Engine

Admin User Guide: Direct Bill

State of Texas Customer Support (800) 803-0452 support@engine.com



Introduction: Administrator

Engine is the mandated contract hotel booking and management platform for the State of Texas. As a State of Texas employee, you have access to more hotels and lodging rates in Texas and across the United States at or below GSA rates than ever before.

This guide will walk you through all functionality on Engine for the Administrator role, which has access to all functionality on the platform.

This guide will cover how to create an account and set up a profile, followed by step-by-step explanations of all platform functionality organized by each tab on your Engine dashboard.











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State of Texas

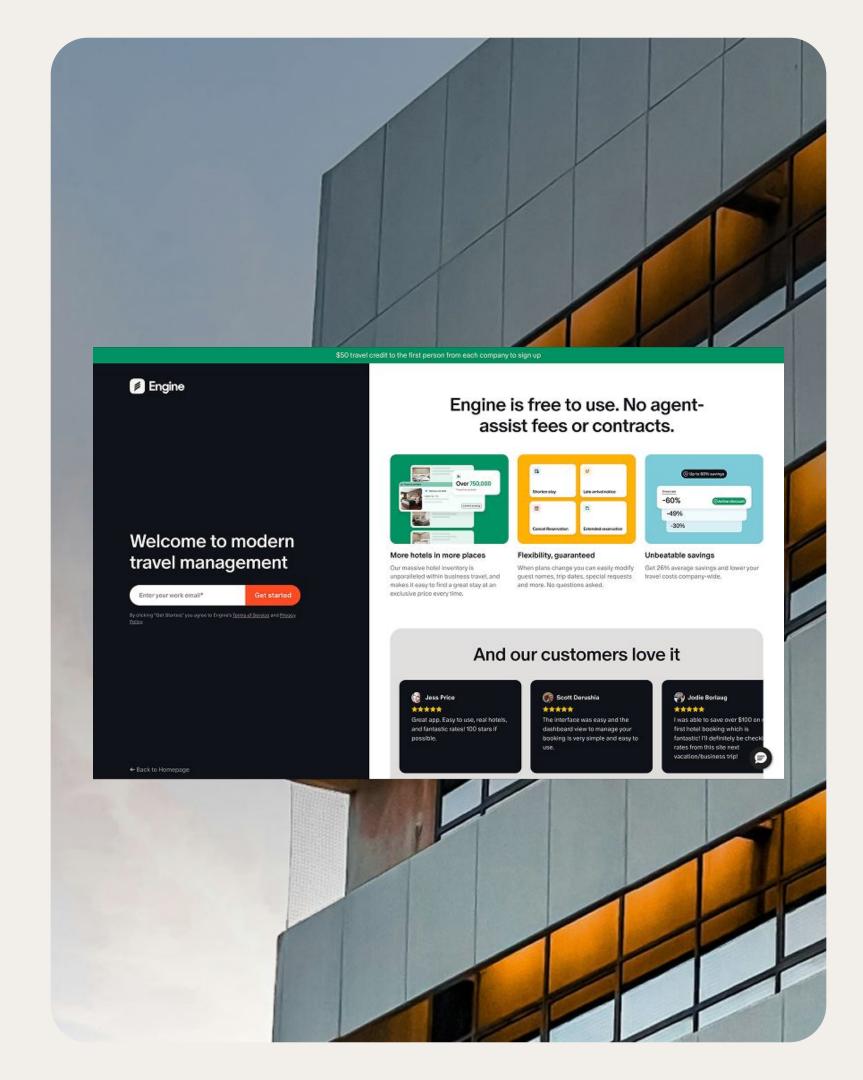
Create your account

You're invited to Engine

You will receive an email asking you to accept your invitation to create your account. Click the Accept Invitation button.

Create your password

You will be redirected to a page that asks you to create your account. Join using your state email address and set your password.



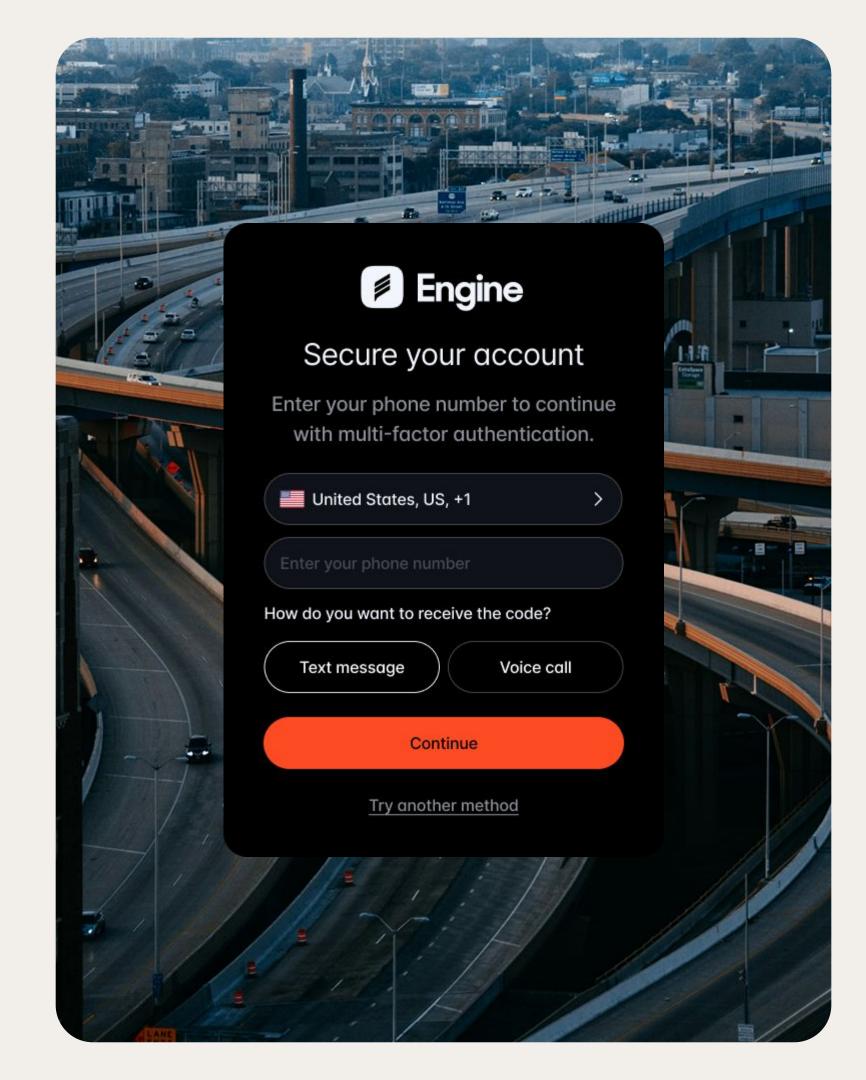
Create your account

Complete 2-step verification

Follow directions to complete 2-step verification using your phone number. This is a required step, but your phone number will only be used to verify your identity.

Confirm your email

You will receive an email asking you to confirm your email address. Click the Confirm Email button and then you're in! You will be directed to the Engine member home page.



