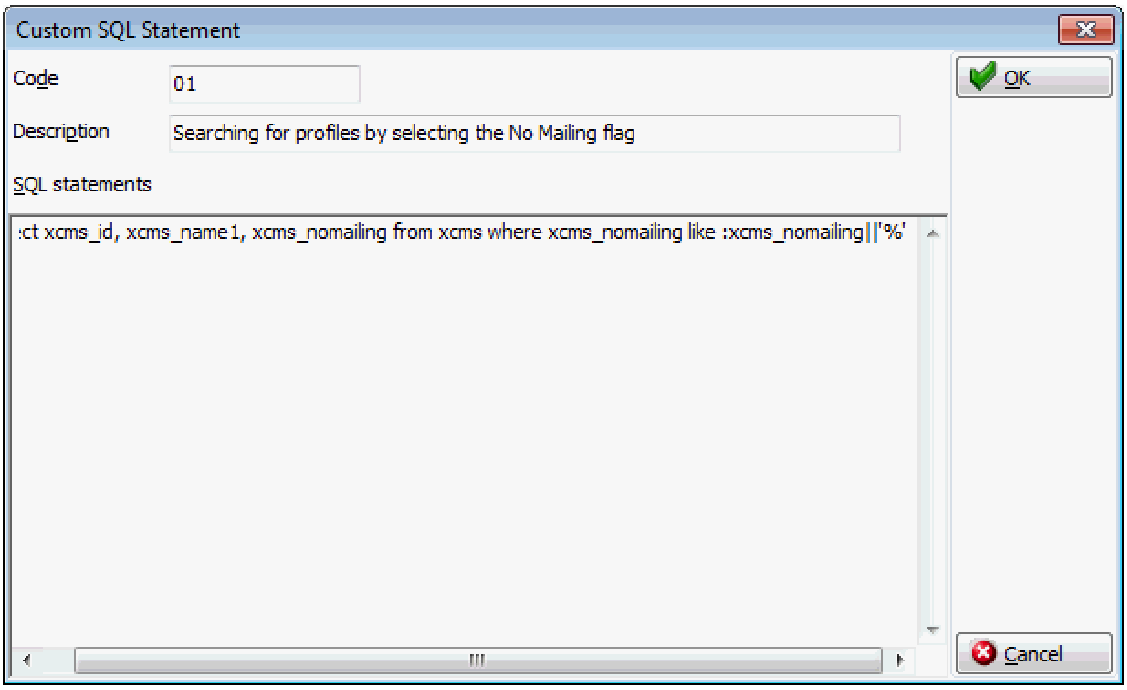
> **Note:** A Custom SQL group must be created before any custom SQL statements can be created.

4. Select the required SQL Statements group from the panel on the left-hand side of the screen and click New on lower SQL panel to display the Custom SQL Statement dialog box.

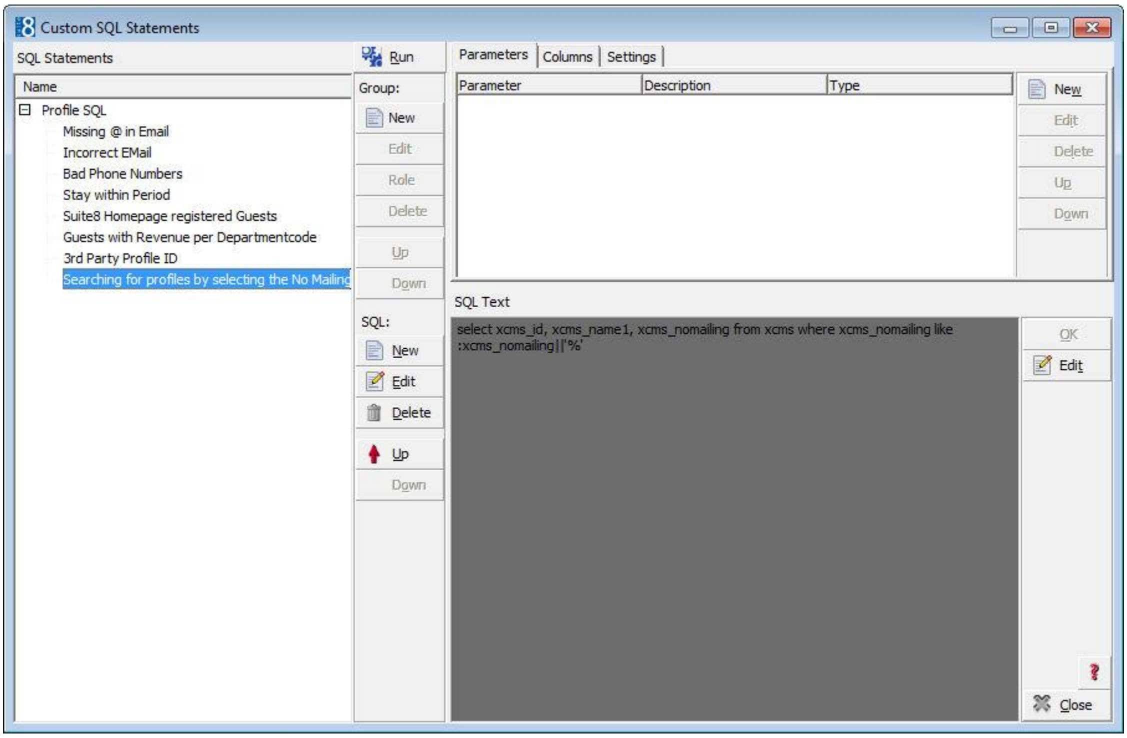


5. In the Code box enter a code for the SQL statement, for example Prof.
6. In the Description box, enter the description of the SQL statement, for example Searching for profiles by selecting the No Mailing flag.
7. In the SQL Statements panel enter the SQL statement, for example:

   select xcms_id, xcms_name1, xcms_nomailing from xcms where xcms_nomailing like :xcms_nomailing||'%'

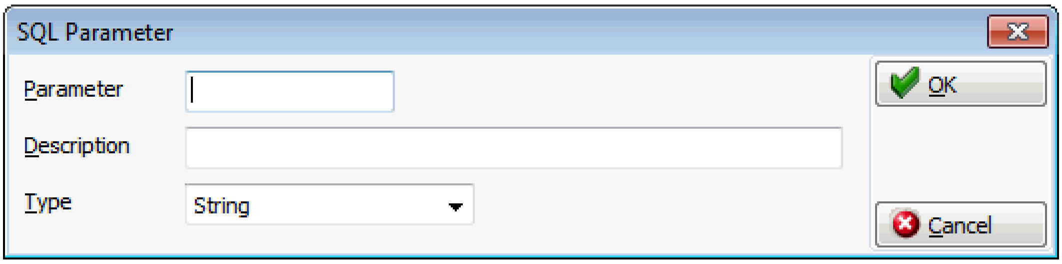


8. Click OK, the custom SQL statement is listed in the SQL statements panel.
9. Selecting the statement description displays the SQL statement in the SQL text panel in the lower right-hand side.



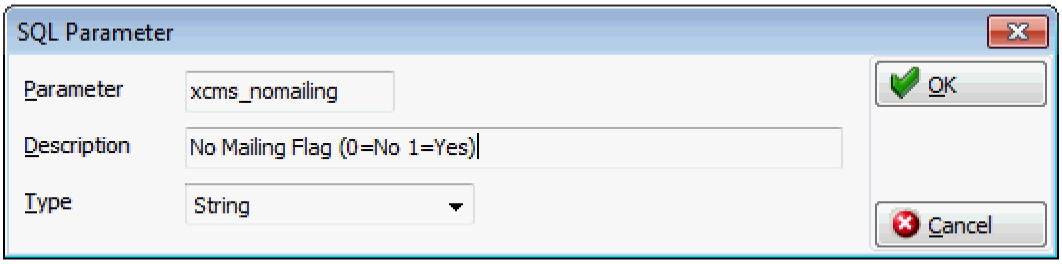
10. If the SQL statement requires input from the user then this can be done via PARAMETERS.

11. Select the required SQL Statement and in the Parameters panel click NEW to display the SQL parameter dialog box.



12. In the PARAMETER box enter the SQL parameter, for example XCMS_NOMAILING (max 20 characters).

13. In the DESCRIPTION box, enter the text which should appear when the user runs the SQL statement, for example NO MAILING FLAG (0=NO 1=YES).



14. Click OK to close the SQL parameter dialog box.

15. Select COLUMNS tab for defining columns on the SQL View

16. Click NEW button for displaying the column dialog box, enter a field name and a display name or

17. Click ADD button for selecting a field

18. Select a field and press OK button
19. Select the SETTINGS tab for applying a HTML file and HTML ID field
20. Click **Close** button and apply the changes to close the Custom SQL statements screen.

How to display columns to display in colors

On the custom SQL dialog box click  to display the following help text:

Columns with special prefixes in their names are interpreted as color values:

c_font_ means font color.
c_bkg_ means background color.

Color value can be represented different ways:

Red Green Blue values between 0 and 255: RGB 255,255,255
Hexadecimal rgb value: $FFDDCC
Wcol record id: 1012
Wcol short description: WHI

Example

select xcms_id,4 c_font_xcms_id,'WHI' c_bkg_xcms_id,xcms_name1,'RGB 100,112,155'
c_font_xcms_name1,'$FFDDCC' c_bkg_xcms_name1 from xcms

In the example above:

The column XCMS_ID is displayed with a white background color and a violet font color.

The column XCMS_NAME is highlighted in light blue and the font color in steel blue.

Detailed below are some custom SQL query examples:

Reservations

- Search for a calculated rate in the advance query of the reservation navigator

  Custom SQL statement:

  select yres_id from yres,ydet where ydet_id=yres_current_ydet_id and ydet_rateamount between :FromRateAmount and :ToRateAmount

  Parameters:

  FromRateAmount and ToRateAmount

  When this query is run from the reservations navigator then a prompt screen is displayed asking you to complete the from rate amount and to rate amount> All reservations with a calculated rate within the amount range are listed.

Customer Profiles

- Search for incorrect email address on customer profiles

  Custom SQL statement:

  select xcom.XCOM_XCMS_ID from xcom, xcmt where xcom.XCOM_XCMT_ID = xcmt.XCMT_ID and xcmt.XCMT_TYPE = 1 and xcom.XCOM_VALUE not like '%@%'

  When run the above query will list all the customer profiles which have an email communication type which does not contain @ and is therefore incorrect.

  Search for wrong email type on customer profiles

  Custom SQL statement:

select xcom.XCOM_XCMS_ID from xcom, xcmt where xcom.XCOM_XCMT_ID = xcmt.XCMT_ID and xcmt.XCMT_TYPE <> 1 and xcom.XCOM_VALUE like '%@%'

When run the above query will list all the customer profiles which have a communication type which is not an email type but with an email address in it.

Room Blocking

- Search for reservations with specific specials codes:

  Custom SQL statement:

  select yres_id from yres where exists (select 1 from yrlr,xpda where yrlr_yres_id=yres_id and yrlr_xpda_id=xpda_id and yrlr_xpac_id=18 and (upper(xpda_shortdesc) like upper(:SPECIAL1) or upper(xpda_shortdesc) like upper(:SPECIAL2)))

  When this query is run then a prompt screen is displayed asking you to complete Special Code 1 and/or Special Code 2.

> **Note:** The custom SQL statements are not displayed on the respective search dialog box if a role has not been assigned to the SQL group.

Gather database statistics

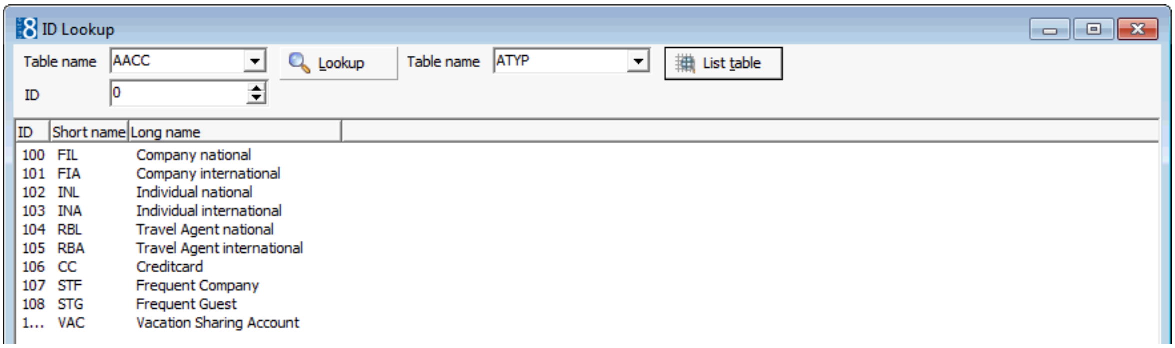
This option is calling an analyzing package provided by ORACLE. This package enables better performance and response time of the ORACLE database. Select this option to analyze actual data in the Fidelio Suite8 database, ORACLE will then use this analysis to produce better, less resource consuming data. For the user this will be recognised by better response time on SQL Queries.

> **Note:** The use of DBMS_STAT_GATHER and its _STALE option is covered in detail in the related PDF file provided by ORACLE or in the ORACLE Help. The package should be applied only by System Administrators or Installers after having read the PDF or ORACLE Help file. During gathering statistics process, the response time of the clients will be slow.

ID Lookup

This option may be used to display a specific record or all the records in a table:

- To list a specific record in a table - select the TABLE NAME, enter the ID number and click the LOOKUP button.
- To list all the records in a table - select the TABLE NAME and click the LIST TABLE button.



> **Note:** This option is only available when starting Suite8 with the parameter DEBUG.

Sequence Fix

Each table in the Fidelio Suite8 database has a corresponding sequence table. The sequence fix option checks each table and updates the corresponding sequence table with the highest (maximum) used ID.

To run sequence fix, select SEQUENCE FIX and click the START button.

> **Note:** It is recommended to run this option only after the installation has been completed, especially if the installation was performed with the 'all script' which is a script file used to fill certain tables with default values.

