Rate-Monitor User Guide

INTRODUCTION

USING THIS MANUAL

Each section consists of a figure/image of that section begin discussed, a tips and techniques section outlining the tips for using a given section and then the "how do I?" section answering common user questions with regards to performing common tasks within a section.

SYSTEM NAVIGATION

Rate-Monitor is a full cycle rate gathering, analysis, and correction solution that can ensure your fleet is always competitively priced. To begin, point your browser to http://www.rate-monitor.com and follow the instructions below.
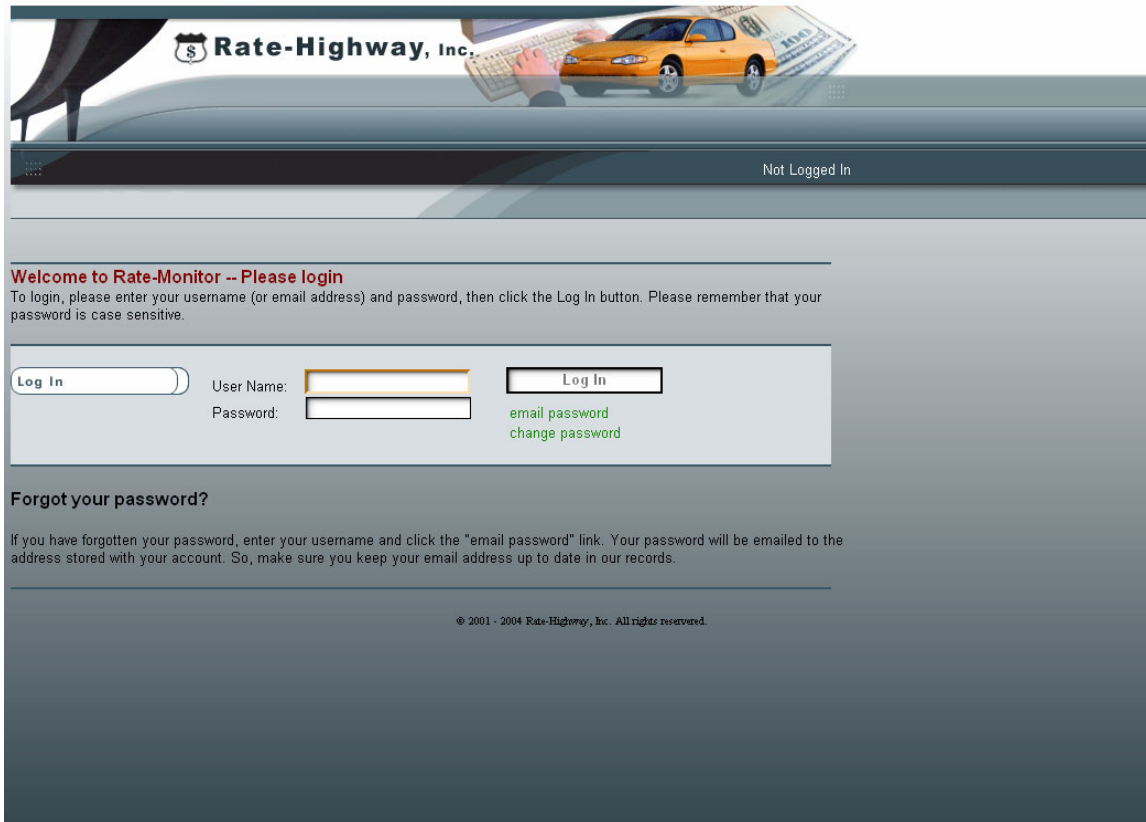
Figure 1

I want to login

Screen	Activity	Action(s)
Welcome	Log in	31. Enter user name
		32. Enter password
		33. Click on the log in button – you will be taken to the Search Queue screen as soon as you log in.

I forgot my password

Screen	Activity	Action(s)

Welcome	Request password	1. I want to set up a NEW Click on 'email password'; a temporary password will be sent to you by email. Use the temporary password as your 'old' password and select a new password (see 'change password' below).

I want to change my password

Screen	Activity	Action(s)
Welcome	Change password	1. Click on 'change password'; you will be prompted for your user name, your old password and your new password. You will also be asked to re-enter the new password, to ensure that there were no wrong keystrokes the first time – you will be taken to the Search Queue screen as soon as you log in.

OVERVIEW

The Rate-Monitor system supports a broad range of options to help you keep your rates competitive: customized rate searches, automated rate changes and user-defined reporting.

Rate search profiles (customized rate searches) are tailored to meet the data gathering requirements for your rate strategy. An unlimited number of unique search profiles can be defined according to your search criteria and searches can scheduled to run on a timetable that meets each user's unique requirements. Additionally, customized ad hoc searches can be run on an as-needed basis.