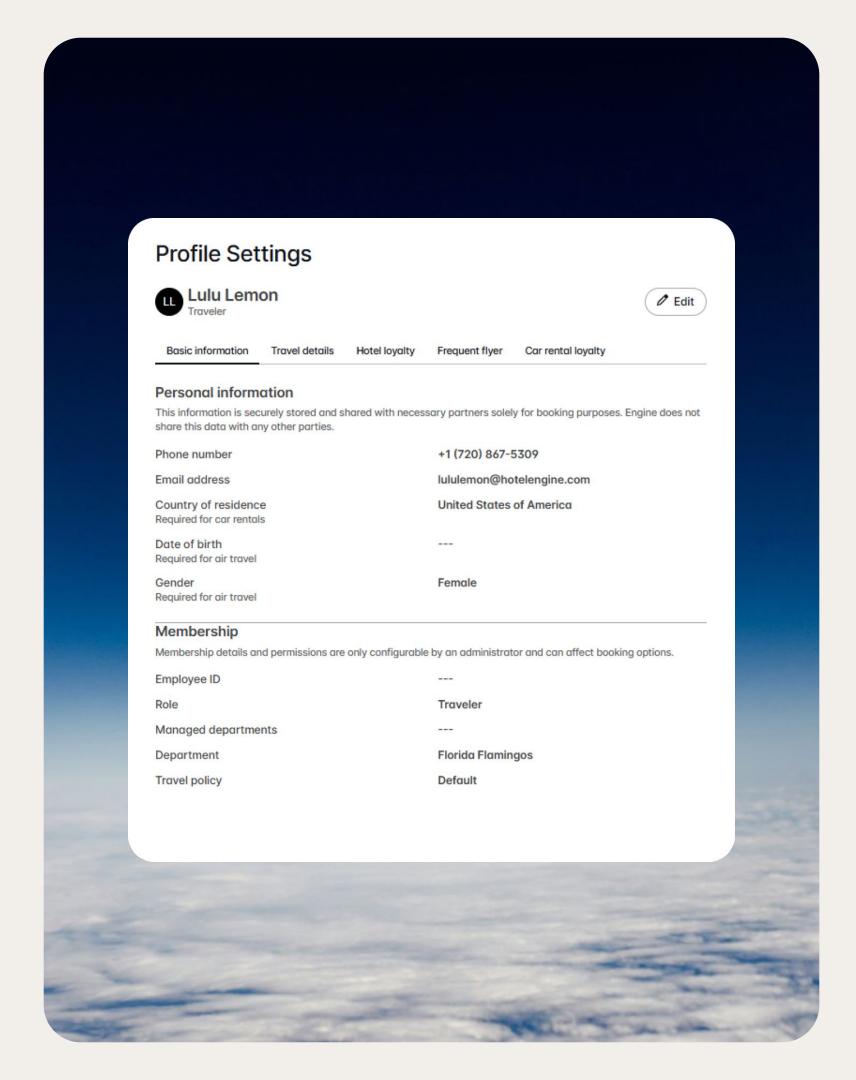
Setup your profile

Open Settings

Click on your initials in the top-right of the screen and then select My Settings from the dropdown.

My Profile

Under the first tab, My Profile, you can update your agency contact information and password. This information is privately stored.

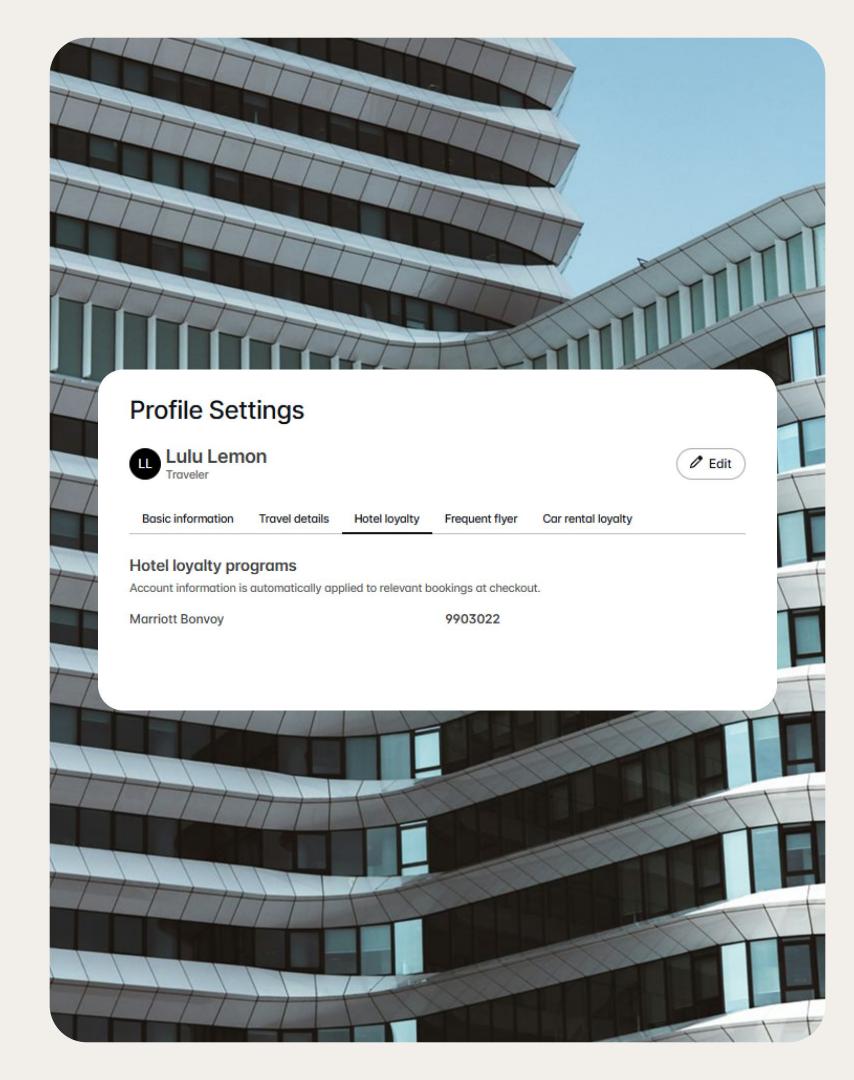


Setup your profile

Add loyalty account

You can connect your accounts from top hotel loyalty programs including Hilton Honors and Marriott Bonvoy to earn points on eligible stays. Click edit under the Hotel Loyalty Programs tab to link your account.

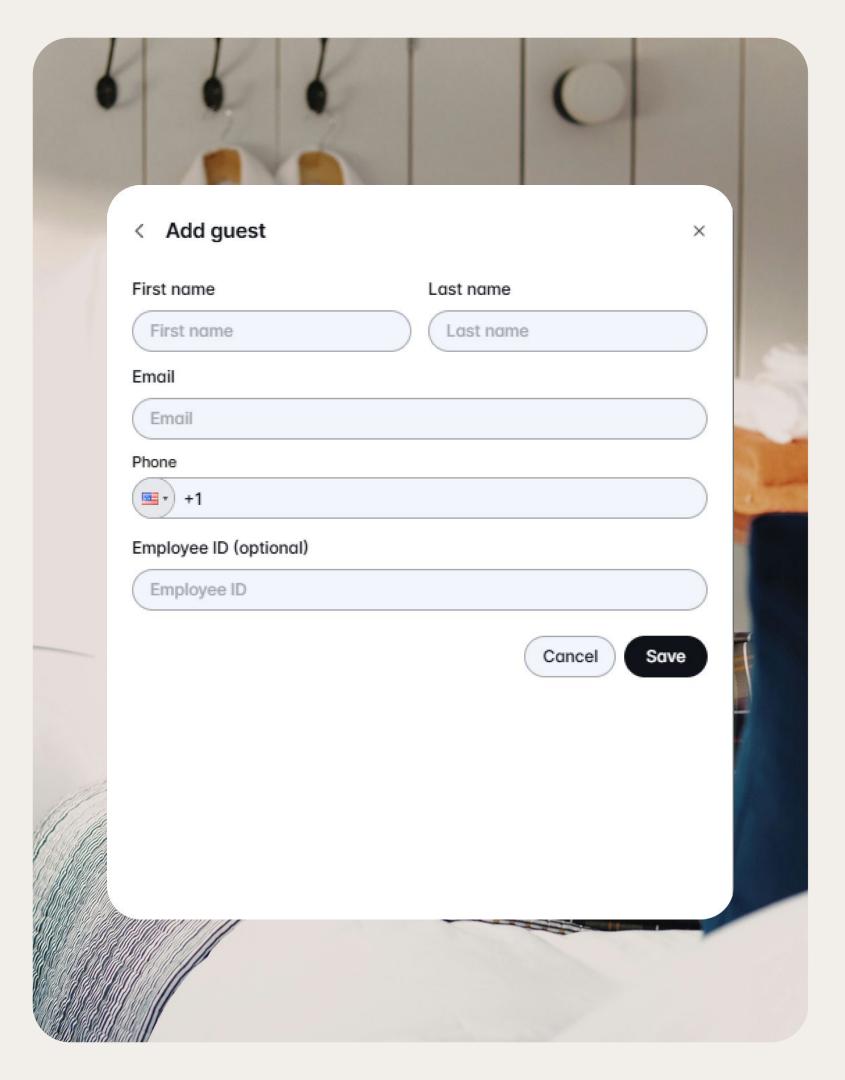
NOTE: Be sure to look for the purple Loyalty Eligible badge when booking rooms to ensure that you are accruing points.



Setup your profile

Guest Information

Add saved guests for expedited booking.
You can edit a guest's email address, first name, last name, phone number and loyalty account number. Guests will be linked to your account only; agency employees should be added as Members for ease of booking (see Members section for more).



Explore your Dashboard

Now that your account is set up, we're going to explore the platform and its functionality.