Support SQL

This option is used to run SQL query scripts to check performance, memory, sessions, and views and to view the data dictionary view. It is only used by the support department.

SQL log

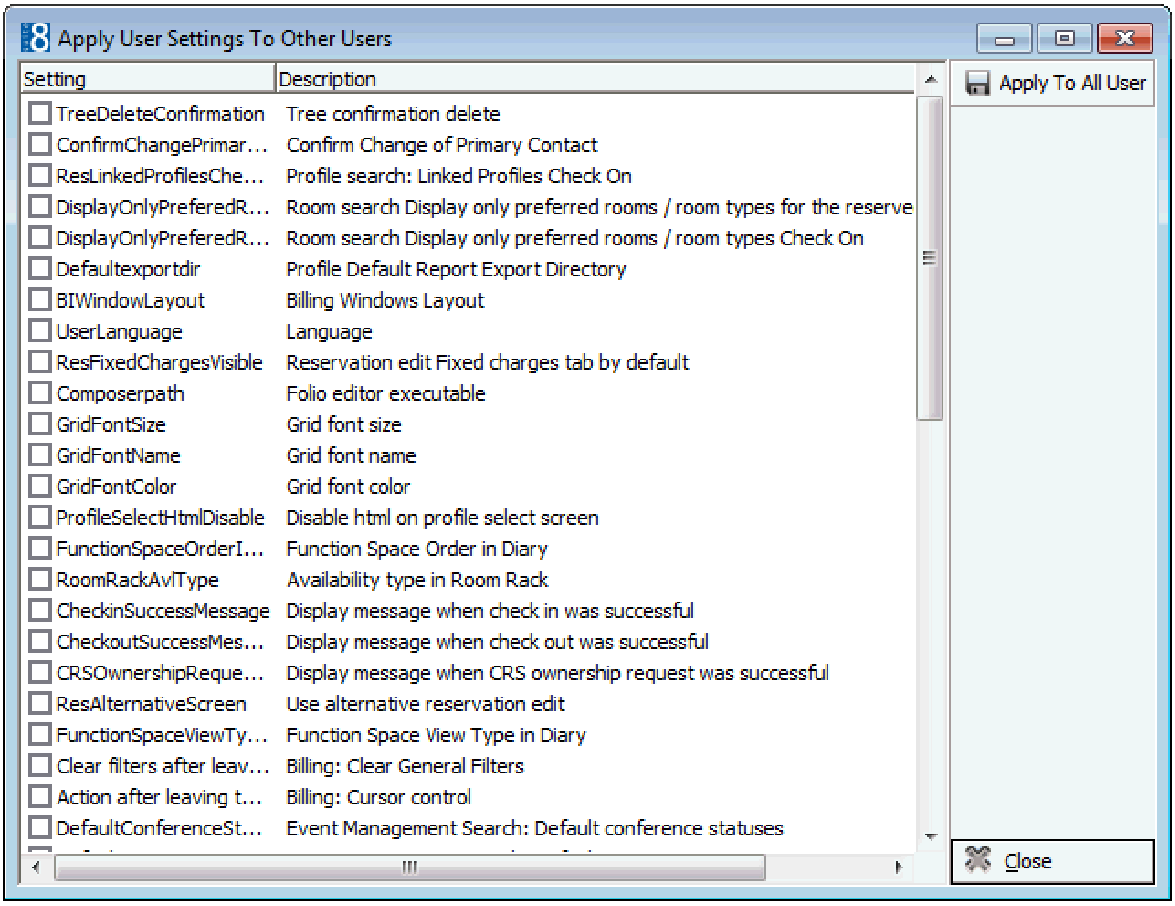
This option is used to view the SQL log file queries that have been run on the database from the application. This information gives information from the time SQL queries were run and is helpful for developers and support.

Miscellaneous

Apply user setting to others

This option can be used to apply the user settings defined for the logged in user to all other users.

> **Note:** This option is only available when starting Suite8 with the parameter DEBUG.



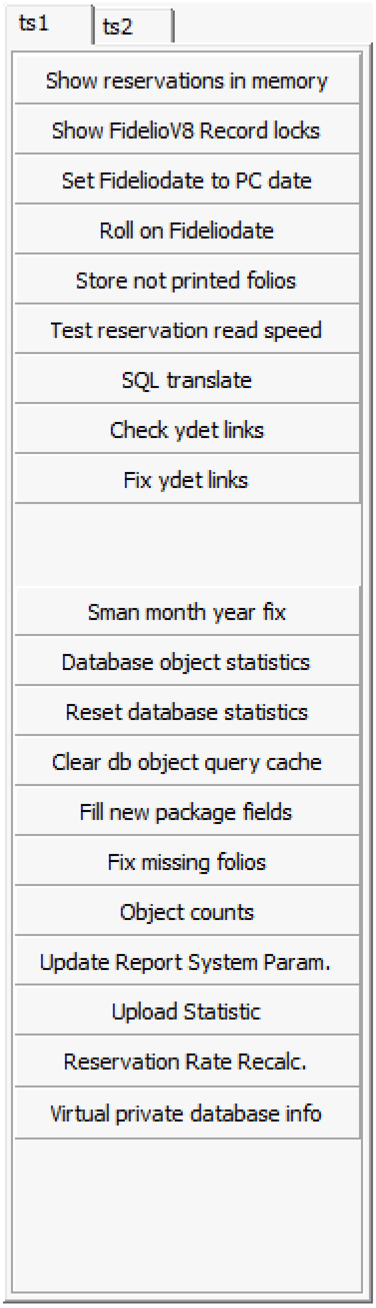
User settings are defined via the option User Settings under the Miscellaneous Menu.

Developer

This option should only be used by system supervisors, developers or when advised by support.

> **Note:** This option is only available when starting Suite8 with the parameter DEBUG.

The Developer page is divided into 2 tabs:
Available Options on the first tab:



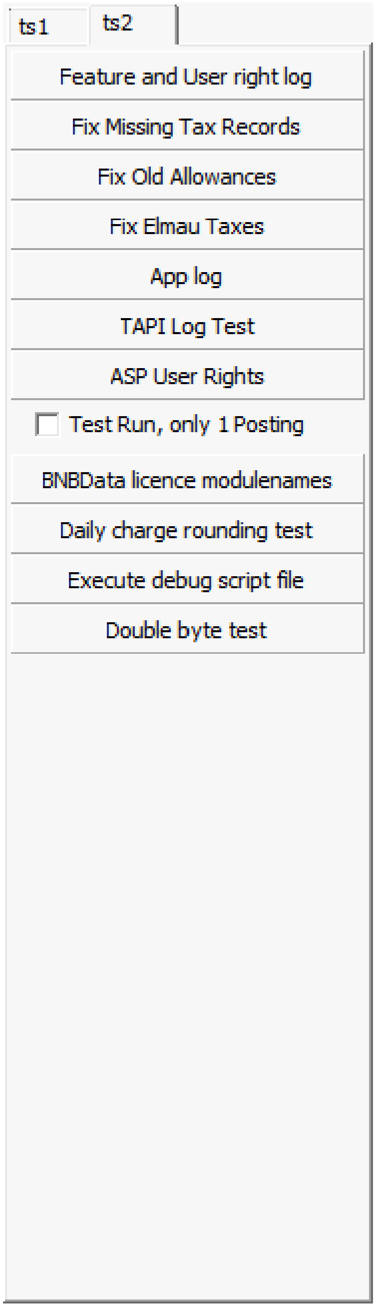
- Show reservations in memory
- Show Fidelio V8 Record Locks
- Set Fideliodate to PC date
- Roll on Fideliodate
- Store not printed folios
- Test reservation read speed

- SQL translate
- Check ydet links
- Fix ydet links

- Sman month year fix
- Database object statistics
- Reset database statistics
- Clear db object query cache
- Fill new package fields
- Fix missing folios
- Object counts
- Update Report System Param.
- Upload statistic
- Reservation Rate Recalc
- Virtual private database info

Note: Available only in debug mode.

Available Options from the `second tab`:



- Feature and User right log - allows viewing changes made to all features, such as activated flags and licenses and changes made to user rights. The log can be cleared by pressing CLEAR button.
- Fix Missing Tax Records
- Fix Old Allowances - fixes old allowances with missing profit postings for checked in guests and fixes missing profit postings in cancelled room charge postings
- Fix Elmau Taxes
- App Log
- TAPI Log Test
- ASP User Rights
- Test Run, only 1 Posting
- BNBData Licence modulenames

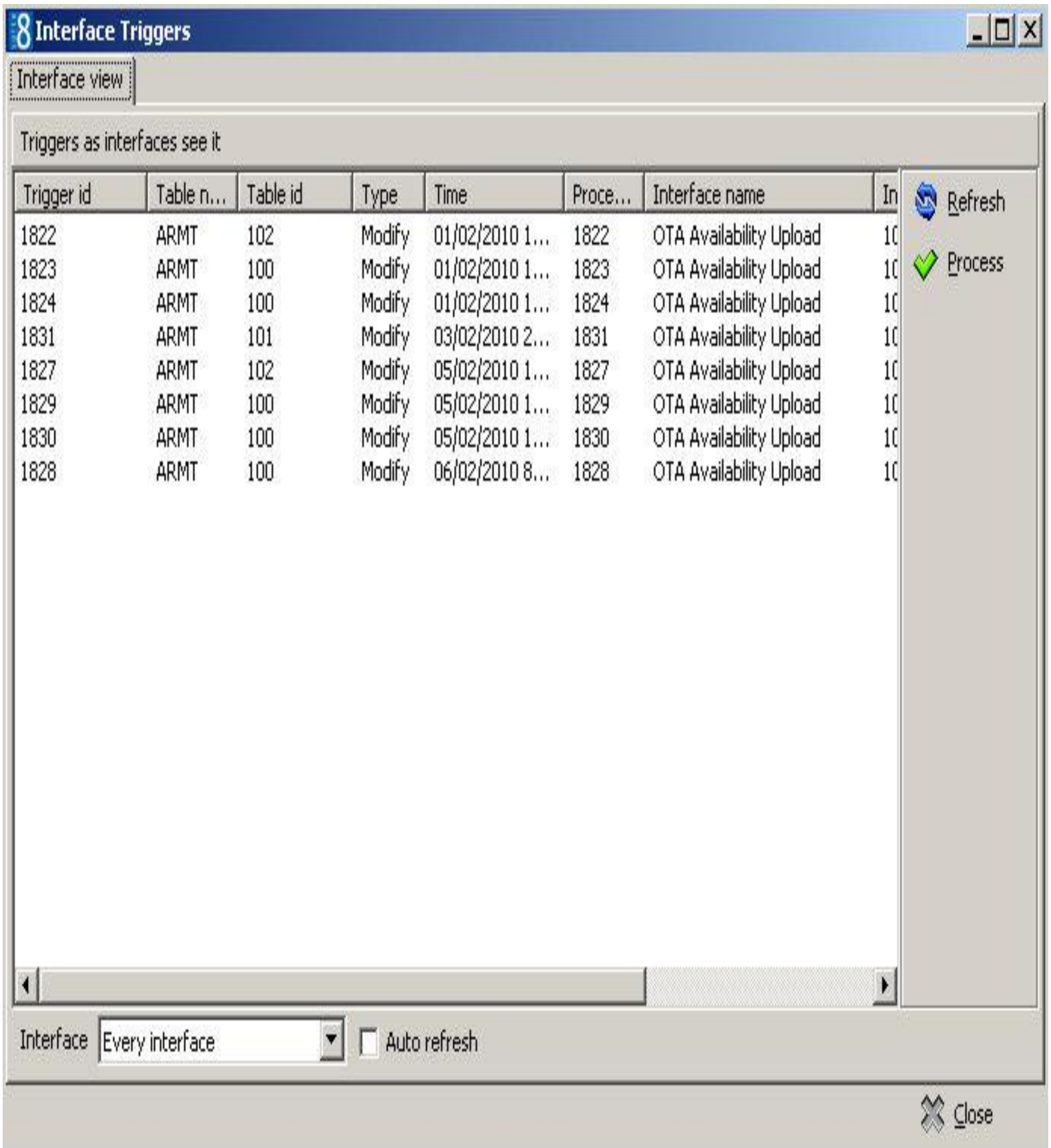
- Daily charge rounding test
- Execute debug script file
- Double byte test

Interface Triggers

This option is used to view and process triggers for the interfaces. A trigger is an action causing the automatic invocation of a procedure.

Trigger handling points for the V8 Online Interface:

- If the same trigger exists and it was not processed then no new trigger is created
- If there is an overlapping trigger that was not processed, the 'fromdate' and 'todate' are changed to the widest interval.
- If any of the interfaces processed (zipf) the existing trigger then a new trigger is created. The processed flag is turned to 1 after reading a trigger. This ensures indicating that the interface started to process a trigger.



Note fix

This option is used to remove special characters from the notes field. It is used after conversion or update to remove special characters.
There are two fix options:

- FIX 1 - Removes <fid$d> characters. In earlier versions the notes were stored in a different way which resulted in showing the <fid$d> on print outs.
- FIX 2 - Removes special characters from the notes field which came from conversion from Fidelio Version 6 or Version 7.

Reset form positions

This option may be used to resize all forms and set them back to their original screen position. Occasionally after setting a screen to full mode and then opening it a second time the screen is not displayed correctly. If this happens then the forms can be repositioned using this functionality.

System Check

This option is used to run checks for contents and existence of primary keys on the Fidelio Suite8 tables.
The screen is divided into 2 sections:

- The left side displays the possible system checks: Reservation, Profile, Database, Content, Suite8 Central and Duplicates.
- The right side displays Messages for the system checks

System Check Options

System Check Option	What it does
Expand all	Expands the folders to show all available options.
Collapse all	Collapses all the folders to the uppermost level.
Check all	Selects all the options by marking the check box next to the option with a tick mark.
Uncheck all	Clears all the options by removing the tick mark from the check box next to the option.
Reverse check	Reverses the current selection.
Check selected	Selects the options highlighted in the check grid.
Uncheck selected	Clears the options highlighted in the check grid.
Check group	Certain check options have been grouped into groups Allows you to select all the options which belong to the group Profile or all the options which belong to the group Suite8 Central.
Execute sel.	Runs the system checks which have been selected.