Rate alert rules then review the data collected by the rate searches to identify the critical conditions that you have defined and to make recommendations for automated changes to your rate management system – again, according to your rate strategy.

Rate search reports provide you with both summary level and detailed comparison data on your price position. Rate reports also furnish the mechanism by which you manage automated updates to your rate system.

COLLECT RATES

The first step in generating your reports is to select or create as many rate search profiles as needed to provide you with the data you need. A profile is a unique set of search criteria that is the basis for an internet rate search; profiles can be saved and scheduled to run at user-defined intervals. A single profile can gather rental rates for multiple car types, from multiple locations, from multiple companies; however, each profile is associated with a single data source (e.g., Expedia, Travelocity, etc.), so multiple profiles may be necessary to gather similar data from each of the sites you want to monitor. Each profile targets a single rental period – as well (e.g., weekday daily, weekly, week-end, etc.), so again, several profiles are needed to meet your needs for multiple reporting periods.

After a search profile has been created and scheduled, it can be executed, capturing your competitors' rates in real time from the internet sources that you requested. Using the search parameters you defined in the profile, your competitors' rates are gathered for reporting (Rate Detail Report) and as input to the rate alert rule evaluation and reporting (Rate Rule Alert Report).

Rate-Monitor has the following tools available to simplify developing and managing your rate search profiles:

Search Profiles screen

The Search Profiles screen is recommended as the entry point for creating and maintaining your search profiles. The screen presents a list of search profiles that can be viewed in summary or detail to locate profiles for maintenance or as the model for building a new search profile..

Depending on your account permission, you can view and execute your own search profiles or those of others in your organization.

Search Queue screen

The Search Queue screen can be used to retrieve Rate Detail Reports should you wish to view the detail behind rate change recommendations or the results of an a search.

Again, you can view your own search results or those of others in your organization (if you have permission to do so).

Search Criteria screen

The Search Criteria screen is linked to the *Search Profiles screen* and is used to define or modify a search profile's criteria and to kick off a search. Alternatively, power users may go directly

to this screen to create a new search profile, to change an existing profile or to kick off a search.

Rate Detail Report

The Rate Detail Report is generated as each Rate Search Profile has completed and provides search detail behind the rate comparisons that will be performed in the next step.

COMPARE RATES

Rate-Monitor's rate sophisticated rule-driven evaluation is the differentiating feature of this powerful application. After a search profile has been executed and the rates have been collected rates from the data source, the user-defined rate rules developed to execute a specific rate strategy will compare the search results and propose new rates in line with the rate strategy.

Rules can be built to stand alone or to execute sequentially as a more complex rule – subsequent rules can execute either upon success (meeting criteria) or failure (no criteria met). If the update criteria are met, the system will notify you and – if instructed to do so – will automatically update your integrated rate system in the '**Correct'** step.

As soon as the rate comparison is completed, Rate-Monitor can send out email notifications (Alerts!) with the attached report(s). One report will provides details on searches and the other will allows you to review the proposed rate changes so that either you or the automated link to your rate system can change your rates to meet and beat your competition.

After both the Rate Detail Report has finished processing, they are emailed to the owner (the email address associated entered when creating the search profile with the user login). The owner should then review the Rate Rule Alert Report to approve or reject the rates proposed by Rate-Monitor (based on the user-defined Rate Alert rules) and to submit the accepted changes for update. The Rate Detail Report is available as a supplement should you wish to view the detail behind the proposed rates.

Each step in the process of generating and reading a rate report is detailed in this section. Most sections have a tips and techniques quick reference, followed by step-by-step instructions. To begin, scan the tips and techniques section and then click on the tab referenced at the top of the screen (see highlighted area) and follow the instructions.

Alerts! screen

Here, rate alert rules are developed, based and are linked to the rate search profiles you've already built. The rules will evaluate the associated rate report's results against the criteria established in the rule.

CORRECT RATES

Rate Rule Alert Report

The Rate Rule Alert Report is generated after each Rate Rule completes, comparing results and proposing changes to your rate structure based on the parameters defined. Using this report, you may selectively make the recommended updates to your integrated rate management system. If you do not have an integrated system, you may make the recommended changes manually.

Rate Monitor – Customer Processes

1. Set up rate search criteria (only once per profile)

2. Set up report frequency (only once per profile)

3. Set up Rate Alert rules (only once per rule)

4. Receive and review Rate Rule Alert Report

    a. Submit proposed rate changes for update

5. OPTIONAL: Receive and review emailed Rate Detail Report

6. OPTIONAL: Locate and review reports from Rate-Monitor Search Queue

7. OPTIONAL: Make any manual rate changes dictated by rate strategy

Rate Monitor – Automate d Processes

1. Generate Rate Detail Report and Rate Rule Alert Report, per customer definition

2. Email Rate Detail Report and Rate Rule Alert Report to customer

3. Update rate system, per customer instructions

COLLECT: WORKING WITH SEARCH PROFILES

Search Profiles presents a list of search profiles, or saved search criteria, for maintenance and/or to generate a search report. You can view and execute your own search profiles or those of others in your organization.