Follow along by navigating to each tab at the top of your menu:

Book

Trends

• Trips

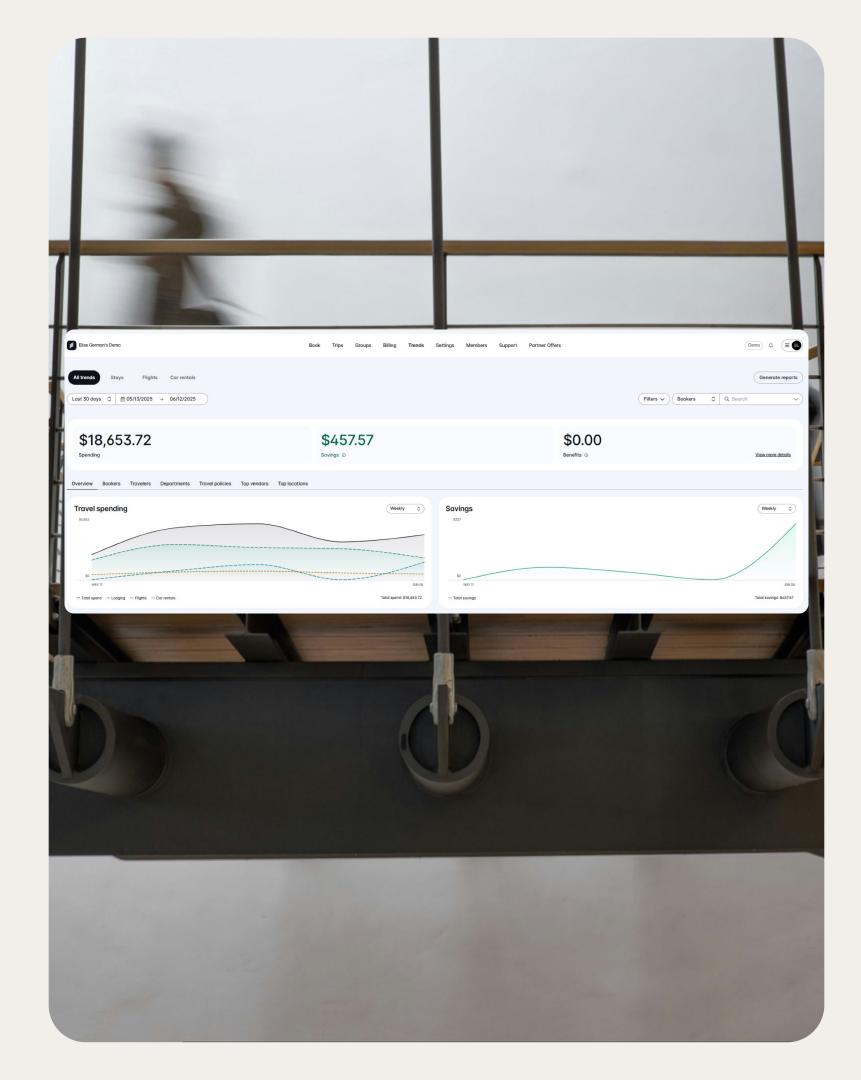
Groups

Billing

Company Settings

Members

Support Center

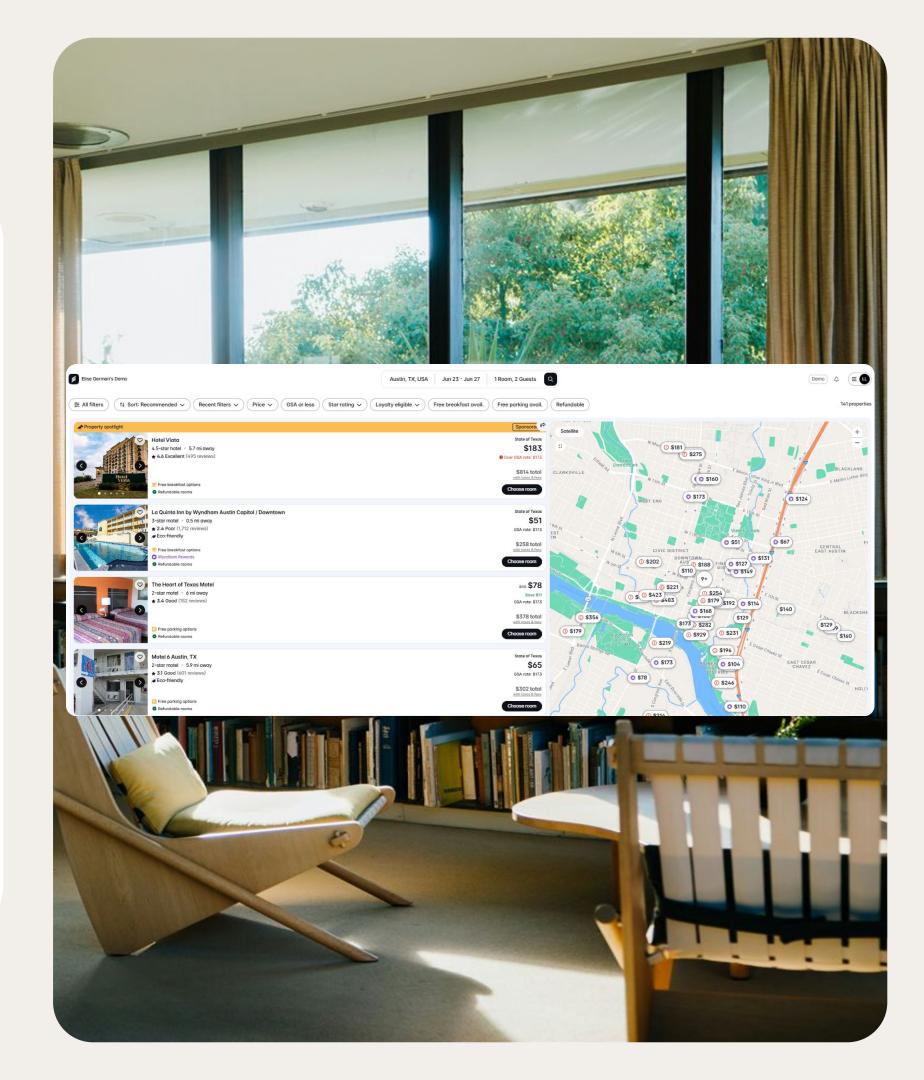


Book

This is where you'll typically start when you access Engine. From here you can:

- Search hotels
- Reserve Rooms
- Customize you search results with property preferences

We'll cover each of these actions in the following slides.

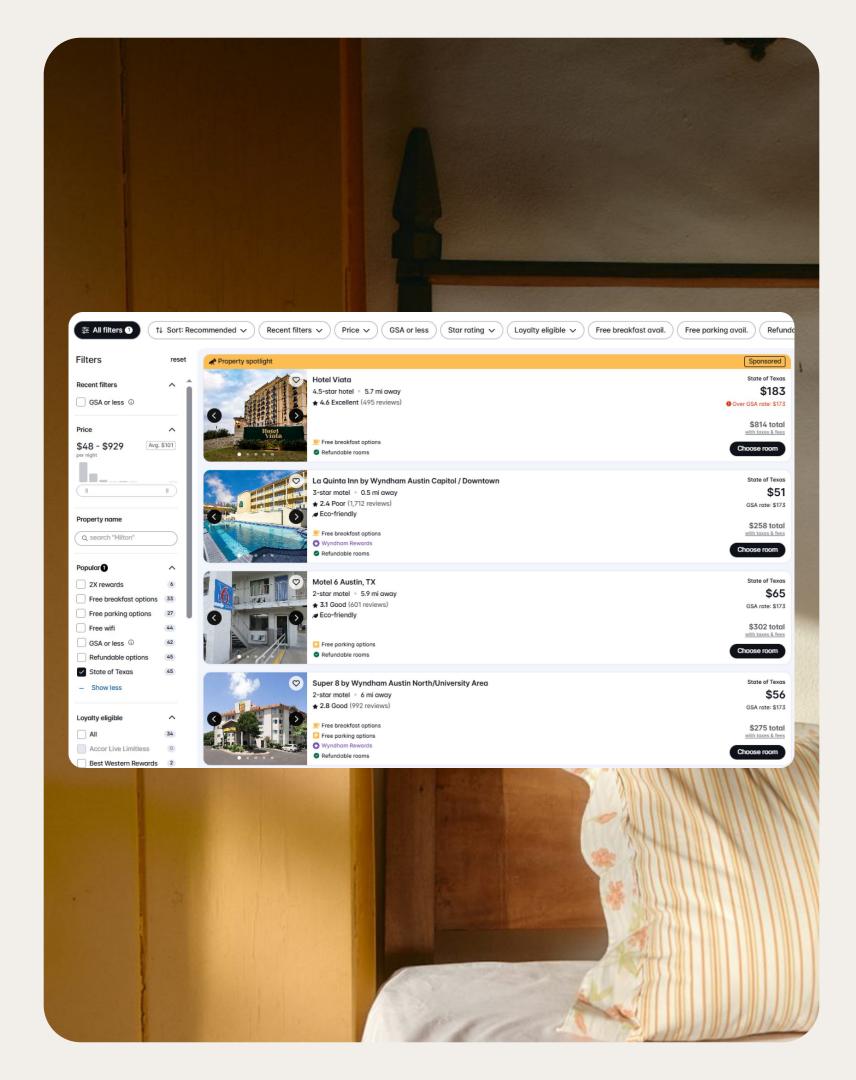


Search Hotels

In the search bar at the top of the homepage, enter the desired city, travel dates and number of guests. Click Search to see the hotels matching your parameters. The nightly rate is subject to change. Usually, it will be consistent with the price shown in search, but the rate is not guaranteed until your booking is finalized.