Save log to file	Saves the results of the system check to a log file.
Enable error fix	Depending on the type of system check run, the system may offer to fix any errors found.

The system checks available are as follows:

Reservation Check

System Check	What it does
Res< → block room type mismatch	The reservation detail file (ydet) will be checked for records that have a different room type than linked block (ybld) records.

Profile Checks

System Check	Checks for:
Invalid birth dates	Individual customers with suspicious birth dates.
xpal_xpac_id values	Inconsistent xpal_xpac_id values.
Duplicate xpal records	Duplicate xpal records. Duplicate customer predefined attribute links.
No wmlg record for profiles	No wmlg record for profiles.
Profile duplicate notes	Same notes duplicated.
Meaningless notes	Empty notes or notes containing only spaces and line end characters. Functional only if xcno_notesvarchar exists
Merged but active profiles	Locally merged but active profiles.
Merged to self profiles	Profiles locally merged to self.
Wrong xcms type of company individual links (xcil)	Wrong xcms type of company individual links (xcil).
Wrong xcms type of individual individual links (xciil)	Wrong xcms type of individual individual links (xiil).
Wrong xcms type of master sub company links (xmsl)	Wrong xcms type of master sub company links (xmsl).
Self individual individual links (xciil)	Individual individual links (xiil) linking the same profile for itself.
Self company company links (xccl)	Company company links (xccl) linking the same profile for itself.
Self master - sub company links (xmsl)	Master - sub company links (xmsl) linking the same profile to itself.
Membership card level number	Nonexistent level number for bonus point cards.

Database Check

System Check	What it does
Primary key existence	Checks if primary key exists for every table. Primary keys are one of several possible attributes which can be used to uniquely identify a record in the database table.

Content Checks

System Check	What it does
Log timestamp in future (wmlg)	Log timestamp in future (wmlg)
Profile timestamp in future (xcms)	Profile timestamp in future (xcms)
Block forecast records (YBOS)	Checks for block forecast records (YBOS) that have no valid block details.
Missing block forecast records (YBOS)	
Notes format	Notes with bad or obsolete format. Functional only if xcno_notesvarchar exists.
Guest package - Reservation package consistency (YRGP-YPAL)	
Reservation sharenum check	
Reservation sharenum check for the last 90 days	
AR balance speed fields	
AR transfer speed fields	
Reservation customer link (YCLN)	Checks for duplicate records in the reservation customer link table. This option should be run after data conversion.
Reservation customer link (YCLN) invalid profile	Checks for records in the reservation customer link table that have an invalid profile linked. This option should be run after data conversion.

Suite8 Central checks

System Check	What it does
Same profile global id	Profiles with same global id
Address global id	Address with global id linked to not matched profile

Address with invalid global id	Incorrect on screen explanation.
Communication global id	Communication with global id linked to not matched profile
Communication with invalid global id	Communication with 0 or negative global id.
Notes global id	Notes with global id linked to not matched profile.
Notes with invalid global id	Notes with 0 or negative global id.
Profile global id in central	Profile global id existence in central hotel.
Address global id in central	Address with global id existence in central hotel. Works only if central hotel is hosted by same oracle server instance.
Communication global id in central	Communication with global id existence in central hotel. Works only if central hotel is hosted by same oracle server instance.
Notes global id in central	Notes with global id existence in central hotel. Works only if central hotel is hosted by same oracle server instance.
Country unique code	Country with non unique or empty code.

Duplicate Checks

System Check	What it does
Notes duplicate check	Same notes duplicated.
Double wmlg records	Double wmlg records.
Duplicate individual individual links (xiil)	Duplicate individual individual links (xiil).
Duplicate company company links (xccl)	Duplicate company company links (xccl).
Duplicate master - sub company links (xmsl)	Duplicate master - sub company links (xmsl).
Duplicate company individual links (xcil)	Duplicate company individual links (xcil).
Duplicate communications	Keeps the newest record and all referencing 'ID's' in other tables are changed to point to the new record.
Duplicate primary communications	Keeps the newest record and all referencing 'ID's' in other tables are changed to point to the new record.

Duplicate primary address flag	Keeps the newest record and all referencing 'ID's' in other tables are changed to point to the new record.
Duplicate address	Duplicate address.
Duplicate customer preference	Duplicate customer preference.
Duplicate membership	Checks for duplicate membership numbers. In addition considers XMTY_ID which is the unique internal ID in the table XMTY (Membership Types table), as well as the table XMNR for the membership numbers.
Duplicate linked rate code	Duplicate linked rate code (xcrl).

Update IFC error types

This option is only available when starting Fidelio Suite8.6 in debug mode and should be run after the update to Fidelio Suite8.6.0.4. This will update old entries from the Interface Log table (WILG) and add the following filters to this table:

- EF = EFT Interface
- RS = Room Status Change
- TV = Top Vital Interface
- MB = Minibar Postings
- AG = Allgau Interface
- UN = Unknown

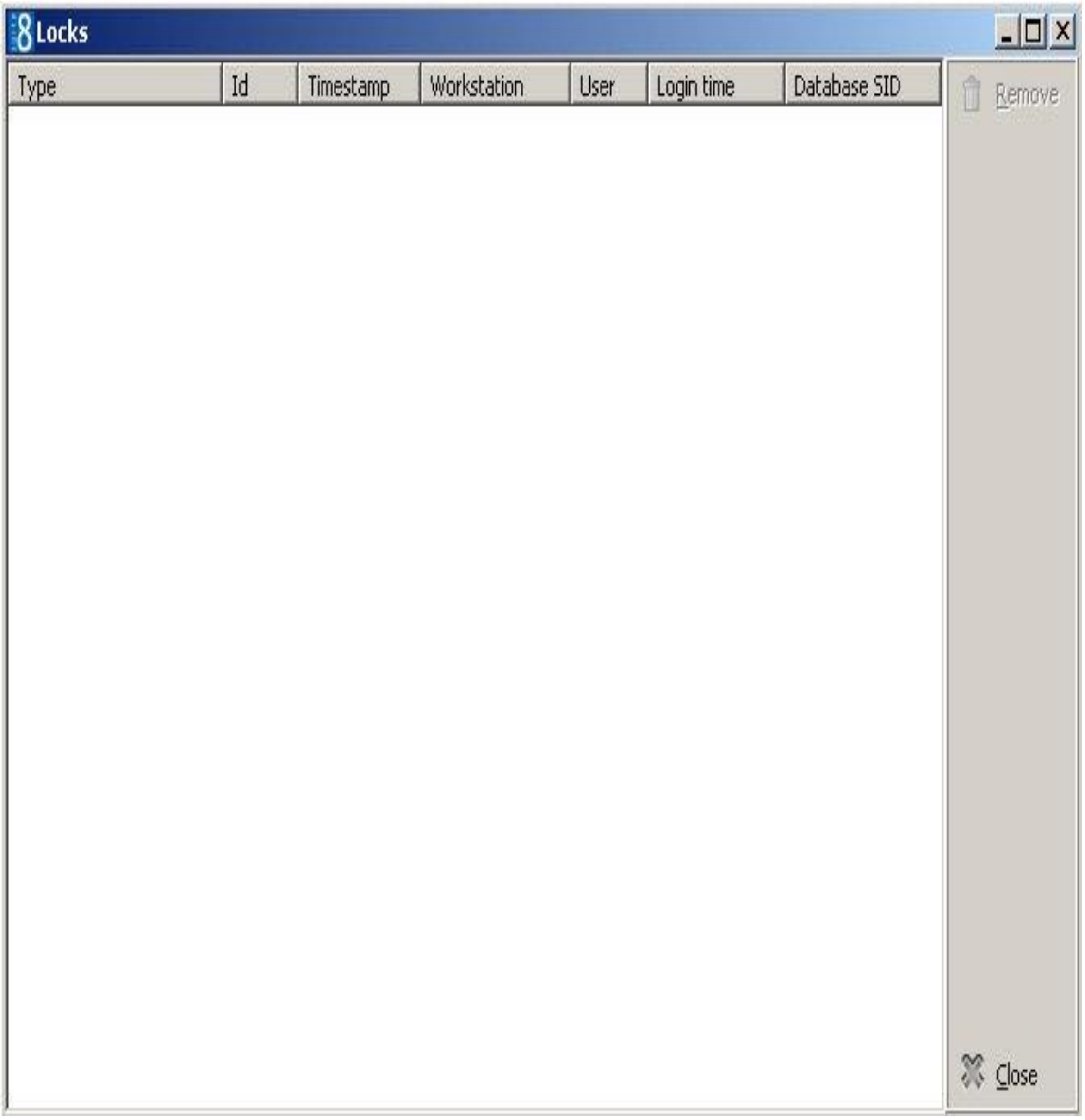
When accessing the IFC Error Log screen, the new filters allow only errors related to the corresponding interface to be displayed instead of displaying all errors.

Note: This option is only available when starting Suite8 with the parameter DEBUG.

Database Locks

This option may be used to monitor and clear database locks.
Selecting this option displays all database locks with the Type, ID, Time stamp, Workstation, User, Login time and Database site ID.
With the appropriate rights a record lock can be cleared by selecting the record and clicking the REMOVE button.

Note: Monitoring database locks is a support tool, therefore it is not recommended to clear locked records without the advice of the local support office.



Database locks functionality is controlled by the user rights View and Remove under Setup → Configuration → Users → User Definition → Rights → Miscellaneous → Locks.

Removal of locks is displayed in the user log if the option Remove database lock in wlck is selected in Setup → Configuration → Users → User Log → Application and Users.

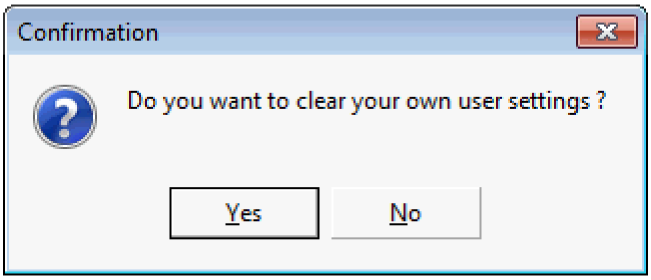
Reset User Settings

This option may be used to partially or fully reset the user settings of the signed in user or of a specific user (with the appropriate user rights).

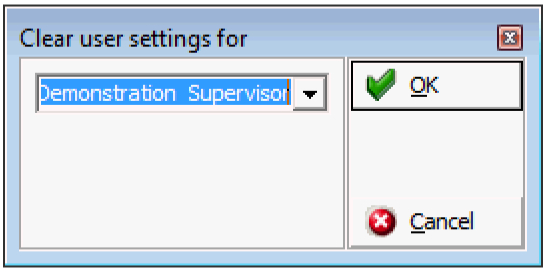
How to reset user settings

1. On the SETUP menu click MISCELLANEOUS and then select SYSTEM MAINTENANCE.
2. On the System Maintenance menu click MISCELLANEOUS and then click RESET USER SETTINGS.

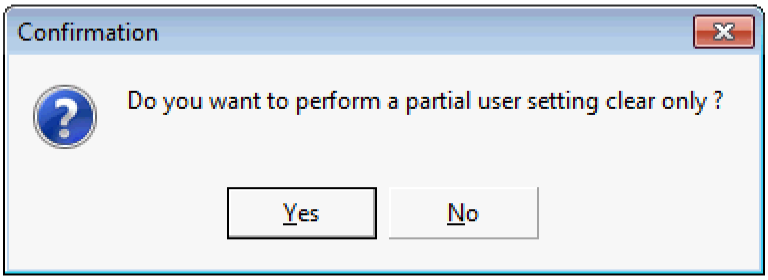
   A message is displayed asking: "Do you want to clear your own settings ?"



3. Click Yes to clear only your own settings or click No to clear the settings of another user.
4. If the settings of another user are to be cleared then select the user and click OK.

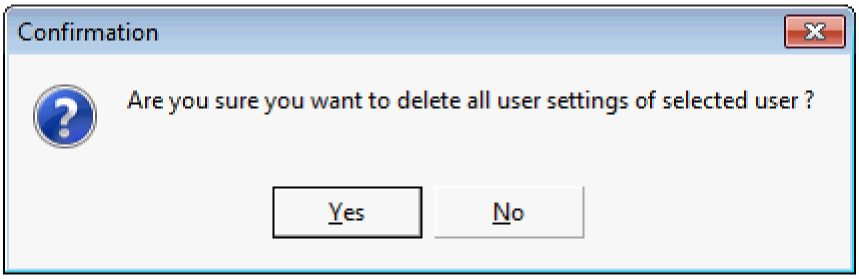


A message is displayed asking: "Do you want to perform a partial user setting clear only ?"



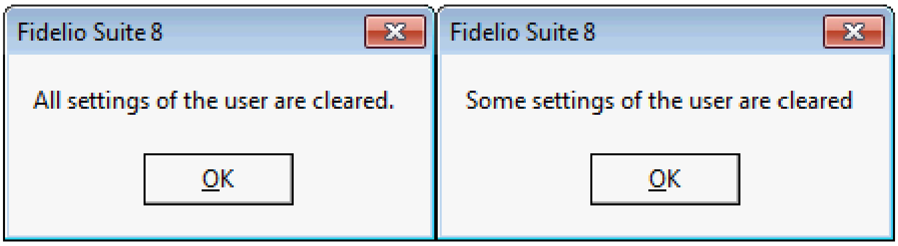
5. Click Yes to perform a partial user setting clear only or click No to delete all the user settings.

   If all the user settings are to be cleared then a message is displayed asking: "Are you sure you want to delete all user settings of selected user ?"



6. Depending on the selections made previously then one of the following messages is displayed:

   "All settings of the user are cleared." or "Some settings of the user are cleared."