SEARCH PROFILE MANAGER SCREEN

Figure 2

Tips and Techniques

Search Profiles: Tips and techniques	
View or change Profile details (single profile)	**Click on the green hyperlink** under 'Profile Desc.' to view the profile's search selections in detail
View Profile details (all profiles)	**Click on the 'Extended View' hyperlink** above or below the list to view the search selections in detail for all profiles
Return to condensed view (all profiles)	**Click on the 'Standard View' hyperlink** above or below the list for the standard view of the search selections
Export profile details to Excel	**Right click on the green hyperlink** to view the profiles search selections in detail

I want to copy and change a profile to set up a NEW Ad Hoc search

Section	Field	Action
Profile list	Details	1. Click on the green hyperlink to view the profiles search selections in detail; you will be taken to the **Search Criteria screen**
Search Criteria	All search criteria fields	2. See next section (Create new search profile) for details about search criteria fields
Search Criteria: Actions	Scheduled Search Time	3. After making the profile changes for your ad hoc report, select 'Perform Search Now' from the dropdown list of search times
	Submit Request	4. Click on 'Submit Request'

I want to copy and change a profile to set up a NEW scheduled search

Section	Field	Action
Maintenance	Copy profile (same or different user)	1. Complete the copy action described below
Profile list	Details	2. Click on the green hyperlink; you will be taken to the Search Criteria screen
Search Criteria	All search criteria fields	3. See next section (Create new search profile) for details about search criteria fields
Search Criteria: Actions	Scheduled Search Time	4. Select the Search time and day(s) from the available search times
Search Criteria: Profile	Profile	5. After making all needed changes for your scheduled report, save the profile by moving to the top of the page and clicking on 'Save'
Search Criteria: Actions	Submit Request	6. Click on 'Submit Request'

I want to copy a Search Profile (same user)

Section	Field	Action
Maintenance	Copy profile (same user)	1. Find and select the profile you would like copied
		2. Go to the bottom of the page and select the "Copy Profile (Same User)" radio button
		3. Enter the name of the new copied profile
		4. Press 'Submit'

I want to copy a Search Profile (different user)

Section	Field	Action
Maintenance	Copy profile (same user)	1. Find and select the profile you would like copied
		2. Go to the bottom of the page and select the "Copy Profile (Same User)" radio button
		3. Enter the name of the user to whom the copied profile will be assigned
		4. Press 'Submit'

I want to disable a Search Profile

Section	Field	Action
Maintenance	Disable profile	1. Find and select the profile you would like disabled by clicking on the check box to its left
		2. Go to the bottom of the page and select the "Disable Profile" radio button
		3. Press 'Submit'

I want to re-enable a disabled Search Profile

Section	Field	Action
Maintenance	Enable profile	1. Find and select the profile you would like enabled by clicking on the check box to its left
		2. Go to the bottom of the page and select the "Enable Profile" radio button
		3. Press 'Submit'

I want to delete a Search Profile

Section	Field	Action
Maintenance	Delete profile	1. Find and select the profile you would like deleted
		2. Go to the bottom of the page and select the "Delete Profile" radio button
		3. Press 'Submit'

SEARCH CRITERIA SCREEN

Figure 3

Tips and Techniques

Search Criteria: Tips and techniques	
Copy an existing profile (rather than start from scratch) and modify	See section 'Working with Search Profiles'.
	To highlight several selection items at once, hold down the <Ctrl> key while clicking on your selections. Use the single arrow to move one or more items from one box to the other or use the double arrow to move ALL items from one box to the other.
Scheduled search based on a **new** Search Profile	**Leave 'Default' in the profile selection** and enter a descriptive name for your new profile in the blank text box to its right. Make all desired selections. When you are satisfied with your selections, click on 'Save As' (above the new profile name in the profile section) **before** submitting your request.
Scheduled search based on modified Search Profile.	**Select the profile** from the drop down list and click on 'Open'. When you are satisfied with your changes, return to the profile section, click on 'Save' (above the profile name) **before** submitting your request.

Scheduled search based on a **new** profile copied/modified from an existing Search Profile	**Select the profile** from the drop down list and click on 'Open'. Enter a descriptive name for your new profile in the blank text box to its right. Make all desired changes and click on 'Save As' (above the new profile name in the profile section) **before** submitting your request.