Filter & Sort Results

Modify your results by price, distance, amenities, and more. You can also filter by hotels that are at or below the GSA nightly rate. Use the State of Texas filter to see only properties with locally negotiated rates.

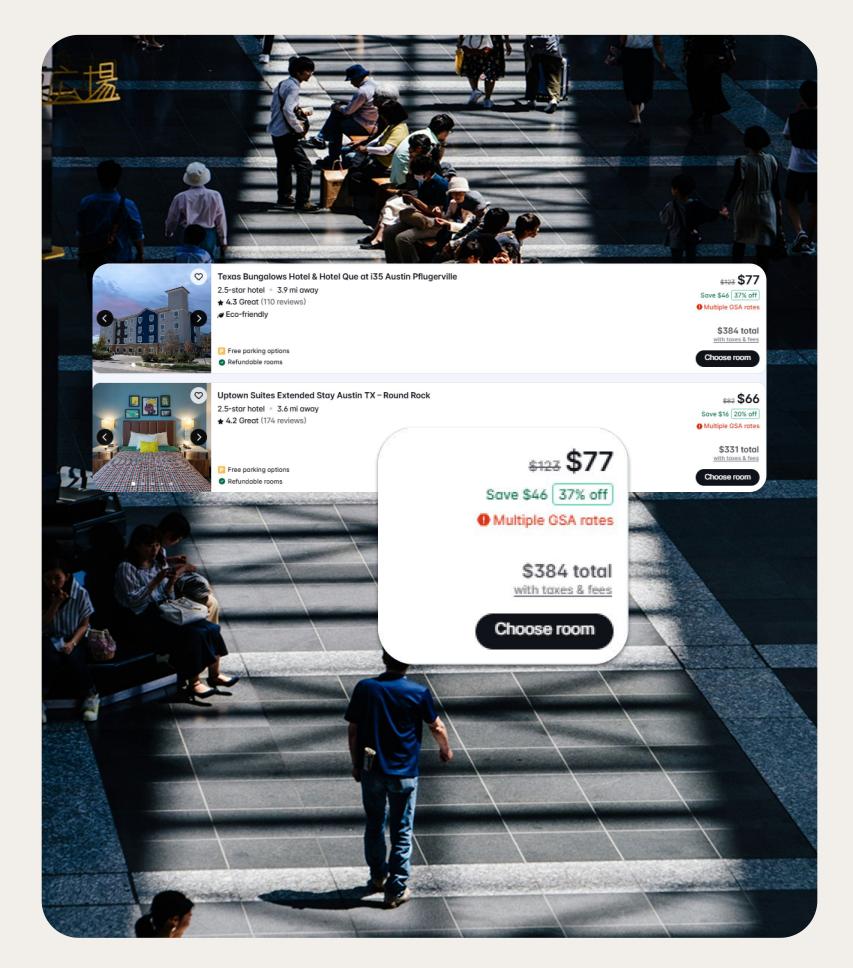


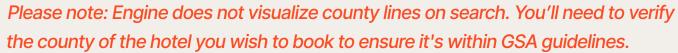
Multiple GSA rates

Sometimes, you will see "Multiple GSA Rates" on a hotel listing. This indicates that the zip code in which the hotel is located covers multiple counties. The GSA sets per diem rates for lodging at the county level. It is the traveler's responsibility to know the GSA maximum per diem rate of their duty point.

GSA or lower

To only see properties that can be booked at GSA rates or lower, use this search filter under **Popular** Filters.



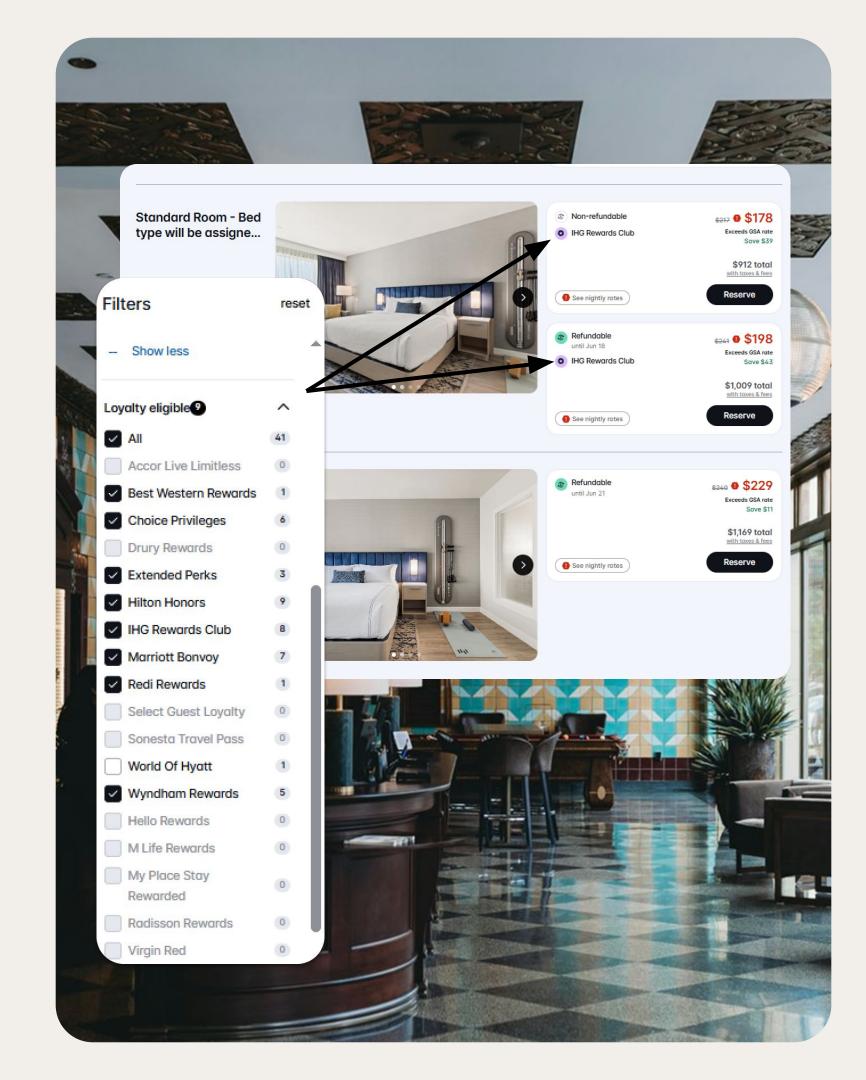


Loyalty

To earn brand-specific loyalty points on a booking, the traveler's loyalty information must be saved in their profile. Use the Loyalty Eligible search filter to only see results that are eligible for these points (and filter by specific programs).

When booking, be sure to select a room type that also lists the loyalty program in purple. Not all rooms are loyalty eligible.

Note that the primary guest name on the reservation must match the name on the loyalty account for points to be earned.