Reset user settings functionality is controlled by the user rights Reset user settings of other users under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Initialize Bonus Points

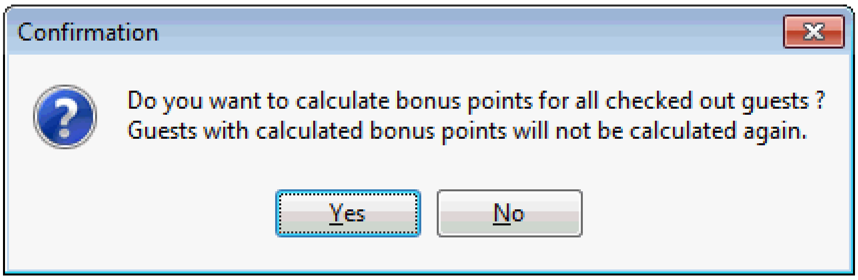
This option is used to initialize bonus points; when running this procedure:

- Bonus points are calculated for all checked out guests.
- Guests with already calculated bonus points are not considered.
- Bonus point cards of guests can be assigned to reservations automatically.
- Reservations with assigned cards are not changed.
- A starting date for the bonus point calculation can be selected.

How to initialize bonus points

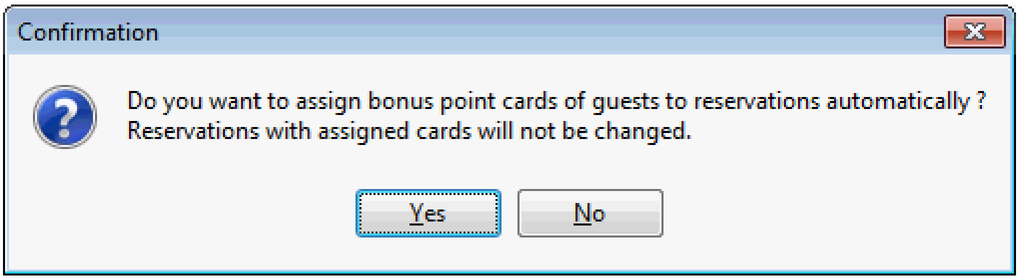
1. Click MISCELLANEOUS on the SETUP drop-down menu and then select SYSTEM MAINTENANCE.
2. On the System Maintenance menu click MISCELLANEOUS and then click INITIALIZE BONUS POINTS.

   A message is displayed asking: "Do you want to calculate bonus points for all checked out guests ?"

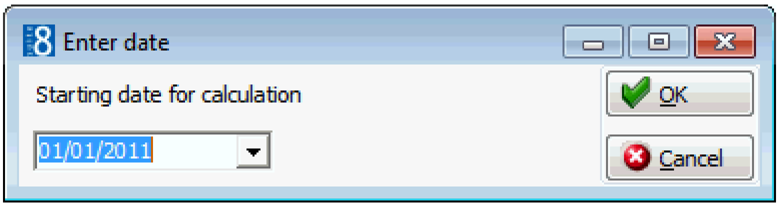


3. Click YES to continue.

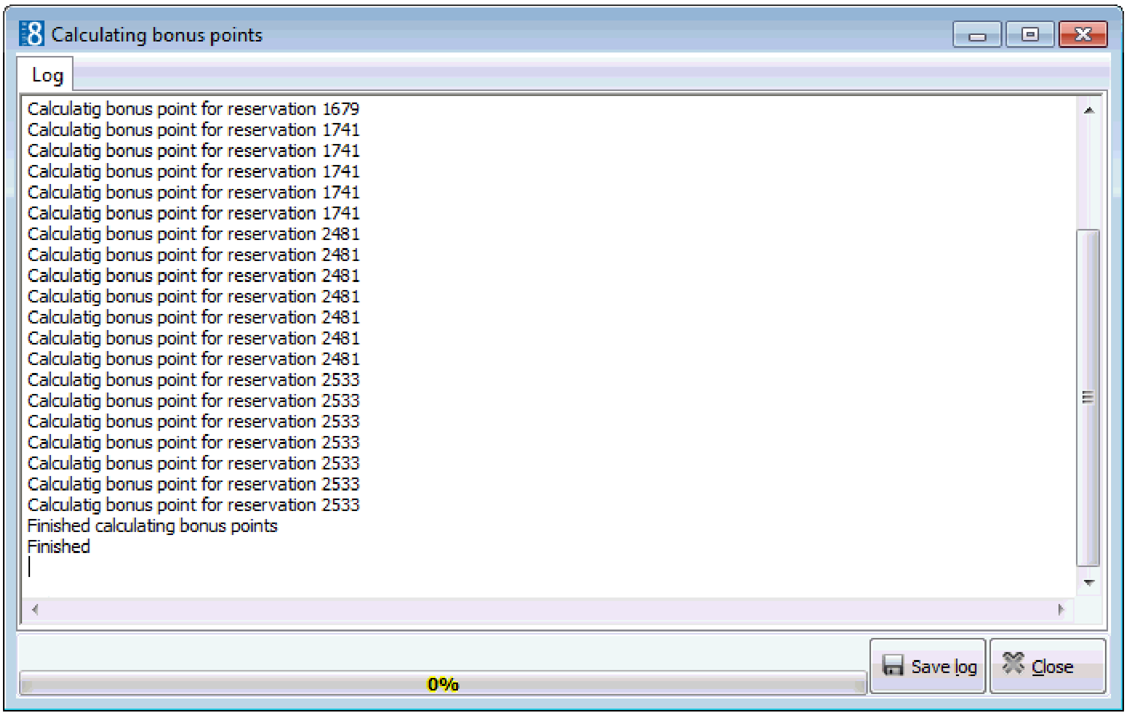
   A message is displayed asking: "Do you want to assign bonus point cards of guests to reservations automatically ?"



4. Click YES to continue.
5. Enter the starting date for the calculation and click OK.



6. The reservation numbers for which bonus points have been calculated is displayed.



7. Click SAVE LOG or CLOSE.

   If you click SAVE LOG then you are prompted for the location in which to save the log file.

Internal Editor Fields Search and Replace Utility

This search and replace utility may be used to change the name and formula content of an internal editor field for selected reports.

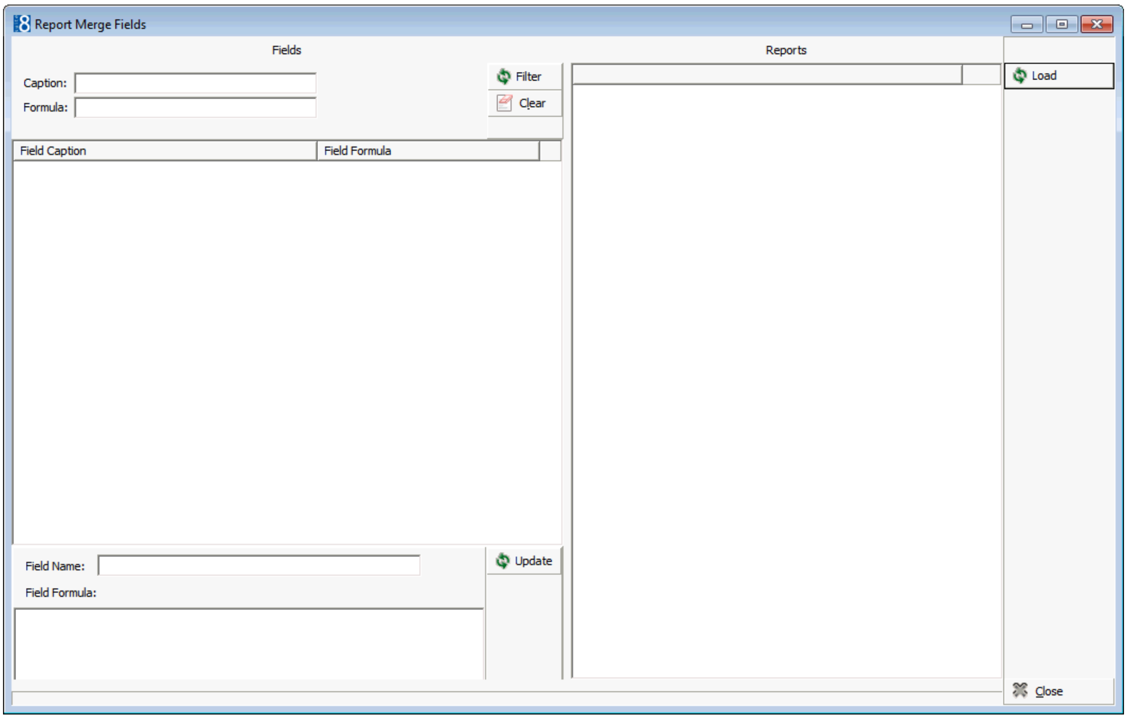
Key Points

- The utility changes only the fields and formulas used in the reports; not the source (views) of it.
- The content to which the field is being changed must be available in the source (views) of the internal editor reports in question.
- If you use default queries for internal editor, then the field must be added or already present before it can be changed.

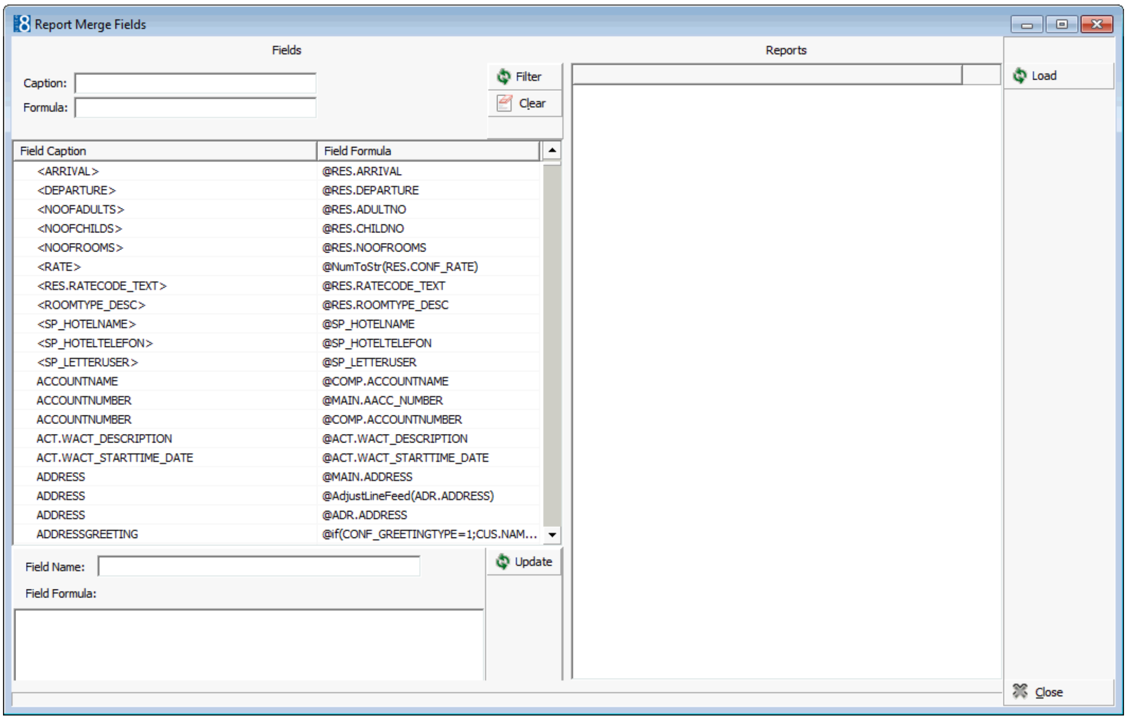
How to use the internal editor fields search and replace utility

1. On the SETUP menu click MISCELLANEOUS and then SYSTEM MAINTENANCE.
2. On the System Maintenance menu click MISCELLANEOUS and then INTERNAL EDITOR FIELDS.

   The Report Merge Fields dialog box is displayed



3. Click the LOAD button to display a list of all the FIELD CAPTIONS and FIELD FORMULAS used in the configured internal editor reports.



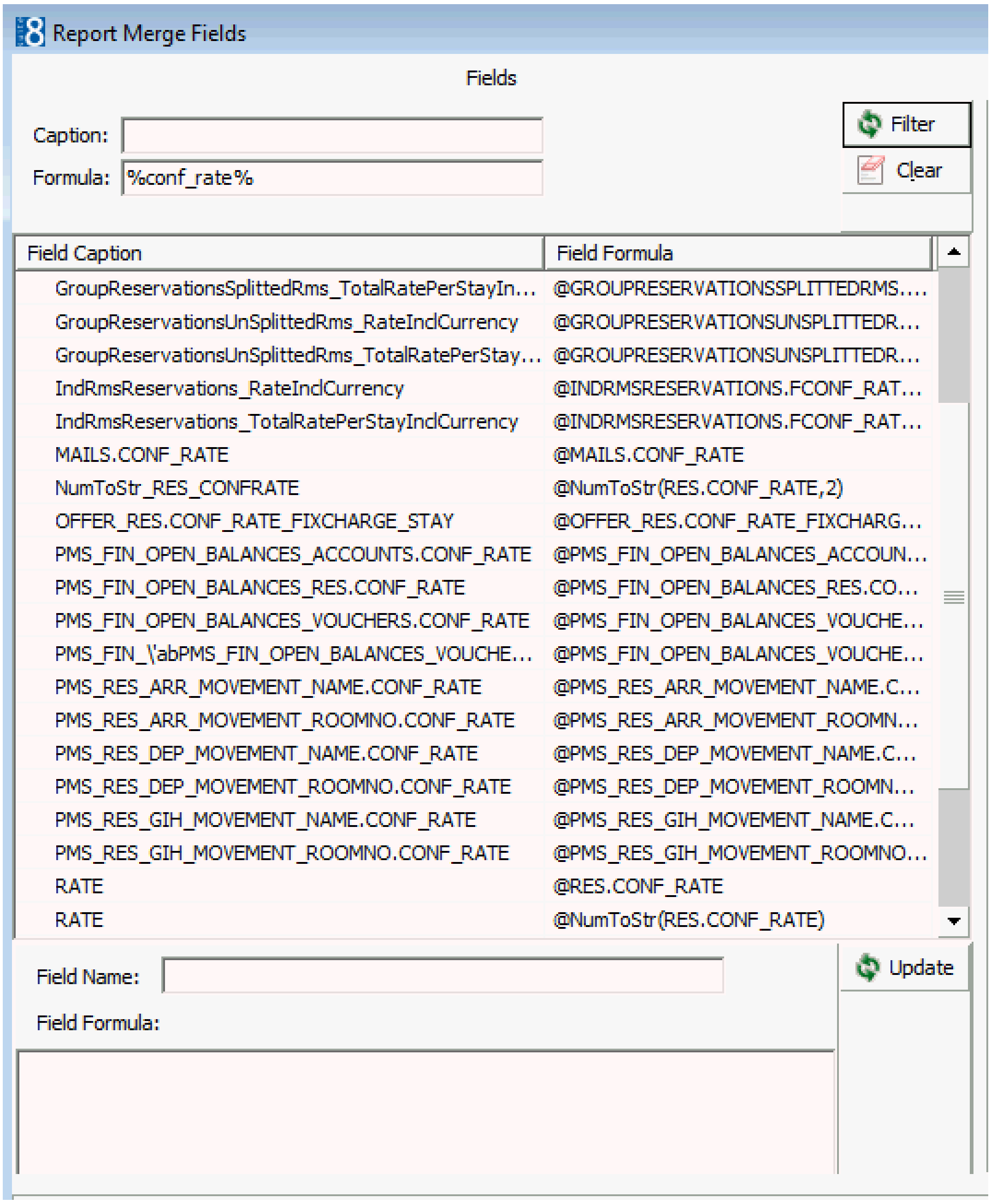
4. The field whose name or content is to be replaced can be located by entering the full or partial CAPTION or FORMULA.