I want to set up a new search

Section	Field	Action
Profile	(Profile Name)	1. Select from the following options: - Bypass this section if no profile needed (e.g., ad hoc search) - Select profile name and click on 'Open' to modify or to copy an existing profile
	(New Profile)	2. Enter new profile name if new search criteria (profile) will be saved
City/Location	Unselected Cities	3. Select the pick up city – the return city is assumed to be the same.
Rental Dates	Begin / End	4. Enter date range for search by clicking on the date on the pop-up calendar or by entering the date directly into the text field.
	ABP(Relative) or Absolute	5. Select from the following options: - **Date Absolute** for one time or ad hoc rate search reports - **Date Relative** for saved and scheduled search profile. This will allow you to search the profile a certain number of days out for the specified number of days
Days of the week		6. Select one or more days of the week for the system to search.
Details	Begin / End	7. Select a Pick up and drop off time.
	Length of Rent	8. Select the Length of Rent. The length may be from 1 to 32 days or you may select daily, weekend or weekly rates.
	Data Source	9. Select the Data Source; you may select from the following options: - **All sites** will return rates from all sites requested in the next section, branded or not - **Branded sites** will return rates only from the branded sites (identi-

Section	Field	Action
		fied by an asterisk) that are requested in the next section **- Clicking on a single site** will return rates from that travel site (e.g. Orbitz, Travelocity or Expedia) only
Car types and companies	Unselected Types (Add Selection)	10. Highlight the car types that you want included in your report and use the right arrows to move them into the selected column.
	Selected Types (Remove Selection)	11. Highlight the car types that you want removed from your selection and use the left arrows to move them back to the unselected column.
	Unselected Companies	12. Highlight the companies that you want included in your report and use the right arrows to move them into the selected column.
	Selected Companies	13. Highlight the companies that you want removed from your selection and use the right arrows to move them back to the unselected column. 14. Note: Be sure to include the comparison company.
Display Options	Comparison Company	15. The company against which the competitor rates are compared – typically, your company.
	Rates Shown	16. Not currently available for modification.
	Currency	17. The currency in which rates will be displayed.
Rate Changes		18. Not currently available for modification.

I want to define report delivery options

Section	Field	Action
Actions	Presentation	19. Presentation is pre-selected as html
	Action	20. Select from the following options: **- Search** produces the report but no email notification will be sent when it is ready to view **- Search and email alerts** produces the report and an email notification when it is ready to view

Section	Field	Action
		- **Search and email all** produces the report and an email notification when it is ready to view
	Email address	21. Enter the email address where you want to receive notification
	Shop POS	22. Select your country from the drop down list - currently all companies are in the US
	Airline Arrival Required	23. Disregard
	Discount Code	24. Disregard
	Scheduled Search Time	25. Select from the following options: - For an **ad-hoc search**, select 'Perform Search Now'. - For a **scheduled search**, select the time of day and the day(s) of the week that you want the search report to be executed.

I want to be notified when my search is finished

Section	Field	Action
	Action	26. Select the following option: **- Search and email alerts:** this produces the report and an email notification when it is ready to view
	Email address	27. Enter the email address where you want to receive notification

I want to submit my Ad Hoc search

Section	Field	Action
Actions	Submit Request	28. Click to launch the search.

OR

I want to save and submit my scheduled search

Section	Field	Action
Profile		28. Scroll to top of form and click 'Save' OR 'Save As' button to save the search profile.
Actions	Submit Request	29. Click to place the search in the queue (scheduled search).

SEARCH QUEUE SCREEN (LOCATE SEARCH REPORTS)

Once completed, reports can be viewed by anyone in your organization for six days. The Search Queue presents a list of completed rate searches, identifiable by profile name, that have been executed on the current day and for one to five days back.

Figure 4

Tips and Techniques

Search Queue: Tips and techniques	
Extended View	**Click on the Extended view hyperlink** to see rate report search criteria in detail.
Cancel search	**Click on check box to the left** of the report (which must not have yet been run) and click on the 'Cancel' hyperlink both above and below the list of search reports.
Condensed (Standard) view	**Click on the Standard view hyperlink** to see rate report search criteria overview.
Auto-update the list of to-day's searches	**To watch for the completion of a request**, simply check this screen periodically. If you leave your browser set to this screen, it will refresh itself automatically and the status reports that have just run will be updated and new requests will be shown without any user intervention. **The prior days' list of reports** does not have the auto-refresh feature, since a status or list cannot change.