Compare Against GSA Rate

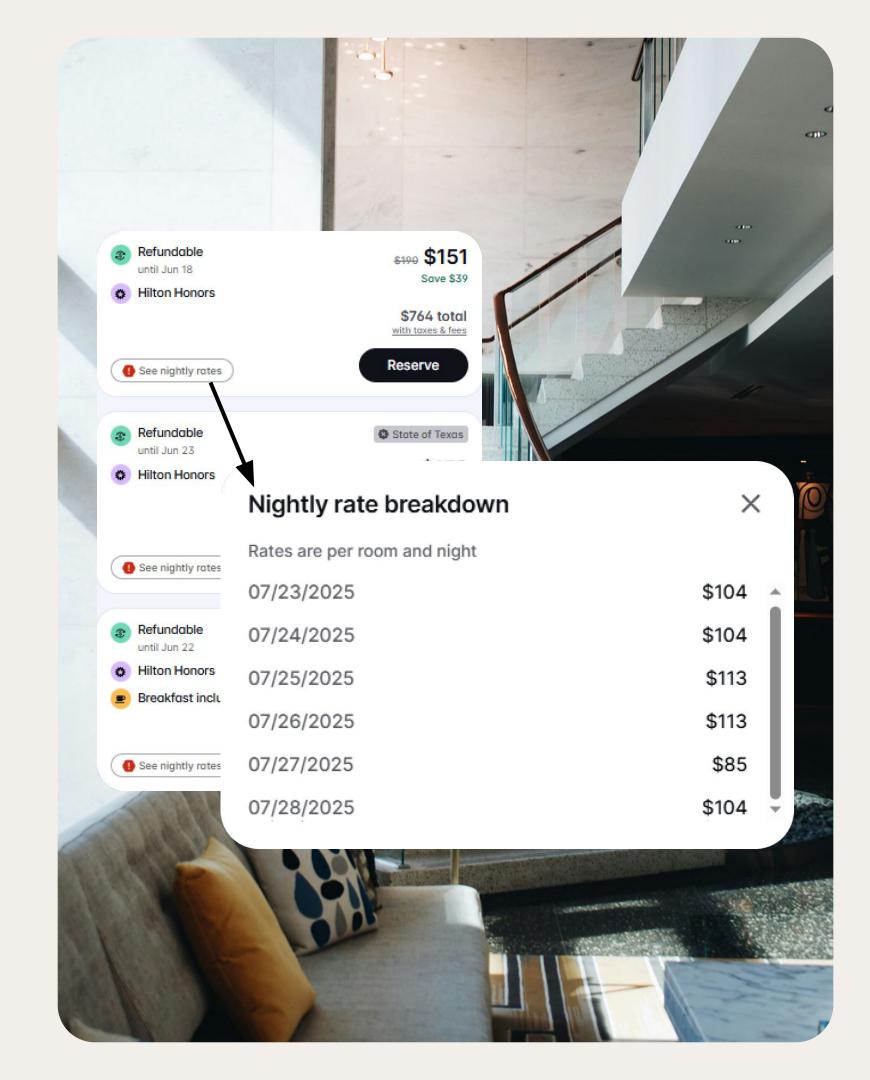
GSA maximum per diem rates will automatically have a banner around them to make them easier to find.

GSA Rate

For most State of Texas agencies, you must book a hotel with a nightly rate that is at or below the listed GSA.

See Nightly Rates

State travelers must click "See Nightly Rates" to confirm each night during their stay meets GSA rate requirements.



Book: reserve

Reserve

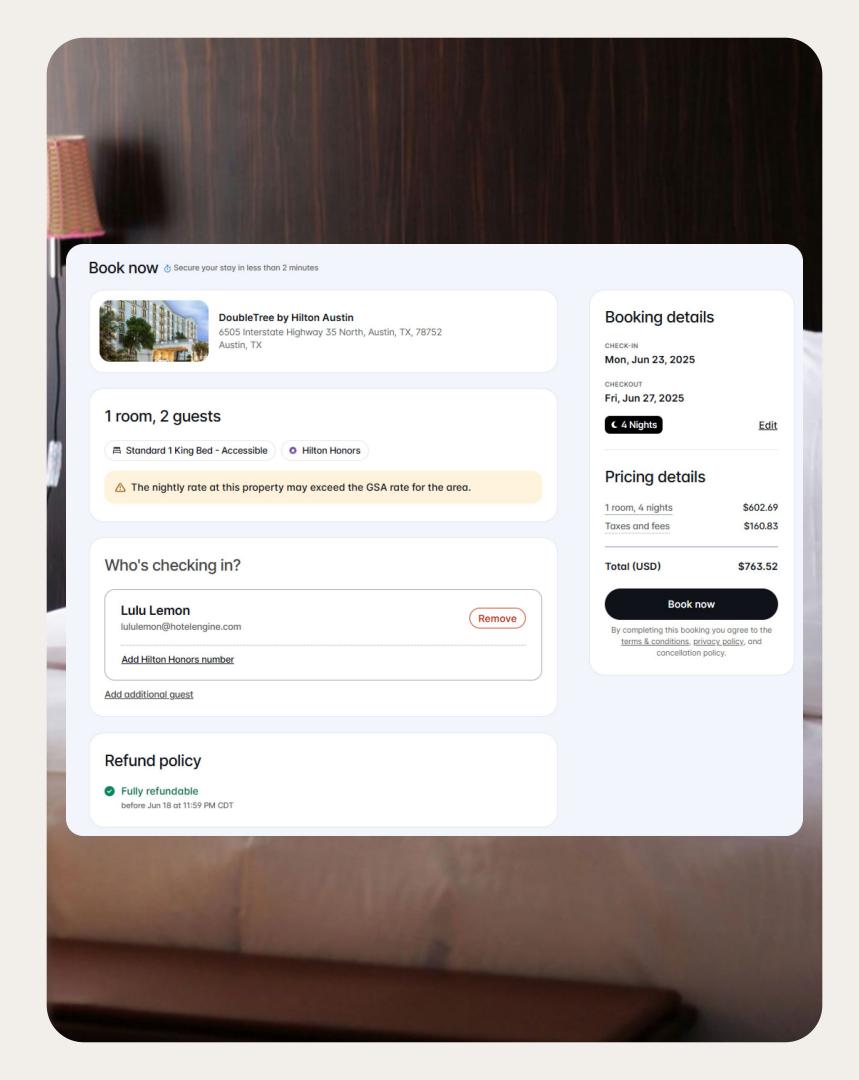
When you find a room you like, select the Reserve button.

Primary guest info

Select yourself, a member on your agency's account, an existing guest linked to your individual account, or enter information for a new guest by clicking Add New Guest.

The primary guest is the name that will appear on the folio.

TIP: If you are adding a guest who is an employee of the agency and wil be traveling again in the future, it's best practice to create an account for them. See the Members section to learn how.



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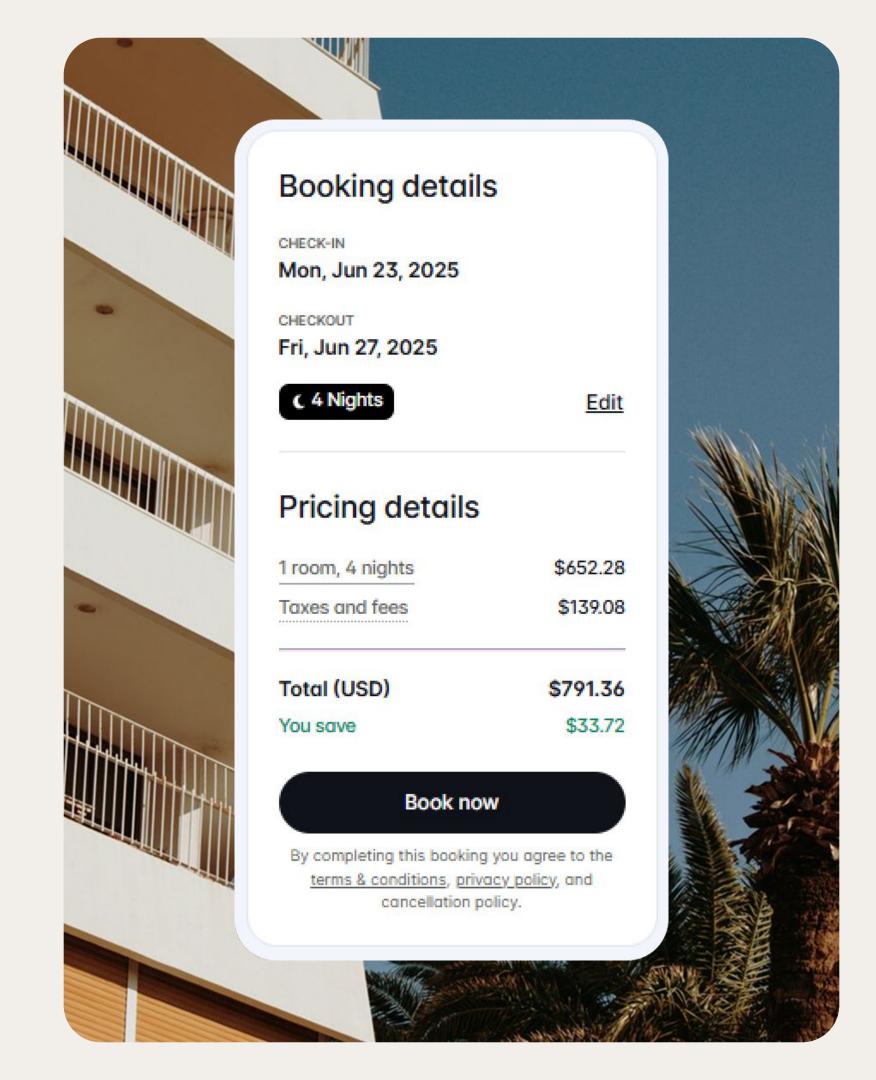
Book: reserve

Payment

Unless you choose Change Payment, the reservation will automatically be charged to your Direct Bill account.