   The search criteria can also be entered using wildcards (%) in order to list captions and formulas which contain a partial match.

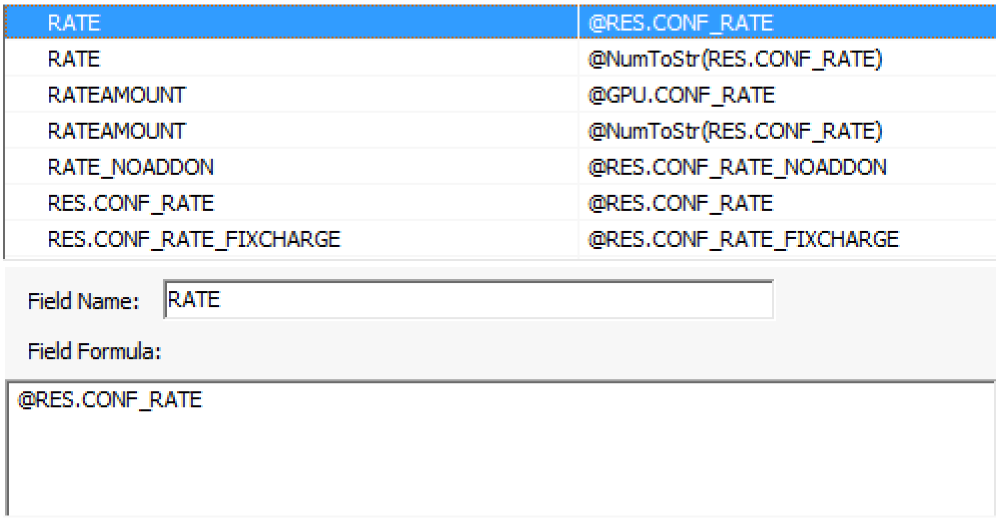
In the following example we will replace CONF_RATE with CONF_RATE_NOADDON.

5. To locate all fields whose formula contains conf_rate, complete the FORMULA box with %CONF_RATE% and then click FILTER.

   A list of the fields and formulas meeting the entered search criteria is displayed.

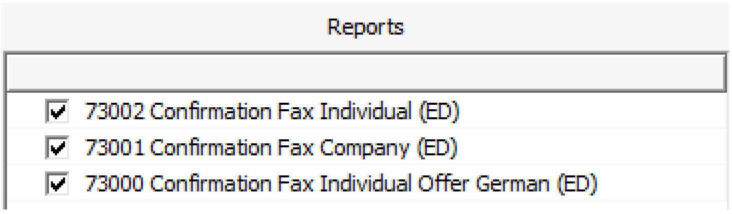


6. Select the required FIELD CAPTION, in our example, we have selected RATE.



7. All reports containing a field with the same name and formula are listed on the right-hand side.

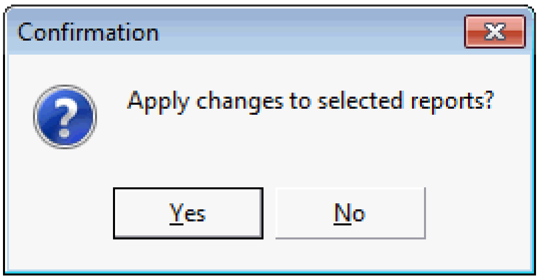
   All the reports are selected by default, clear the check box for reports that do not need to be changed.



8. Change the FIELD FORMULA to RES.CONF_RATE_NOADDON (view V8_EDITOR_RES).
9. Change the FIELD NAME as required, this is optional but it may be logical to also change the field name.

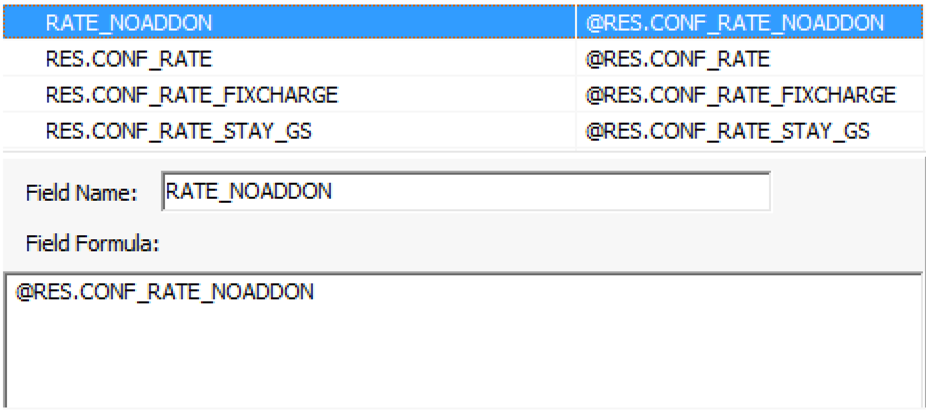
   In our example we have changed the field name to RATE_NOADDON in keeping with the change we made to the formula.

10. Click UPDATE, a confirmation message is displayed.



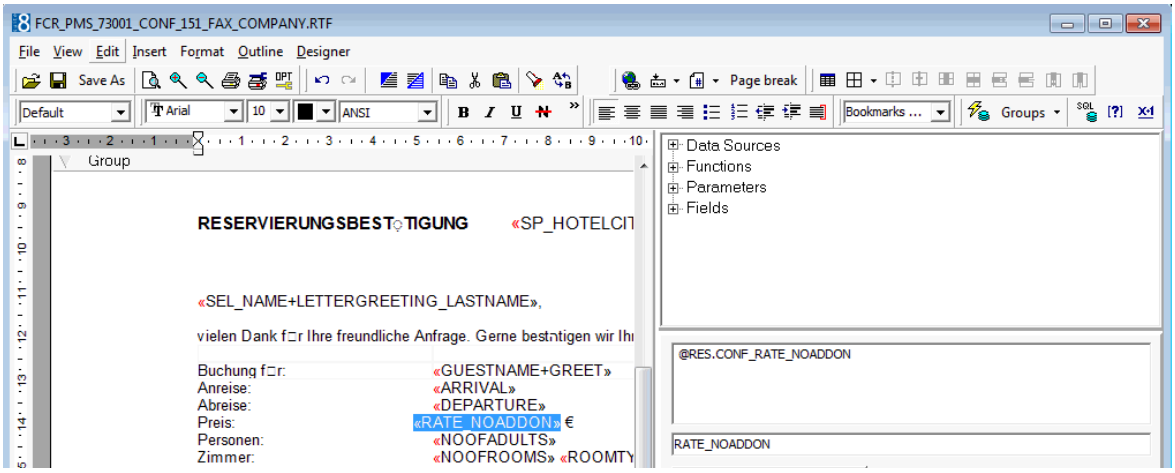
11. Click YES to apply the name and formula change to all the fields in the selected reports.

12. In order to see the changed field caption and formula click LOAD to update the list of field captions and field formulas.



13. Click CLOSE to exit the Internal Editor search and replace utility.

> **Note:** It is strongly recommended to check at least one of the reports to verify that the content has changed and that the report runs as expected. In this report example the field RATE_NOADDON now displays the formula @RES.CONF_RATE_NOADDON.

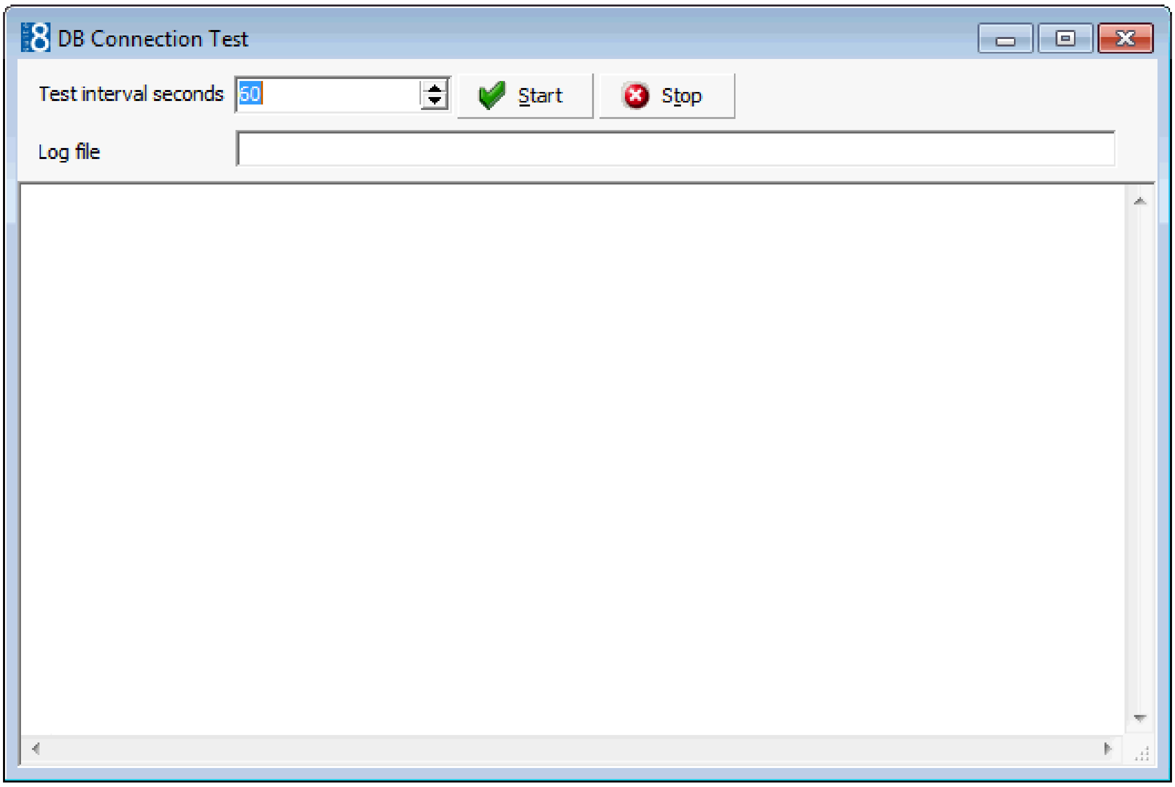


Internal editor fields search and replace functionality is controlled by the user right Internal Editor Fields under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

Database connection test

This option should be run in the situation where the connection to the master property failed.

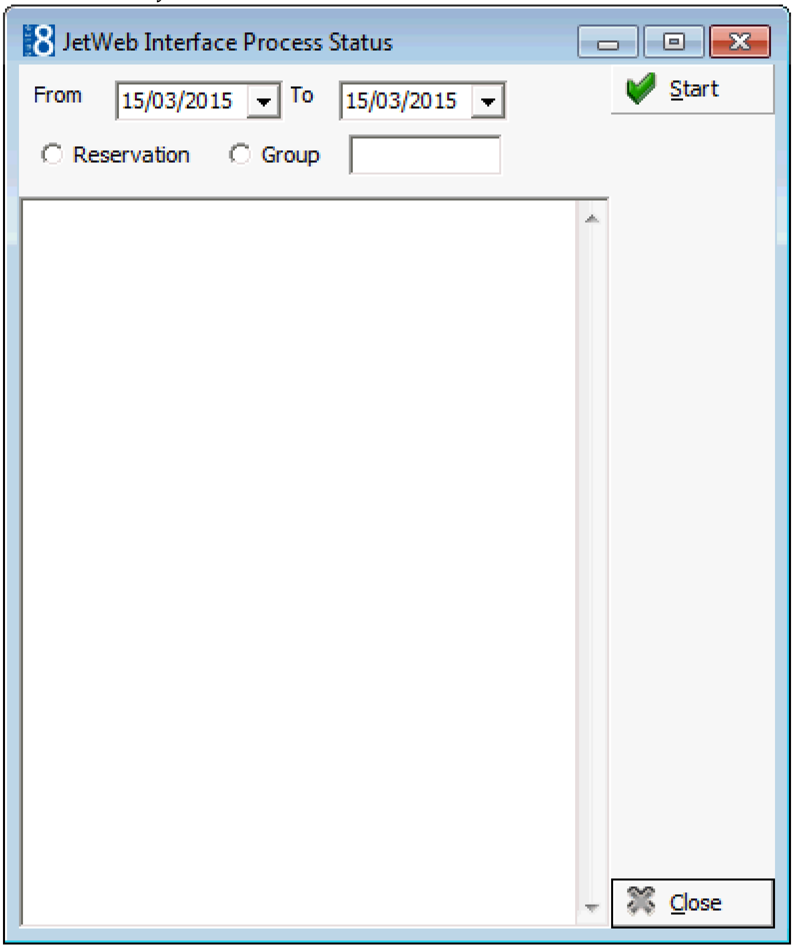
> **Note:** This option is only available when starting Suite8 with the parameter DEBUG.