Find Rate Report (from list)

Section	Field	Action
List	Search ID	1. Scroll through the list of completed searches until a search matching the desired date and profile is located. Click on the green hyperlink

Find Rate Report (using Search)

Section	Field	Action
Search	User Name, City, Car Type, Company	1. Enter as many key words to the search text boxes as needed) to identity the desired rate reports (boxes can be left blank. Press 'Display'.
	Report list	2. Find the report that you requested (either in the list of rate reports by day or from the results of your search).
	Search ID	3. Click on green hyperlink in the Search ID column and the requested report will open

THE RATE DETAIL REPORT

Rate Detail

[LAX ▼], [CCAR ▼] [Display]

LAX, CCAR

	Enterprise	Advantage	Alamo	Avis	Budget	Dollar	Payless
Tue - 5/3/2005	134.00	145.48	124.95	149.99	134.99	99.99	114.50
Wed - 5/4/2005	116.95	145.48	124.95	149.99	134.99	99.99	114.50
Thu - 5/5/2005	116.95	145.48	124.95	149.99	134.99	99.99	114.50
Fri - 5/6/2005	116.95	145.48	127.95	145.99	130.99	99.99	114.50
Sat - 5/7/2005	116.95	145.48	127.95	145.99	130.99	99.99	114.50
Sun - 5/8/2005	116.95	145.48	127.95	145.99	130.99	99.99	114.50
Mon - 5/9/2005	116.95	145.48	127.95	145.99	130.99	99.99	114.50
Tue - 5/10/2005	116.95	145.48	127.95	145.99	130.99	99.99	114.50
Wed - 5/11/2005	116.95	145.48	127.95	145.99	130.99	99.99	114.50
Thu - 5/12/2005	115.95	145.48	127.95	145.99	130.99	116.99	114.50
Fri - 5/13/2005	115.95	145.48	127.95	145.99	130.99	116.99	114.50
Sat - 5/14/2005	115.95	145.48	140.95	145.99	130.99	116.99	114.50

Report Legend

Locations:	LAX
Companies:	Enterprise, Advantage, Alamo, Avis, Budget, Dollar, Payless
Data Source:	Travelocity
Dates:	Tuesday, May 03, 2005 to Saturday, May 14, 2005, Sun, Mon, Tue, Wed, Thu, Fri, Sat
Car Types:	CCAR
Pickup/Drop-off:	LOR 8; Pickup 9:00:00 AM; Drop-off 9:00:00 AM
Comparison company:	Enterprise

For more information:

Click to view the Web FAQ
Click to view the GDS/Sabre FAQ

Sample report

How do I read the Rate Detail Report?

Section	Field	Action
Select View	Airport code / Car code	4. Drop down list of airport codes that were included in the search profile; each combination of airport code and car type results in a separate report. Select each of the airport / car code combinations that you wish to view and click on 'Display'.

Report body	Date	5. The date for which the rate search was performed
	Comparison company	6. The comparison vendor (your company) is the first named column at the left of the report. Its rates are always in black.
	Requested companies	7. The vendors to be compared (your competitors) against the comparison company follow to the right. Their rates will be displayed in red, green, or black. Occasionally you will see a message in place of the rate. The meanings are as follows:
		8. - Red rates are lower than the comparison company's
		9. - Green rates are higher than the comparison company's
		10. - Black rates are the same as the comparison company's
		11. - Closed indicates that the car type is not available on a certain day for a certain website (i.e. it is sold out)
		12. - GDS Link is displayed when there is a failure between the GDS link and a website. Since the website's GDS link is **temporarily** unavailable we notify our users with the "GDS Link" message
Report Legend		13. The detailed search criteria that was used to generate the report.

COMPARE: WORKING WITH RATE ALERTS

ALERTS! SCREEN (RATE RULES)

Rate rules are the heart of the Rate-Monitor system – here you will define and execute your rate strategy in terms of your competitors.
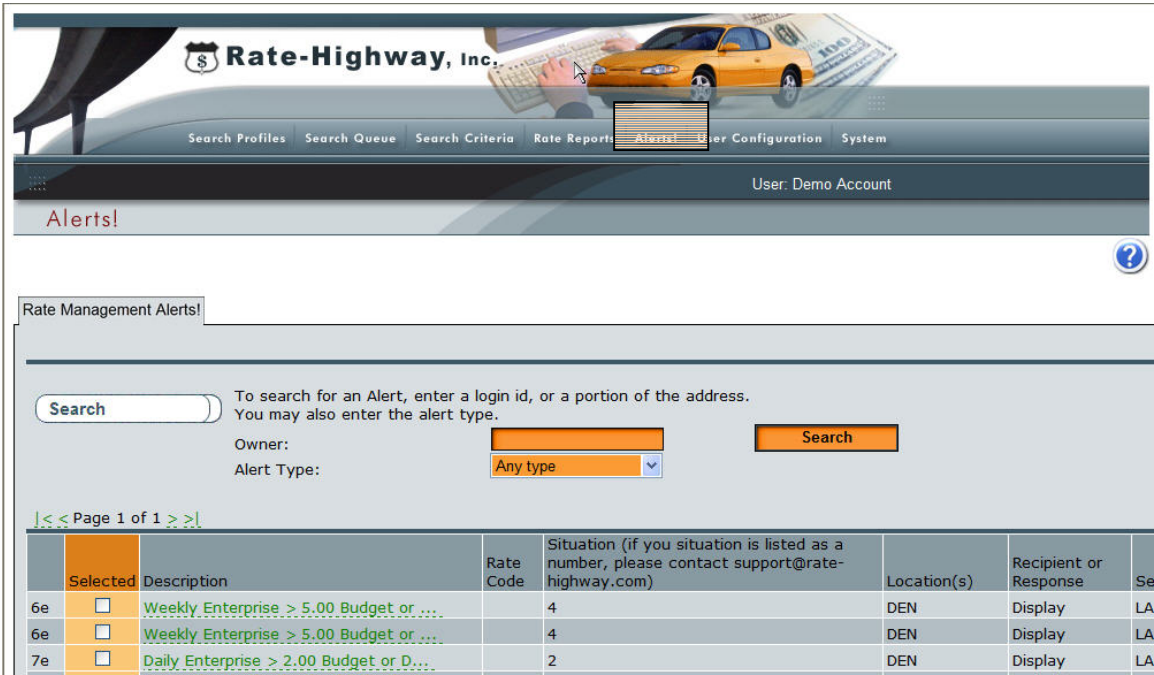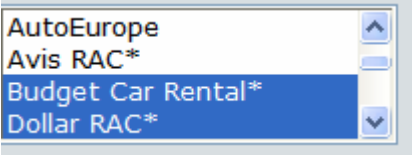