Tax-exempt

Taxes & fees will always appear on this summary. Taxes are waived for exempt guests by the hotel at check-in. This amount will be removed once the primary guest submits a tax-exemption certification. If the reservation was booked via Direct Bill, the new total will be reflected in your statement.



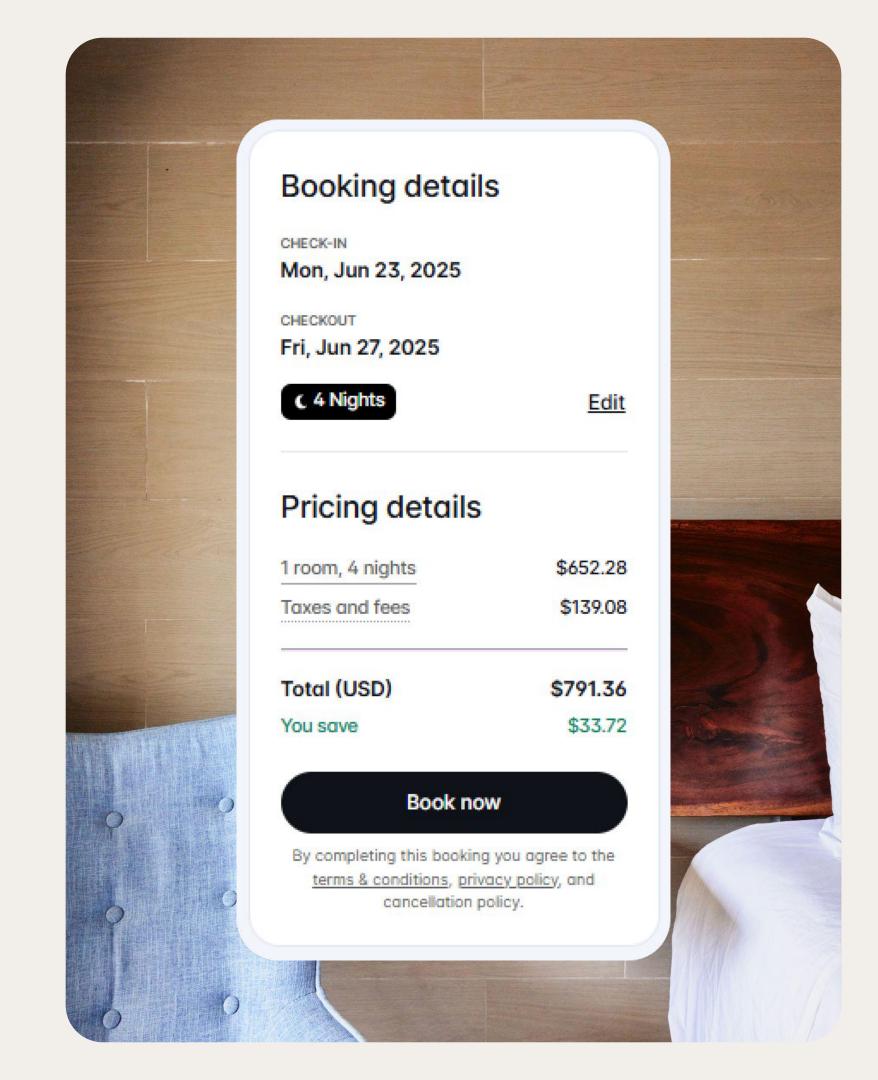
Book: reserve

Taxes and Fees

Taxes & fees will always appear on this summary. Taxes are waived for exempt guests by the hotel at check-in. This amount will be removed by the property once the primary guest submits a tax-exemption certification. If the reservation was booked via Direct Bill, the TC will need to request an invoice adjustment from our Support team.

Summary

Review the individual nightly rate breakout, number of rooms, number of guests, room type and all fees associated with the booking. Click Complete Booking.



Tax Exempt Information

State government officials and employees (exempt from state and local hotel tax)

This exemption category includes only Texas state officials or employees who present a Hotel Tax Exemption Photo Identification Card. State employees without a Hotel Tax Exemption Photo Identification Card and Texas state agencies are not exempt. (The state employee must pay hotel tax, but their state agency can apply for a refund.)

Tax Exemption Form

Please contact your travel coordinator and/or the STMP if you have questions about your tax-exemptions status. It is the responsibility of the traveler to present their tax exemption certificate at check-in, and handle waiving taxes directly with the hotel.

State Travel Coordinator List







Book: customize

Favorite Hotels

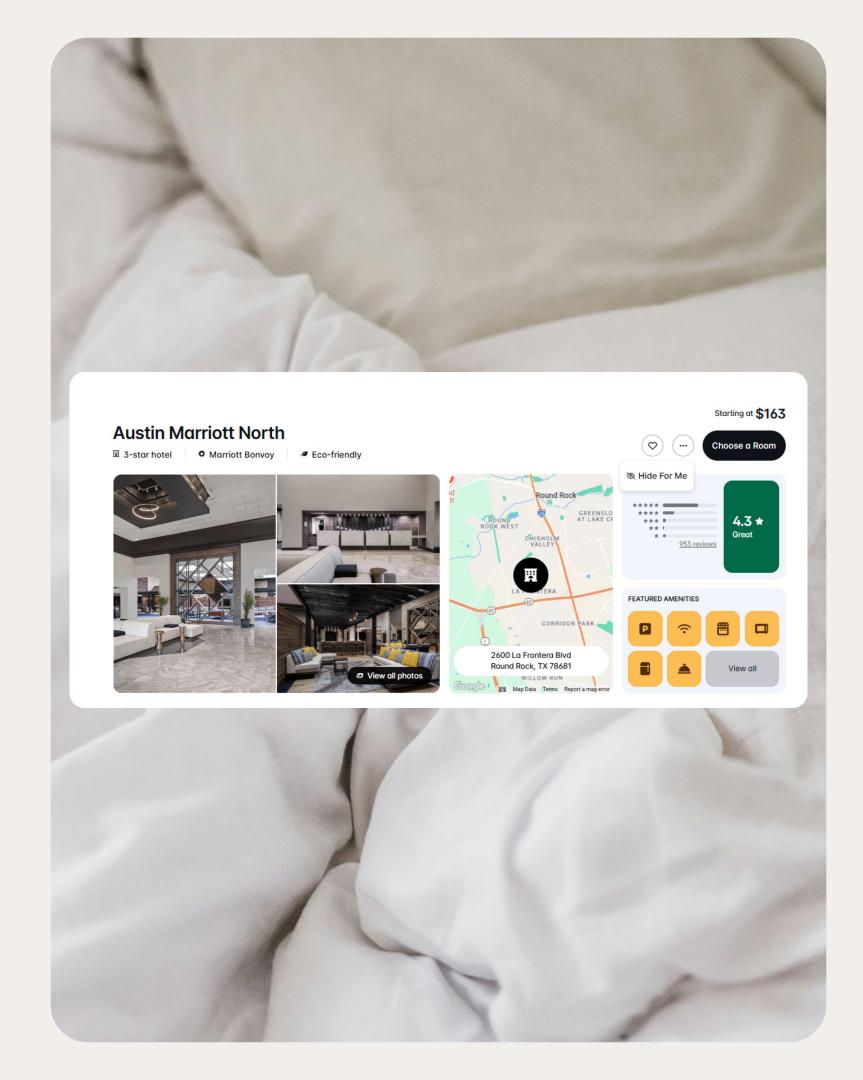
Favoriting hotels gives you the ability to quickly find and rebook properties you like. Click the heart icon to add a hotel to your favorites.

Preferred properties

Preferred properties are pinned to the top of all relevant search results and highlighted on the map. To set a property as **Preferred**, access the hotel detail page, click the More button and select **Set as Preferred**.

Hide hotels

If there's a hotel you'd rather not book again, you can Hide it for yourself. Access the hotel detail page, click the More button and select **Hide for Me**.