DB Connection Test
Test interval seconds
60
Start
Stop
Log file

Reservation

JetWeb Export

This option is only available if the JetWeb Interface is installed and a valid license code has been entered. The JetWeb Interface is used in Austria.



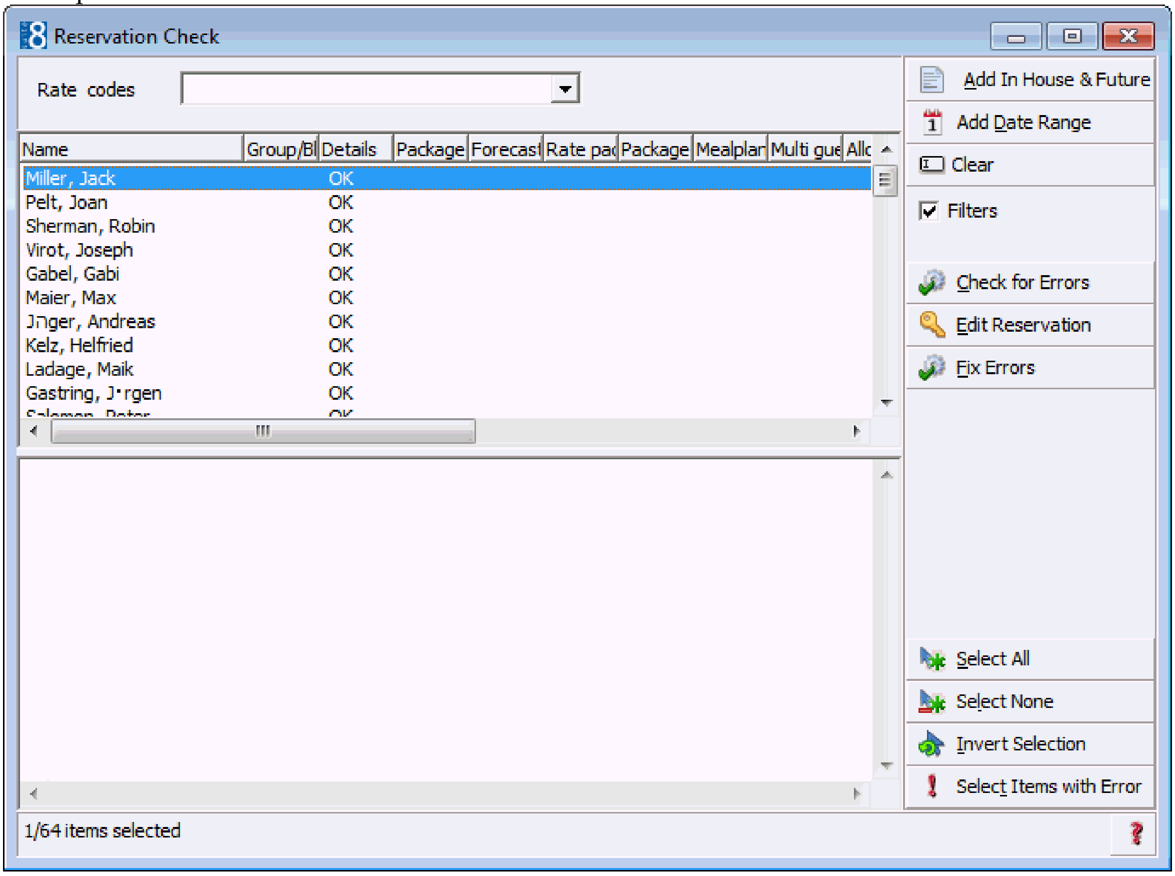
The JetWeb Interface is controlled by the licence JetWeb Interface under Setup → License → V8 Sublicences → Software interfaces.

Rate code order fix

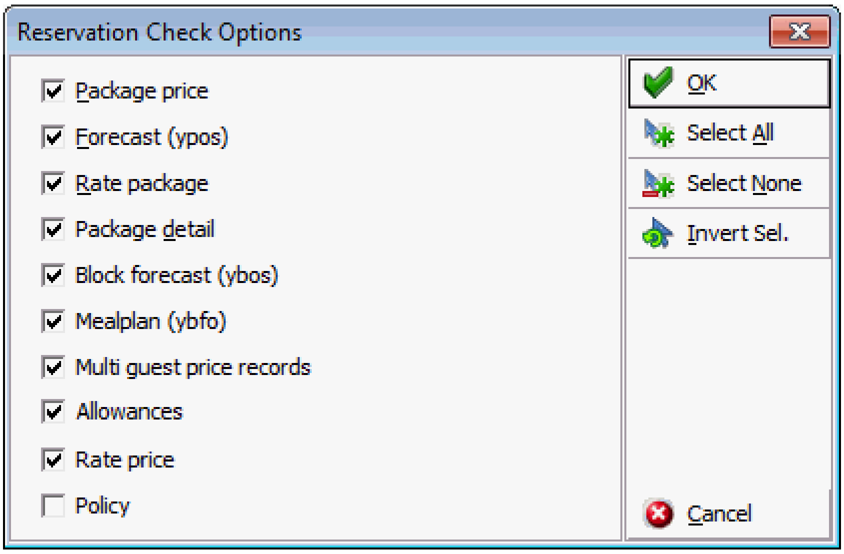
The rate code order fix is used to fix the display order for rate codes attached to profiles. In earlier versions the internal display number for rate codes attached to the guest profile was set to higher than 3 digits, this resulted in an error message. Use this option to fix this and change the display order for rate codes on the profile to the correct order.

Reservation check

This option is used to search for and fix errors on reservations and reservation details.



The errors are generally related to packages and occur after a conversion or when changing packages on rate codes for checked in reservations. When selected, this option first checks if there is a reservation detail for each reservation. All reservations and reservation detail records with the status 'checked in' or 'expected' are verified for the following problem types and found issues will be fixed. The list of problem types will display after selection and when activating the CHECK FOR ERRORS button.



The following reservation check options can be selected:

- Package price – if the package or package detail has a different price than in package configuration

- Forecast (ypos) – if the forecast in the forecast table (YPOS) stores a different amount than the amount calculated
- Rate package – if package frequencies linked to the reservation are not the same as package frequencies linked to the selected rate
- Package detail – if package frequencies linked to the reservation are not the same as package frequencies linked to the selected rate. This check does not consider package frequencies which were linked manually
- Block forecast (ybos) - Reservations linked to a block reservation will be checked for an entry in the block forecast table. Details of the source of any errors are displayed.
- Mealplan (ybof) - Reservations linked to a mealplan will be checked for an entry in the mealplan table.
- Multi guest price records - Multi guest reservations will be checked and filled for amounts in the multi guest reservation table (YRGA)
- Allowances -
- Rate price -
- Policy - the check recalculates the policies based on the rate code link and checks the value linked on the reservation, if a difference is found, the one from the recalculation is taken and replaces the one on the reservation. The message 'Please note that Policy Fix might overwrite manually selected Policies for Reservation' is displayed, indicating that when running this fix, policies which were manually linked to the reservation are replaced.

Options on the reservation check dialog box

Click this option	To do this
Add In House & Future	Select all in house & future reservations.
Add Date Range	Check only reservations for a specific date range.
Clear	Clears the list of reservations.
Filters	Displays a rate code selection box in order to filter the reservation by rate code.
Check for errors	Check for errors.
Edit reservation	Edit the reservation.
Fix errors	Fix the errors.
Select all	Select all reservations.
Select none	Deselect all selected reservations.
Invert selections	Invert selection, for example if Meyer and Browne were selected and all other reservations deselected, invert selection would deselect Meyer and Browne and select all others.
Select items with errors	Select only reservations with errors. This can only be done after the option 'Check for errors' has been run.
?	View the help - a list of problem types that are checked is displayed.

Reservation detail fix

This option creates multiple reservation details in the reservation details table (YDET) for each reservation record in the reservation header table (YRES). The number of reservation detail records created depends on the number of nights entered on the reservation. The handling of the reservation records in Fidelio Suite8 is different from Fidelio Version 6 or Version 7 as version 8 stores a reservation detail record for each night of the guest's stay.

Note: This option **must** be run after a conversion from Fidelio Version 6 or Version 7.

Reservation Detail Fix dialog box

Field	Definition	Legal Values
Continue on error	Mark this checkbox if the reservation detail creation should continue regardless of any error messages.	Check: YES Blank: NO
From Date	Mark this checkbox if the reservation details should be created only from the entered date onwards.	Check: YES Blank: NO
Date Field	Select the date from which the reservation detail creation should start.	Valid date from the calendar that appears in the list box.
Fix Sharenums	This option searches for and corrects any discrepancies with reservation share numbers.	Click button.

Translation

This option may be used to reload translated text from within Suite8 and is accessible via the option RELOAD TRANSLATION on the MISCELLANEOUS menu; this option is only available when Fidelio Suite8 has been started in debug mode.
Selecting this option will reload the translated text so that the translation changes can be seen immediately.

Note: This option is only available when starting Suite8 with the parameter DEBUG.

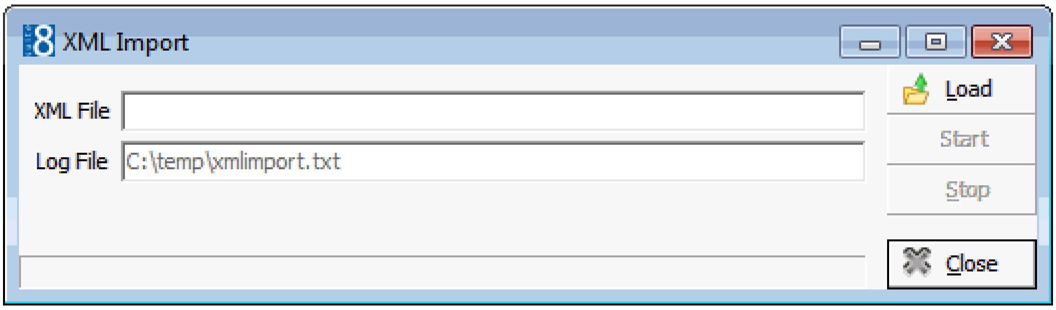
XML Import

XML Import

This option may be used to import profiles from an XML file and is accessible via the option XML IMPORT under Setup → Miscellaneous → System Maintenance.

How to import profiles from an XML file

1. Click XML IMPORT to open the XML Import dialog box.



2. Click the LOAD button to load the XML file.
3. Locate the file and click OPEN.
4. Click the START button.

   Suite8 prompts the number of profiles to be imported and the message: 'Are you sure to start the import?'
5. Select YES; the import starts and a progress bar is displayed together with the status of imported profiles.

Note: The import can be stopped by clicking the STOP button.

XML profile import requires either the licence XML Interface Standard Edition or XML Interface Enhanced Edition under Setup → License → V8 Sublicences → Software interfaces.

The XML URL address is defined via the option XML IFC URL under Setup → Configuration → Global Settings → Profile → Profile 1 tab. For example, http://localhost/V8/FidelioIISWrapper.dll/FidelioXMLInterface.DataHandler

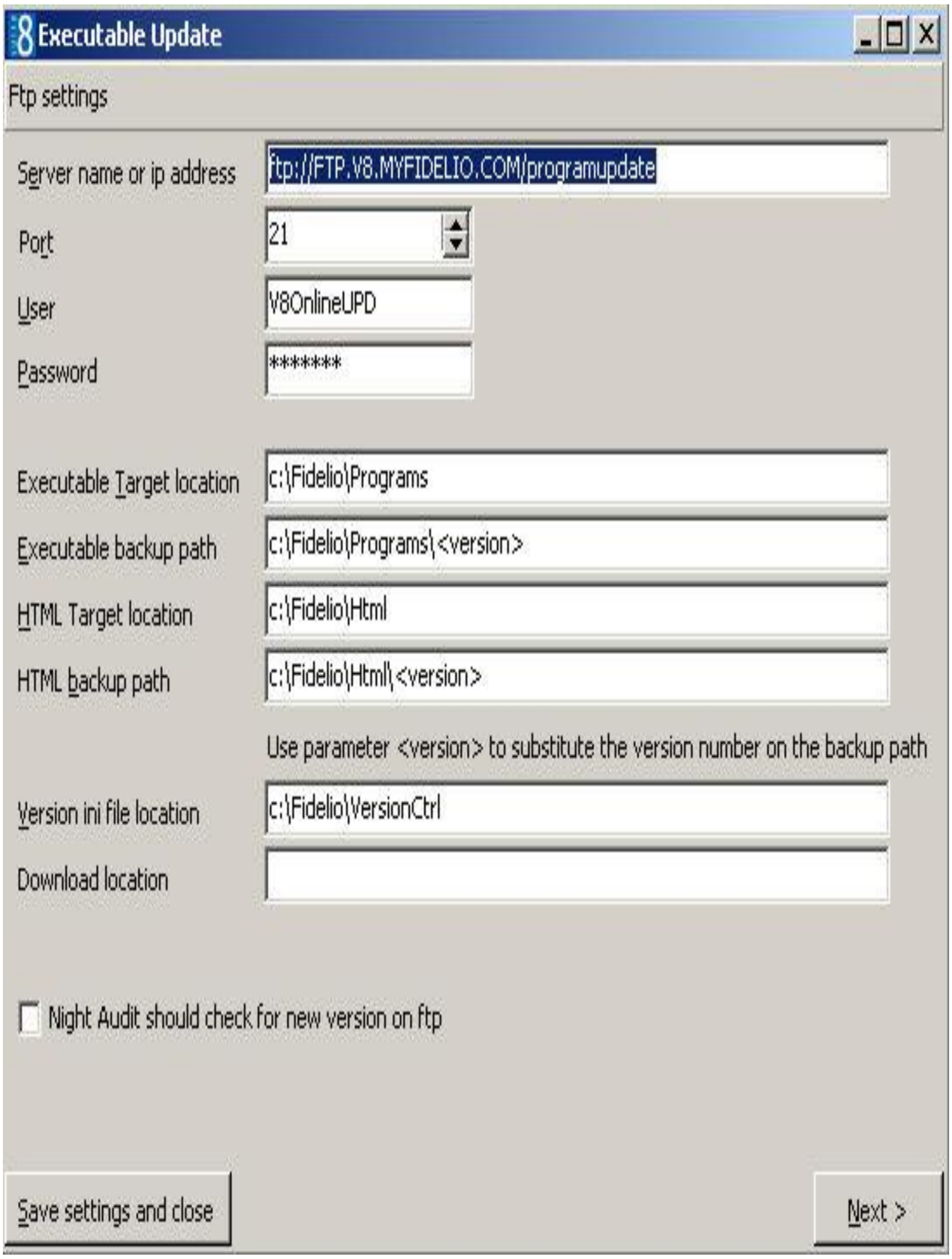
A profile match rule must be selected via the option Profile Merge Rule under Setup → Configuration → Global Settings → Interfaces → Interfaces 3 tab.