Figure 5

Tips and Techniques

Maintain Rate Alerts: Tips and techniques	
Combining multiple rate profiles into a single rate alert	**Since each rate profile is linked to only one data source**, you may want to combine similar profiles into one rate alert. For instance, if you want to remain $5.00 below the lowest ECAR rate found in your comp set when comparing week-day daily rates out of LAX, you can select each of the profiles that search rates based on these parameters but against different data sources.
Set up Rolling Alert (rate effective date moves in relation to search date)	**Click on the calendar** next to rule begin date and select a date that is the desired number of days into the future for comparison. Do the same for the rule end date. The number of days between the current and the rule begin day will remain constant as the dates change. **Click on 'Rolling begin & end'.** **Enter 'continuous'** for rule pick-up begin date; do the same for pick-up end date. **Example:** today's date is May 3, 2005 and I want to look at rates from 10 through 15 days in the future starting today and continuing until I disable the rule. <table><tr><td>Rule begin date:</td><td>May 13, 2005</td></tr><tr><td>Rule end date:</td><td>May 18, 2005</td></tr><tr><td>Rolling begin & end:</td><td>Checked (yes)</td></tr><tr><td>First pick-up</td><td>Continuous</td></tr><tr><td>Last pick-up</td><td>Continuous</td></tr></table>
AutoEurope Avis RAC* Budget Car Rental* Dollar RAC*	**To highlight several selection items at once**, hold down the <Ctrl> key while clicking on your selections.
To stop receiving results from a rule-profile combination (one profile)	**If the rule has only one linked profile**, disable the rule. It will not be deleted but will not appear in the list of rules and results will not be generated.
To change a profile linked to the rule (regardless if there is one or more than one linked profile(s))	**Modify the (change the profile selection) and save the rule** after verifying that its criteria falls within the search profile's parameters.
To unlink a single profile from an Alert rule that has more than one linked profiles	**Do not disable the rule** (it will disable all rule-profile combinations), but instead modify the rule by removing the desired profile and saving the rule.

I want to set up a NEW Rate Alert – step 1

Section	Field	Action
Note: Each Rate alert is linked to one or more specific profiles and will not execute if the alert's selections are outside the boundaries of the linked profile. It is strongly recommended that you perform the next steps prior to defining your rate alert.		
Rate-Monitor tabs		1. Click on "Search Profiles" tab to go to Profile Manager
	Maintenance	2. Click on 'Export profile list to Excel'
Windows dialog box	File download	3. Click on 'open' to view the profiles immediately or to print them; otherwise, click on 'save' to save the list of profiles and their details to your hard drive
Excel		4. A list of all your profiles is presented with profile details in the columns immediately to the right of the profile name. You can hide the profiles that you are not going to use for your rule to make errors less likely.
		5. Use the profile(s)'s details as a reference while defining the alert rule.