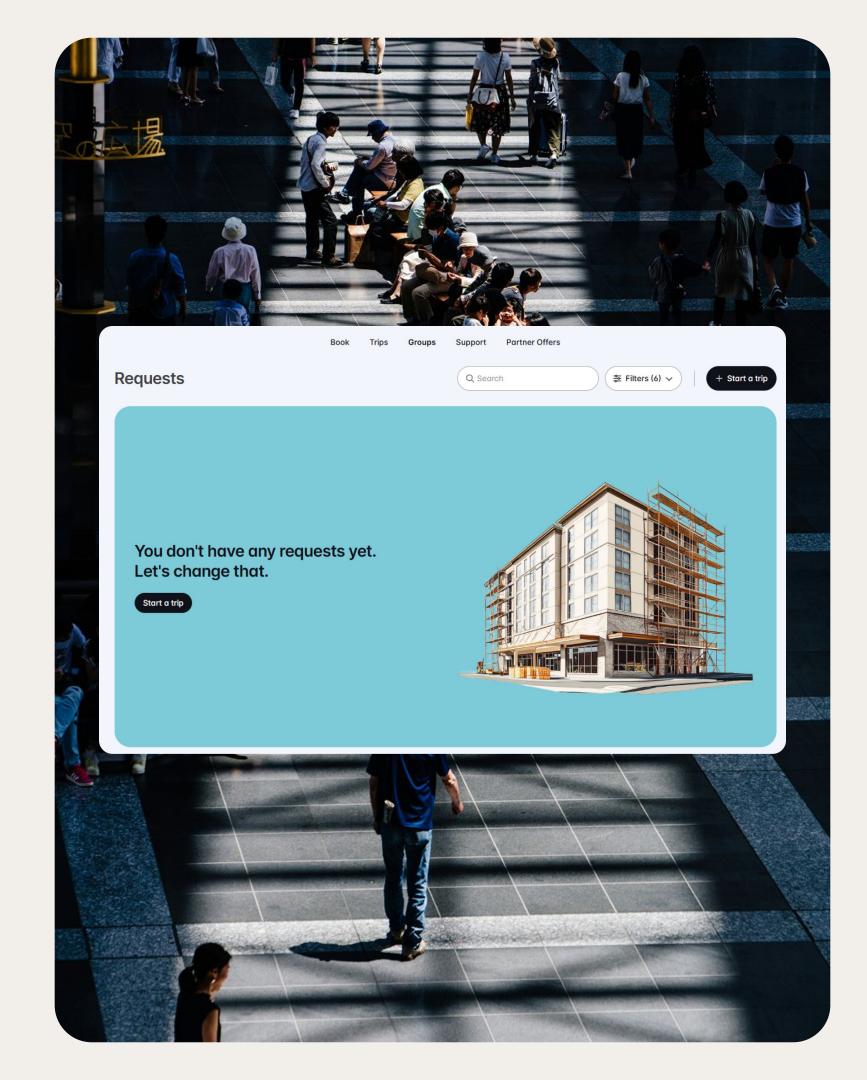
Book: other options

My Properties

Select My Properties below the search bar to view all your agency's saved properties: **Preferred, Favorites** and Hidden. You can also see property reviews on this page.

Groups

If you need to book more than eight rooms or an extended stay of over 28 days, you'll need to use Engine's Groups service. Click this button to begin your request (more on this when we get to the Groups tab).

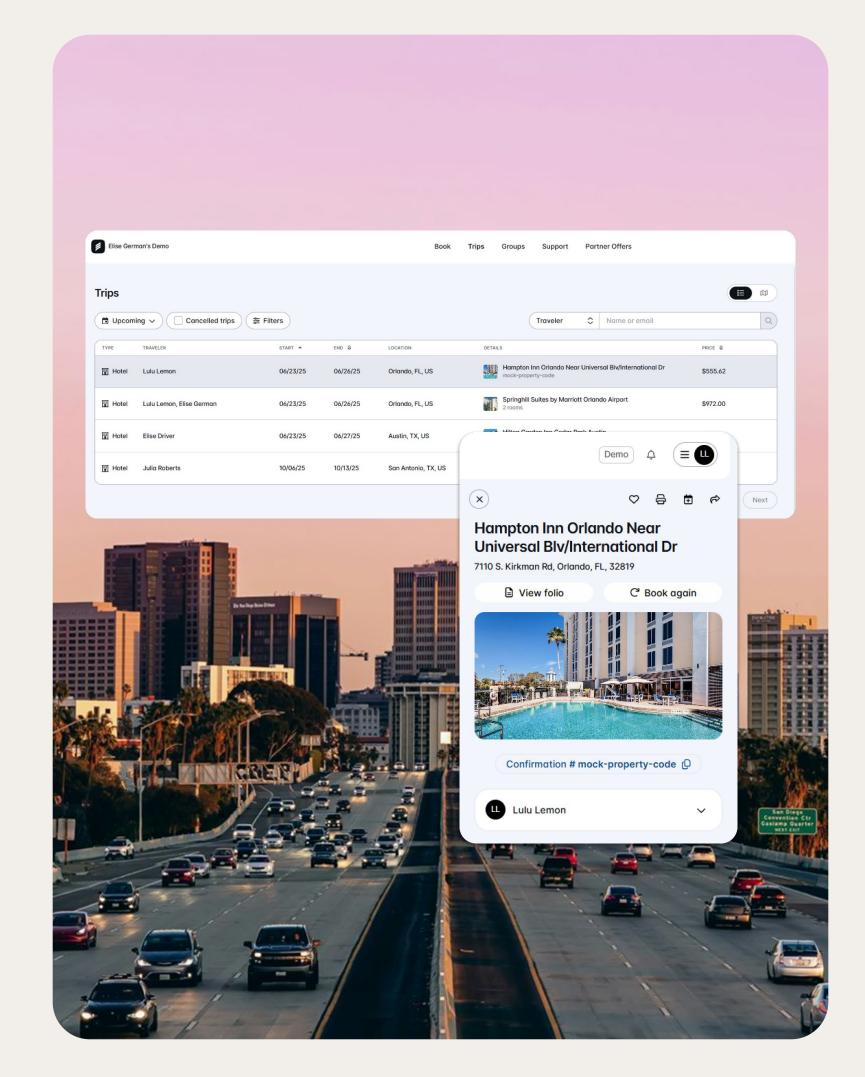


Trips

The Trips tab of your dashboard is where you'll go to view and manage your team's travel. Under Trips, you can:

- View all past, pending and future bookings
- Modify reservation details
- Cancel, shorten or extend bookings

We'll cover each of these actions in the following slides



Trips: view

View trips

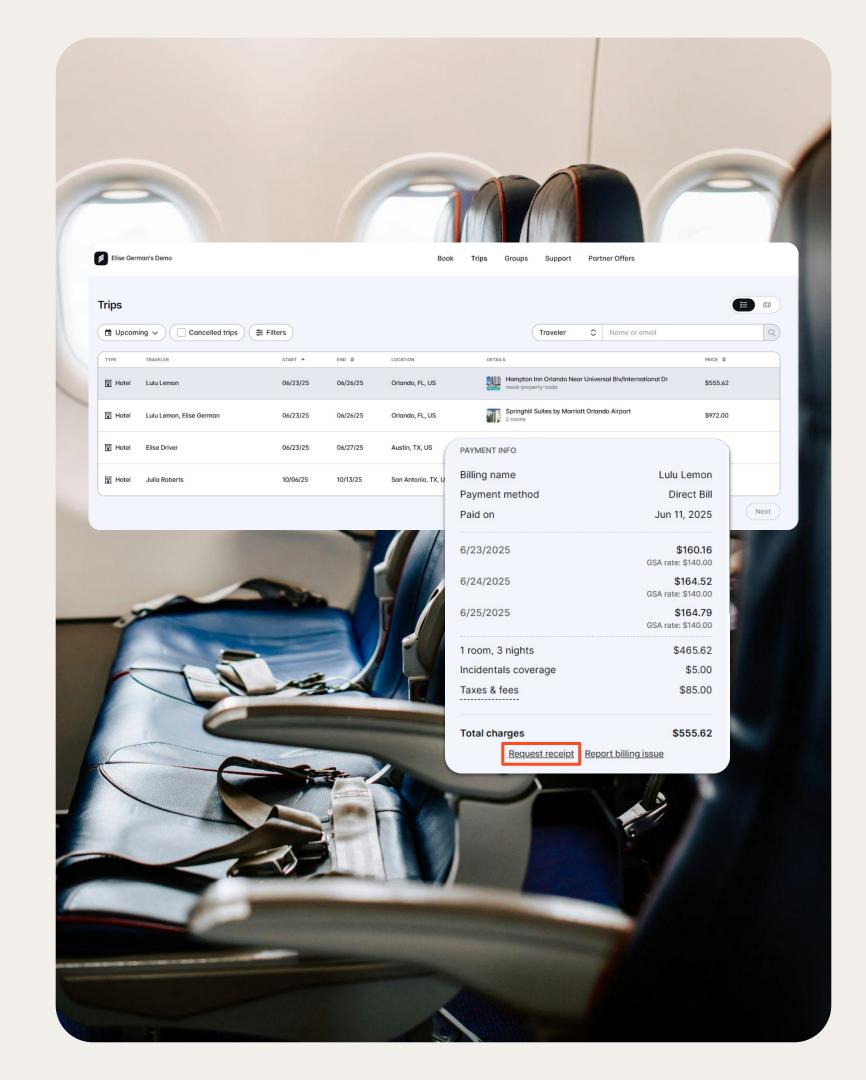
Under the Trips tab, you can view all active, upcoming, past and cancelled trips. Use the buttons at the top of the page to filter your results.