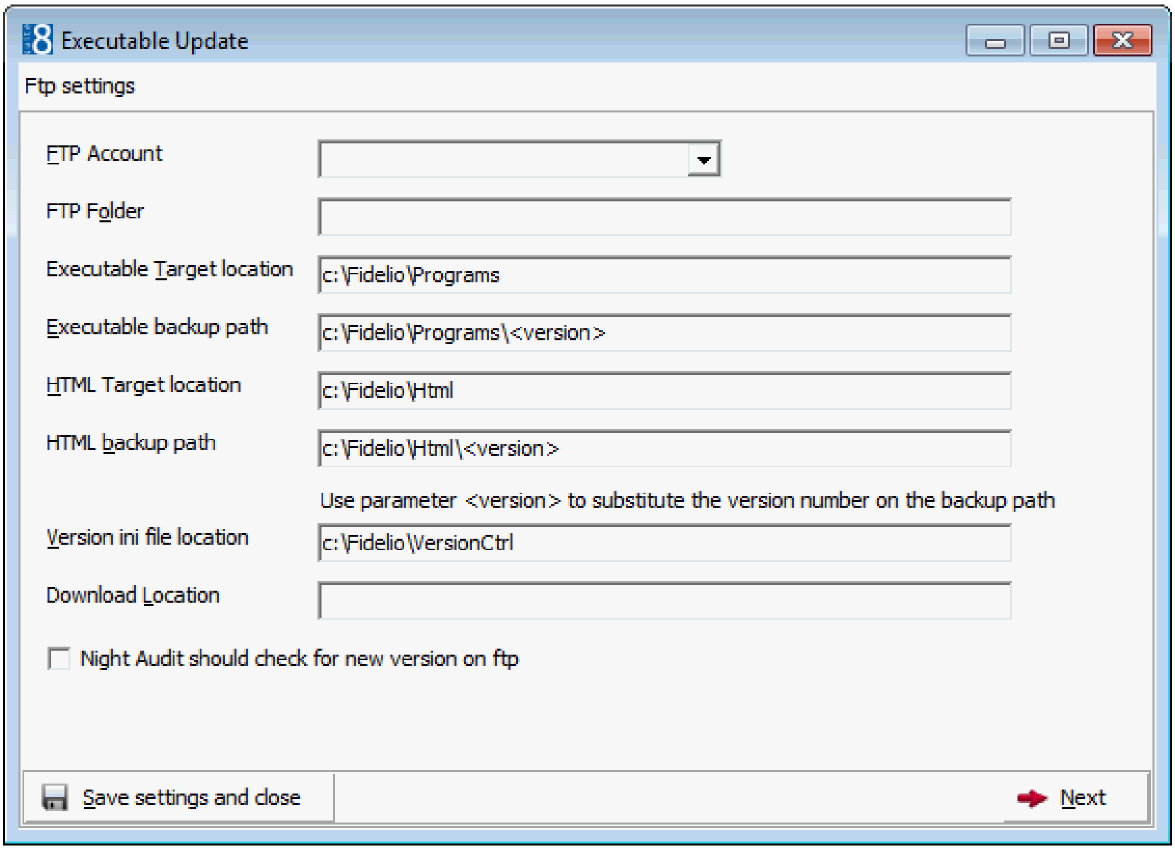
Profile merge rules are configured via the option Interface profile merge rule sets under Setup → Configuration → Miscellaneous → Profile Merge Setup.

Updates

Executable Updates

This option is used to configure an FTP connection for automatic download and/or download and install of the latest executable updates for Suite8.
A version check can be activated under Setup → Configuration → Global Settings → Generic2 tab → Check client version and the required version has to be entered in the version field.
If the parameter is activated a message will display when starting version 8 with a different version than entered under Global Settings.
When performing the executable update a message prompt will allow updating this field to the downloaded version. Once configured, all workstations which are not updated to the actual version will receive a notification message of the new version.


Executable Update
Ftp settings
Server name or ip address
ftp://FTP.V8.MYFIDELIO.COM/programupdate
Port
21
User
V8OnlineUPD
Password
****
Executable Target location
c:\Fidelio\Programs
Executable backup path
c:\Fidelio\Programs\<version>
HTML Target location
c:\Fidelio\Html
HTML backup path
c:\Fidelio\Html\<version>
Use parameter <version> to substitute the version number on the backup path
Version ini file location
c:\Fidelio\VersionCtrl
Download location
Night Audit should check for new version on ftp
Save settings and close
Next >



How to launch executable update

1. Click Miscellaneous from the Setup drop-down menu.
2. Click Updates and then Executable Update.
3. Complete the options on the Executable Update dialog box.
4. Click the Next button.
5. The FTP server will be checked for newer versions and all newer versions on the FTP server will be listed for selection.
6. Select the version for the download.
7. Click the Next button to continue, a dialog screen will show the FTP connection and the download process.
8. Once the program and html files are downloaded, they will be extracted in the configured path.
9. Click the Next button.
10. Next the message "Do you want to change required client version to the new version" will appear.
11. Answering the question with YES will update the version field in Global settings → Generic 2 tab with the new version and all other workstations will receive the notification message of the newer version when starting Fidelio Suite8.
12. The next message displayed is "Update has been successfully performed. Please reboot all workstations to apply new version".
13. Click the Close button to close the screen.

Executable updates dialog box

FTP settings	
FTP Account	Defines the FTP account to be used. **Note:** FTP accounts are defined via the option FTP Account Setup on the Miscellaneous menu.
FTP Folder	The name of the remote path on the FTP server.
Executable Target location	The target location on the local server. The compressed files are downloaded and extracted to this directory.
Executable backup path	The backup path. Use <version> parameter to use the current program version in the path name. For example if the directory entered is c:\temp\<version>, the directory created under c:\temp will be called 8_5_0_8, if the previous version was 8.5.0.8.
HTML Target location	The target location on the local server. The compressed html files will be downloaded and extracted to this directory
HTML backup path	The backup path for the html files. Use <version> parameter to use the current program version in the path name. For example if the directory entered is c:\temp\rtf\<version>, the directory created under c:\temp\rtf will be called 8_5_0_8, if the previous version was 8.5.0.8.
Version ini file location	The location of the version ini file, used with version control.
Download location	Enter the download location.
Night Audit should check for new version on FTP	Select this flag to enable check of new executable files during night audit. At the end of the night audit process, a connection to the FTP server is established using this connection information. If there is a newer version on the FTP server, the message: "New program version is available on FTP: 8_6_0_1" will appear when starting Version 8. The user can then launch the exe update and turn off the notification by selecting "Don't show notification again for this version".
Save settings and close	Press this button to save the FTP connection configuration and close the dialog box
Next	Press this button to launch download and update on the server.

Database Structure Update

This option is used to check the database structure after an update. It will also display when starting Fidelio Suite8 with a Fidelio V8 version not matching the database structure and the flag DISABLE DATABASE VERSION CHECK not activated under Global Settings → Generic tab. The message: "Program version is different from database version. Do you want to open database update screen?" will appear and if answered with YES, the update process uses the defined settings from the db update tab under global settings to connect to the ftp server and perform the database update or check for downloaded update scripts.

The following information is listed:

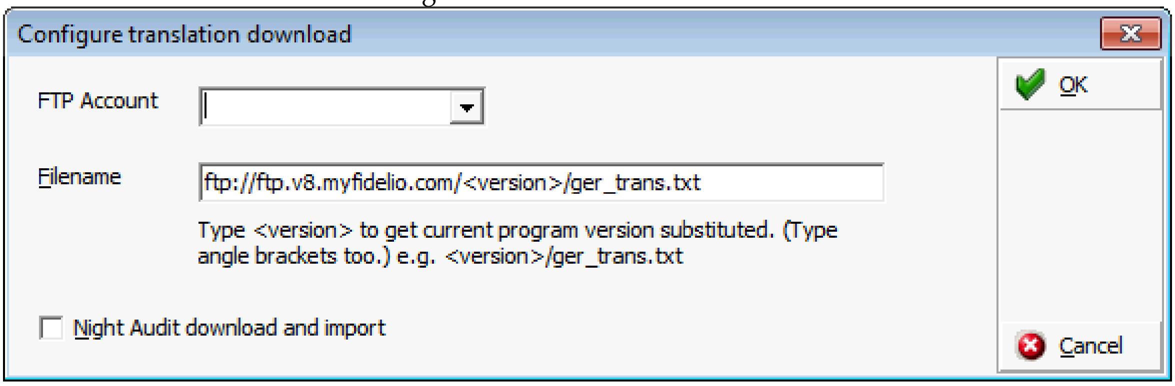
Logged in to:	**Lists the user name and database, e.g. v8live@v8**
Program version:	Lists the current program version, e.g. 8_5_0
Current database version:	Lists the current database version number, e.g. 8_5_0_0
Statement as to whether the database needs to be updated.	For example, "There is no need to update database structure." If the database version differs from the program version, there will be no message.

Available options are:

- OVERRIDE PROGRAM VERSION - use this option to enter a specific program version without performing an update
- VALIDATE DB STRUCTURE - use this option to select an update script from the defined update path under Global Settings → Miscellaneous → DB Update 1 tab
- NEXT - use this option to either check for new update scripts on the ftp server or run the update script and the scripts for the executable updates. Only available if the database version is different from the program version.

Translation Update

This option is used to configure the languages and the FTP connection for the translation download, viewing the status of the import and the last update, and is accessible via the MISCELLANEOUS section of the configuration menu.



Translation Update

Field	Definition	Legal Values
FTP Account	Defines the FTP account to be used. **Note:** FTP accounts are defined via the option FTP ACCOUNT SETUP on the Miscellaneous menu.	
Filename	The name and the path of the translation file. **Note:** Using the version parameter will automatically find the currently installed Fidelio Suite8 version and select the corresponding directory on the FTP server. Example: ftp//ip address of the ftp server/<version> /the name of the translation file.	
Night Audit download and import	Defines if the file should be automatically downloaded and imported during night audit.	Check: YES Blank: NO

Mailing Update

This option is used to create or update only the standard mailing views and fields. All fields and views which have been customized by the property will be kept, however standard views and fields will be set to the latest standard and new standard views or fields will be added.
To have an identifier which views/fields are belonging to the standard a system flag has been added and will be displayed when editing the according view.

How to run the mailing update

1. Click MISCELLANEOUS from the SETUP drop-down menu.
2. Select UPDATES and then MAILING UPDATE.

   The Update Mailing dialog box is displayed.

3. Click the BROWSE button.
4. Locate the mailing.SQL and click OPEN.
5. The path to the mailing.SQL is displayed in the IMPORT FILE box.

6. Click OK button to start the mailing update.

> **Note:** Running the mailing.SQL via TOAD or a SQL Editor deletes all existing records and re-creates the standard ones. This means any customized views or fields are deleted.

Mailing Update functionality is controlled by the user right Mailing Update under Setup → Configuration → Users → User Definition → Rights → Miscellaneous.

The editing of system fields is controlled by the user right Edit system fields under Setup → Configuration → Users → User Definition → Rights → Mailing → Views and Fields.

Materials Control Import

Materials Control

Materials Control is the Enterprise Resource Planning system for both the restaurant and the hotel industries. It uses the newest technologies with proven standards and connects these with the latest requirements. Materials Control is suitable for internal or non-operational tasks of centralization. If you have a Windows supported PC with network binding, the program is immediately operational. Materials Control ensures that you can settle, for example, recipe planning and purchasing with flexibility and speed. Goods employments, actual revenue, inventory - all the data which is relevant for you, may be set in relation to and evaluated according to individual requirements. Beyond that the system is capable of supporting you with your own order advices.

Materials Control can be integrated in to the MICROS FIDELIO POS Systems with the Materials Control Interface in Fidelio Suite8.

With the Materials Control Interface, product and product groups from Materials Control are linked to menu items in Fidelio Suite8. The data is maintained in Materials Control and the interface imports and updates menu items in Fidelio Suite8 with their categories, rates, cost prices and outlets. The import/update can be done manually or during night audit. After importing products, the menu item names need to be checked as some menu item names may need to be changed. Existing Fidelio Suite8 items can be linked to Materials Controls products at any time. In Materials Control the product groups and products which should be imported have to be defined, so that only these products will be created and updated in Fidelio Suite8. Cost prices will be updated each time when running night audit and all other fields will be checked by date and time of change in Materials Control. In Fidelio Suite8 items which have been changed in Materials Control since the last import will be checked and updated accordingly.