I want to set up a NEW Rate Alert – step 2

Section	Field	Action
Rate-Monitor tabs		1. Click on "Alerts!" tab to go to Alerts Manager
Maintenance	Rate Change Alert No.	2. System will assign number
	Description	3. Describe the alert in a way that you will recognize it's purpose later
	Rule Begin Date	4. This date describes the beginning of the period during which the alert rule is <u>valid</u> for execution (but <u>not</u> necessarily the dates on which it will be executed). Select one of the following: - explicit date: enter the date or click on the calendar date - continuous: period of validity will start immediately - blank: same as 'continuous'

	Rule End Date	5. This date describes the end of the period during which the alert rule is <u>valid</u> for execution (but <u>not</u> necessarily the dates on which it will be executed). Select one of the following: - explicit date: enter the date or click on the calendar date - continuous: period of validity will start immediately - blank: same as 'continuous'
	Rolling begin & end	6. Click to indicate that the validity period will "roll" or move in relationship to the pick up date. See 'Tips and Techniques' for examples. For example, your rule is to search rates for 10 days in the future against your criteria. You would enter
	First Pick-up	7. This date is the beginning of the period during which the alert rule will be <u>executed</u>. (The date must fall between the rule begin and end date.) Select one of the following: - explicit date: enter the date or click on the calendar date - continuous: data collection will start immediately - blank: same as 'continuous'
	Last Pick-up	8. This date describes the end of the period during which the alert rule will be <u>executed</u>. The date must fall between the rule begin and end date. Select one of the following: - explicit date: enter the date or click on the calendar date - continuous: data collection will start immediately - blank: same as 'continuous'
	System Rate Code	9. <u>If you will use Rate-Monitor to update your rates</u>, enter the rate code you use to describe your rates; otherwise leave blank.

	Car companies: competitive set	10. Select as many car companies from those included in your profile(s) for your comp set.
	Car companies: comparison company	11. Generally this is your company, but you may select as many car companies as needed from those included in your profile(s).
	Car companies: LOR(s)	12. Select the desired LOR for this alert rule, based on the rate code selected on 'System Rate Code'.
	Car companies: Location(s)	13. Select as many locations from those included in your profile(s) as needed for this alert
	Car types: car type(s)	14. Select the car types from those included in your profile(s) that you want to be compared; select N/A to have all car types included in your profile(s) compared and matched against the comparison type.
	Car types: comparison car type(s)	15. Select the car types from those included in your profile(s) to be compared against; select N/A to have all car types compared and matched against the comparison type.
	Rate Source	16. Do not change; this will be determined by the profile selected in a subsequent step.
	Situation	17. Select the situation that will trigger an alert notification.
	By amount	18. The amount that completes the situation described in step 16. Select from the following: - Whole dollar – fill in the dollar amount that completes the rule - Percentage – fill in the percentage amount that completes the rule Click on 'Ignore closed rates' if you don't want to include closed rates in the comparison.

	Quantity & Period	19. Further refine the situation triggering the alert. Select from the following: - Each time it occurs – no further entries required - After X events – complete the next field (No. of events) also - After X events in X hours (or days) – complete the next two fields. You can indicate either hours or days by selecting from the drop down list.
	Response	20. <u>If you will use Rate-Monitor to update your rates</u>, enter the action that you want the system to take from the drop down list.
	Amount	21. Enter the amount (and click on either dollars or percentage) by which you want your system updated if your rate alert criteria is met.
	Search type (profiles)	22. Select the rate search profile – one or several – that you want to build the alert for.

	Rate range: Minimums
	
	Setting up Min/Max schedules
		23. The lowest value that a given rate should be (this helps identify competitor misprints that could otherwise result in lower rates than are allowable) when applying the response defined in the rule.
		
		    a. To create range minimums for multiple car types, click on the "Manage schedules" link.
		
		    b. A new window will pop up. To create a new schedule, enter the name of the schedule name you would like to create and press the "Next" button.
		
		    c. It will bring up a grid which will allow you to enter minimums and maximums for your rules.
		
		    d. When you are finished, press the "Save" button.
		
		    e. Lastly, you will need to go back into the rule you are setting up and select the name of the min/max schedule you want linked to the rule

	Rate range: Maximum Setting up Min/Max schedules	24. The highest value that a given rate should be (this helps identify competitor misprints that could otherwise result in higher rates than are allowable) when applying the response defined in the rule. a. To create range minimums for multiple car types, click on the "Manage schedules" link. b. A new window will pop up. To create a new schedule, enter the name of the schedule name you would like to create and press the "Next" button. c. It will bring up a grid which will allow you to enter minimums and maximums for your rules. d. When you are finished, press the "Save" button. e. Now, you will need to go back into the rule you are setting up and select the name of the min/max schedule you want linked to the rule
	Evaluate on success	25. This establishes a hierarchy of rules; if this rule is successful (i.e., one or more of the criteria is met), the next rule – as defined here – will be evaluated before any automated rate updates or notification will occur. This field can be left blank (no follow-on rule).
	Evaluate on failure	26. This establishes a hierarchy of rules; if this rule fails (i.e., none of the criteria is met), the next rule – as defined here – will be evaluated before terminating the process. This field can be left blank (no follow-on rule).