The interface provides the following functionality:

- Import of Menu item Categories (Note: Only categories with linked products will be imported)
- Import and Update of menu items with rates, cost prices and outlets
- Running the import and update automatically during night audit
- Running the import manually as well as for selected items

- Linking/ Unlinking of Materials Control products to or from existing menu items
- Automatically update of cost prices during night audit

Prerequisites

- Materials Control Fidelio Suite8.4.00 / 9.65 (Release 01.04.2006) or higher.
- The view MF_CCM_PRODUCT_DETAIL has to exist (Fidelio Suite8 reads from this view).
- Configuration of the product groups which should be imported to Fidelio Suite8. The field CCM has to be filled with 1 for all Food product groups and with 2 for all Beverage product groups for products considered for import to Version 8. Detailed information can be found in the Materials Control documentation.

> **Note:** With Materials Control Fidelio Suite8.4.0.2/10.46 a parameter is available to fill the view MF_CCM_PRODUCT_DETAIL automatically. Detailed information about this can be found in the Materials Control Documentation.

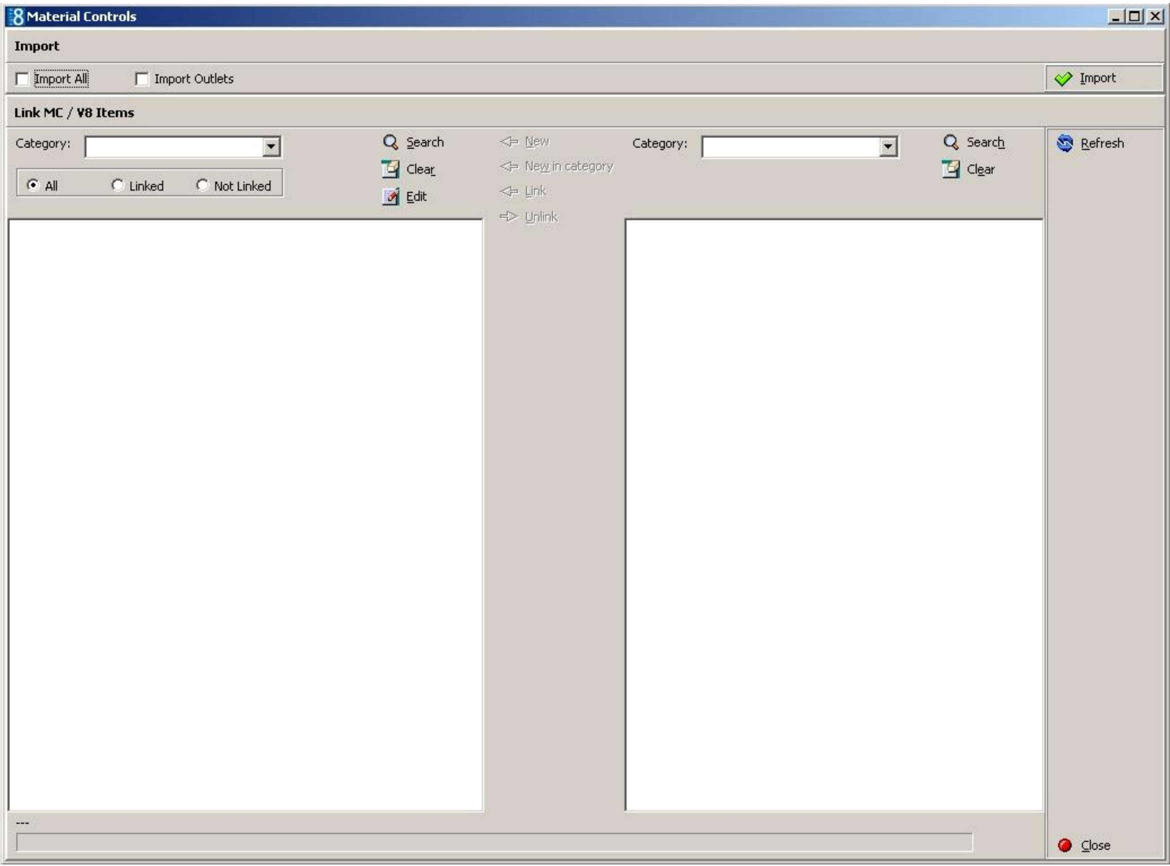
Setting Up Materials Control

1. Enter a valid MATERIALS CONTROL INTERFACE licence code under Setup → Miscellaneous → License → V8 Sublicenses → Software Interfaces.
2. Configure the database connection for materials control, the default responsible department and department code for food and for beverage under Setup → Global Settings → CCM → Conference 2 tab.
3. Run IMPORT OUTLETS under Setup → Miscellaneous → Materials Controls Import.
4. Select the DEFAULT MC OUTLET for materials control under Setup → Global Settings → CCM → Conference 2 tab
5. If the property is using Fidelio Suite8 CCM, the Materials Control products should be linked manually to existing items in Fidelio Suite8. Products existing in Materials Control but not in Fidelio Suite8 can be imported when running Setup → Miscellaneous → Materials Controls Import → IMPORT ALL or imported automatically if the parameter RUN IN NIGHT AUDIT is activated.

   For new installations or properties where no items have been defined all items will be imported either by running Setup → Miscellaneous → Materials Controls Import → IMPORT ALL or imported automatically if the parameter RUN IN NIGHT AUDIT is activated.

Materials Control Import

This option is used to import outlets, run the import for all products as well as linking and unlinking products. The import includes the creation and updating of items with the defined defaults.



> **Note:** The cost prices of all items will be updated each time night audit runs regardless if the parameter RUN IN NIGHT AUDIT is activated or not.

Import options available are:

- IMPORT OUTLETS - used to import the materials control outlets to Fidelio Suite8. In order to define the DEFAULT MC OUTLET under Setup → Configuration → Global Settings → CCM → Conference 2 tab the materials control outlets have to be imported, so this option has to be run as part of the setup process. If a product has been created or changed with the outlet in Materials Control, the outlet will be updated by running Import all option or via night audit. Newly created outlets in Materials Control will be imported with the general import as soon as they are linked to a product.
- IMPORT ALL - after the setup steps for Materials Control have been completed then the IMPORT ALL option has to be run. When it is run for the first time then all Materials Control items where the category has been defined for CCM are imported.

  Each time this option is run newly created Material Control products are imported and existing ones updated if changes were made since the last import of Materials Control. Newly created outlets in Materials Control will be imported with the general import as soon as they are linked to a product. If the parameter RUN IN NIGHT AUDIT is activated then the items will be imported during night audit and if the parameter is not activated then the items have to be imported and updated on a regular basis using this import option.

> **Note:** If Fidelio Suite8 items already exist, it is recommended to link these items manually to prevent double entries. Remaining items will be imported either by running Import all or by running the night audit if the flag Run in Night Audit is activated.

Link MC/ V8 Items

This option is used to query the Fidelio Suite8 and Materials Control items and is split into two sections.

- FIDELIO SUITE8 search criteria are located on the left-hand side of the screen and can be listed by specific category, all, only linked or only not linked items.
- MATERIALS CONTROL search criteria are located on the right-hand side of the screen and can be listed by specific category or all..

All items and products can be listed by either selecting all categories or by pressing the REFRESH button.

Options available are:

- NEW - Select an item from the materials control list and click the NEW button to create the item with all the rate details. If the category is not linked then it will also be created.
- NEW IN CATEGORY - to create a product from a Materials Control category in another Fidelio Suite8 category, click the NEW IN CATEGORY button. An item of the corresponding Fidelio Suite8 category and the Materials Control product that should be created in that category has to be selected, then by pressing New in category button, the selected Materials Control items will be created in that category.
- LINK - a Materials Control product can be linked with a Fidelio Suite8 item by selecting first the Fidelio Suite8 item and then the Materials Control item, then pressing the LINK button, however, although the name of the items is not changed, the article number as well as all rates will be overwritten with the defaults from Material Controls and the valid to date of the rate period will be filled with valid from plus 20 years. When a linked Fidelio Suite8 item is selected then the corresponding Materials Control product will be selected and vice versa. Linked items/products are highlighted grey.
- UNLINK - to remove a link from a Materials Control product, click the UNLINK button. All details except the Materials Control Name and MC POS Interface will remain. The unlinked product will be created then as a new item when running import or night audit.

How to Import Outlets

1. Click MISCELLANEOUS from the SETUP drop-down menu and then MATERIALS CONTROL IMPORT.
2. Select IMPORT OUTLETS and click the IMPORT button.

   A confirmation message is displayed.

3. Click YES, the import is started.
4. When the import is finished an 'Import finished' message is displayed.

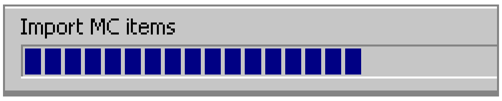
5. Click OK.

How to Import All Materials Control Products

1. Click Miscellaneous from the Setup drop-down menu and then Materials Control Import.
2. Select Import All and click the Import button.

   A confirmation message is displayed.

3. Click Yes, the import is started.
4. The import progress is displayed in a progress bar at the bottom of the screen.



5. When the import is finished an 'Import finished' message is displayed.

6. Click OK.

How to list Fidelio Suite8 items

1. Select a Category from the drop-down list, if no category is selected all categories are displayed.
2. Select to list All items, only Linked items or only Not Linked items.
3. Click the Search button.

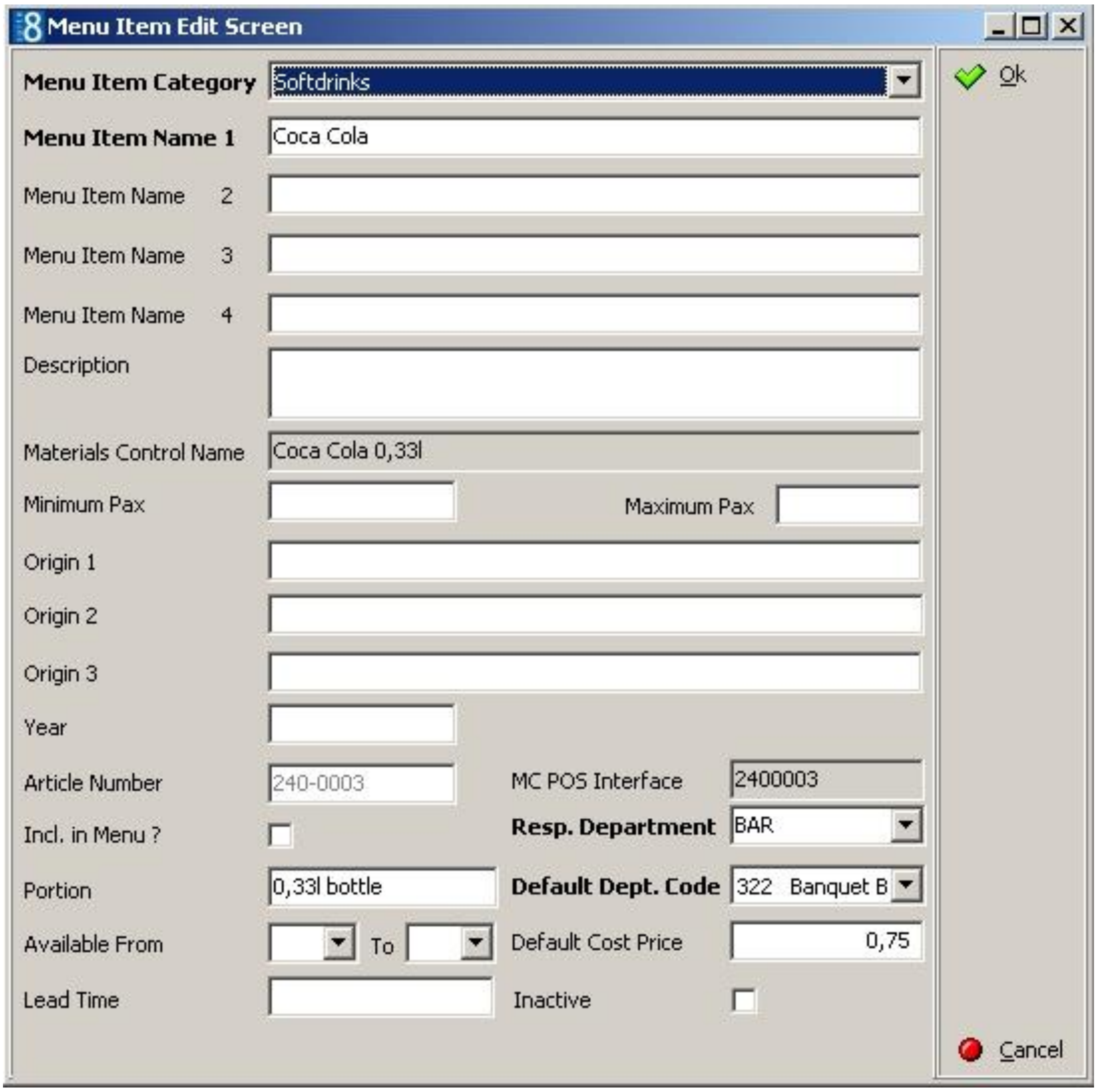
The items meeting the search criteria are listed in the grid, by food and beverage category and then alphabetically by long description. Linked items/products are highlighted grey.

Click the CLEAR button to clear the search criteria.

How to edit Fidelio Suite8 items

1. Select a CATEGORY from the drop-down list, if no category is selected all categories are displayed.
2. Select to list ALL items, only LINKED items or only NOT LINKED items.
3. Click the SEARCH button, the items meeting the search criteria are listed in the grid.
4. Select the item to be edited and click the EDIT button.

   The Menu Item Edit Screen is displayed.



5. Edit the item as required and click OK to save the changes.

How to list Materials Control items

1. Select a CATEGORY from the drop-down list, if no category is selected all categories are displayed.
2. Click the SEARCH button.

The items meeting the search criteria are listed in the grid, by food and beverage category and then alphabetically by long description. Linked items/products are highlighted grey.

Click the CLEAR button to clear the search criteria.

3 Index

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V