	Utilization range: Days out	27. The 'column headings' describing the days out in your company's actual or theoretical utilization schedule.
	Utilization range: Maximum	28. The minimum utilization commitment needed before the rule should result in an automated rate change.
	Utilization range: Minimum	29. The maximum utilization commitment needed before the rule should result in an automated rate change.
	Utilization schedule	30. Do no change; utilization rules based on the schedule above.
	Update	31. Click on 'Update' to save.

I want to change a Rate Alert rule

Section	Field	Action
Profile list	Description	1. Find the profile you would like to change from the list of alerts and click on the green hyperlinked description.
Maintenance	All fields	2. Make changes as needed (see prior section).
	Update	3. Click on 'Update' to save changes as a new rate alert.

I want to copy and change a Rate Alert rule to make a new rule

Section	Field	Action
Profile list	Description	1. Find the profile you would like copied from the list of alerts and click on the green hyperlinked description.
Maintenance	Save as copy	2. Click on check box.
	Description	3. Enter a new or revised description.
	All fields	4. Make changes as needed (see prior section).
	Update	5. Click on 'Update' to save changes as a new rate alert.

I want to disable a Rate Alert rule

Section	Field	Action
Profile list	Selected	1. Find and select the alert rule you would like disabled by clicking on the check box to its left

	Hyperlinks	2. Go to the bottom of the list and click on the green 'Disable' hyper-link

I want to view disabled Rate Alerts

Section	Field	Action
Profile list	Display disabled rules	1. Click on the 'Display disabled rules' checkbox at the bottom of the list
Browser	Tool bar	2. Click on the refresh icon at the top of your browser

I want to re-enable a disabled Rate Alert

Section	Field	Action
Profile list	Display disabled rules	1. Click on the 'Display disabled rules' checkbox at the bottom of the list
Browser	Tool bar	2. Click on the refresh icon at the top of your browser
Profile list	Selected	3. Find and select the profile you would like enabled by clicking on the check box to its left
	Hyperlinks	4. Go to the bottom of the list and click on the green 'Enable' hyper-link

I want to delete a Rate Alert

Section	Field	Action
Profile list	Selected	1. Find and select the alert rule you would like deleted
		2. Go to the bottom of the list and click on the green 'Delete' hyperlink **Caution**: do not delete a rule that you think you may want to use later.

CORRECT: CONFIRM AND UPDATE RATES

RATE RULE ALERT REPORT

This tool allows you to review the changes proposed by your rate rule and select those that you want applied to your rate management system.

How does the Rate Rule Alert Report change my rates?

Rate-Highway, Inc.

Copyright (c) 2001-2004, Rate-Highway, Inc. All Rights Reserved.

Rate Rule Alert Report - Updateable

Id	Update	Alert Description	Rate Code	Proposed Rate	Diff.	City	Car Type	Pick-up	LOR	Current Rate
144489	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$48.99	$2.00	LBB	ICAR	5/17/2005	2	$46.99
144503	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$53.99	$4.00	LBB	FCAR	5/17/2005	2	$49.99
144517	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$41.99	$2.00	LBB	CCAR	5/17/2005	2	$39.99
144518	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$41.99	$2.00	LBB	CCAR	5/18/2005	2	$39.99
144504	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$53.99	$4.00	LBB	FCAR	5/18/2005	2	$49.99
144490	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$48.99	$2.00	LBB	ICAR	5/18/2005	2	$46.99
144491	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$19.99	($27.00)	LBB	ICAR	5/19/2005	2	$46.99
144505	☐	LBB $1.00 Less that Avis and Hertz on daily shops		$23.99	($26.00)	LBB	FCAR	5/19/2005	2	$49.99
	☐	LBB $1.00 Less that Avis and Hertz on daily								

Figure 6

Tips and Techniques

Rate Rule Alert Report: Tips and techniques	
Select all rates for update	**Click on the green 'Select All' hyperlink** to select all rates.
De-select all rates for update	**Click on the green 'Unselect All' hyperlink** to deselect all rates.
View source Rate Detail Report	**Click on the green 'click to view source report' hyperlink** to view the rate profile results associated with the rate rule that generated the proposed changes.

How do I read the Rate Rule Alert Report?

Section	Field	Action
Results list	ID	1. System-generated identification.
	Update	2. Check-box indicating that rate should be applied (for integrated rate management system only).
	Alert description	3. User-assigned name identifying rate rule. See Rate Rule setup.
	Rate code – Util. level	4. See Rate Rule Alert Report legend at bottom of report

How do I update my rates? (Integrated rate management system)

Section	Field	Action
Results list	Update	1. Click on each check-box where you want the system to be automatically changed to the proposed rate.
	Perform Update	2. Click on 'Perform Update' and Rate-Monitor will update your system automatically.

How do I update my rates? (Non-integrated rate management system)

Section	Field	Action
Results list	Update	1. Identify each proposed rate that you want to change in your system.
		2. Make changes manually.