Manage trip

Click on a trip you are interested in. In this menu, you can view, share, or print the trip itinerary. You can also make modifications to the reservation (see next slide).

Request hotel folio

After selecting a trip in the step above, click **Request Receipt** to open a case with our Support Team, who will retrieve one from the hotel on your behalf.



Modify: extending trips

Need a little more time on location? No worries — you don't even have to pick up the phone.

Step 1

Navigate to the **Trips Tab** and click on the trip you want to adjust.

Step 2

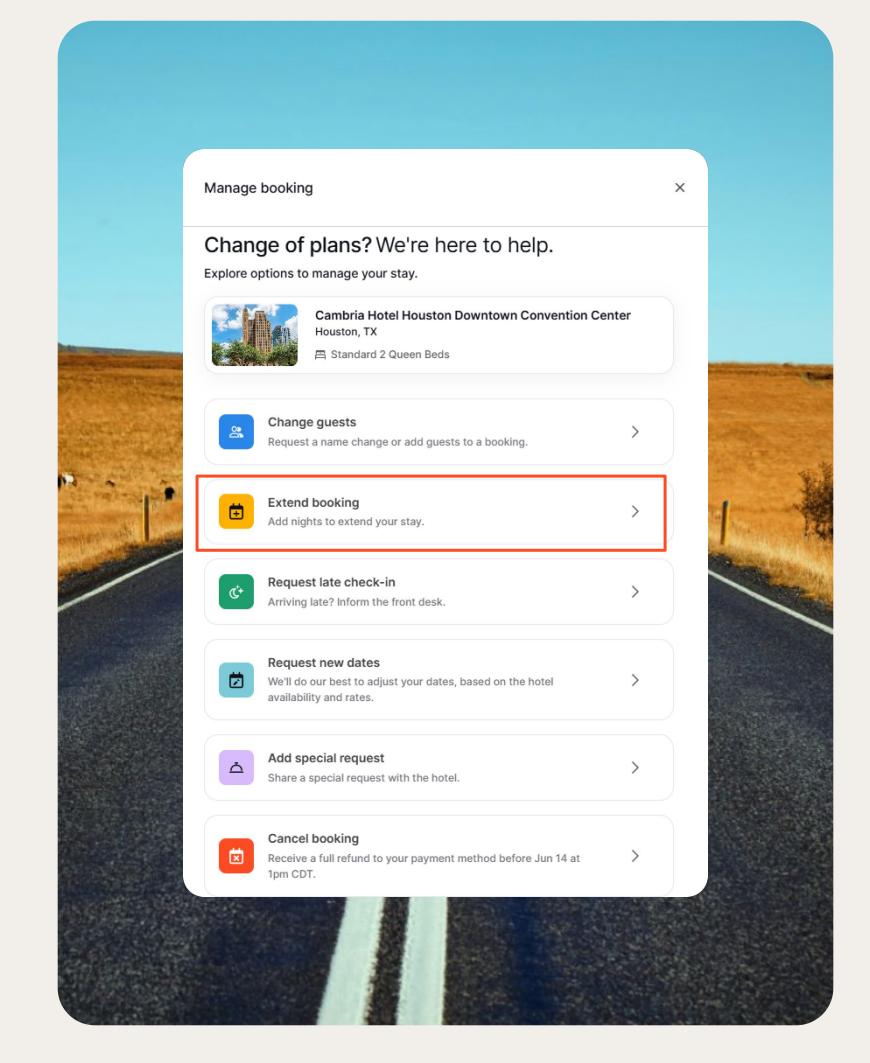
From the trip window on the right side of your screen, select **Extend Booking**.

Step 3

Fill in your new desired checkout date.

Step 4

If possible, we'll extend your stay in the same room, but if not, you'll be informed of your other options. We'll get your new nights confirmed and your itinerary will update automatically.



Modify: shortening trips

Planning to head home early? If you booked a refundable room, you can adjust your checkout date while you are within the 'refundability window' (or any point prior to the deadline set by the property for changes and cancellations to be made).

Step 1

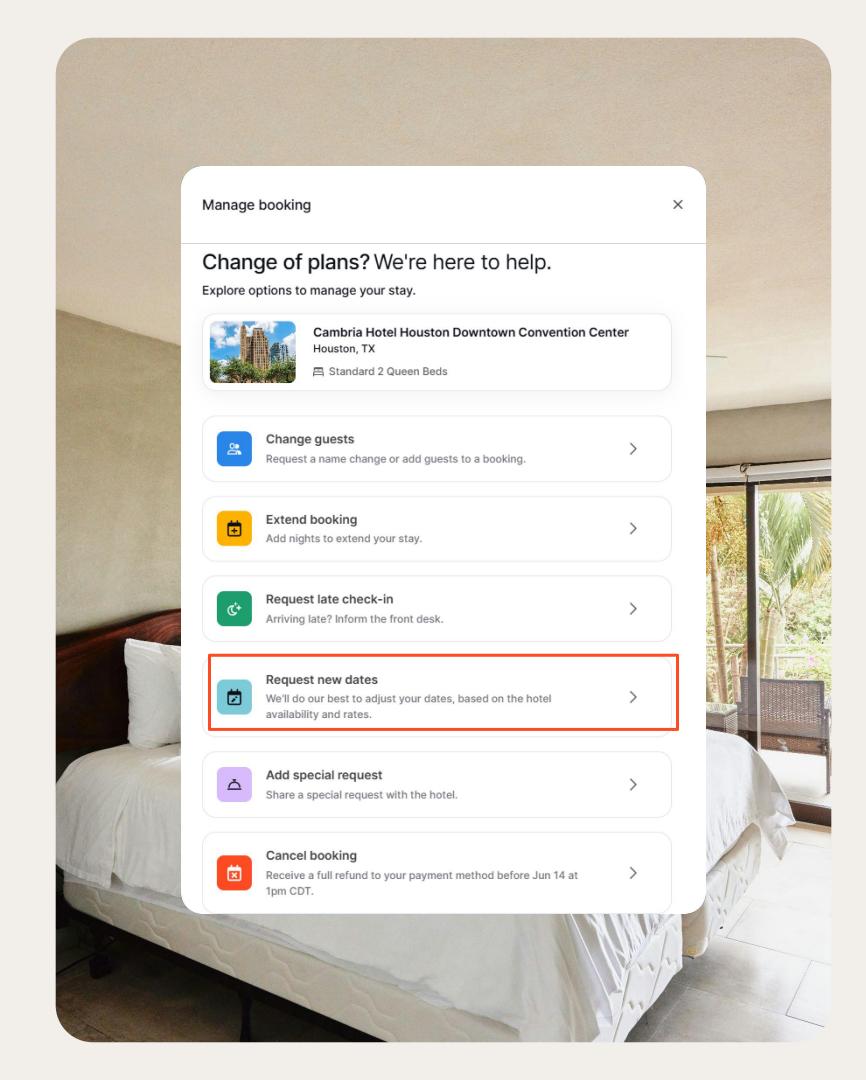
Navigate to the Trips Tab and click on the trip you want to adjust.

Step 2

From the trip window on the right side of your screen, click Modify Trip. Locate the Refund Policy box and confirm that you are still within the refundability window. *On mobile, you'll need to scroll to the bottom.*

Step 3

Click "Request new dates," then "shorten trip," and select your new checkout date. Your itinerary will automatically adjust, and you'll receive a refund to your original form of payment.



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Modify: canceling your trip

Need to call off your travel completely? If you booked a refundable room, you can cancel within the refundability window and get your money back.

Step 1

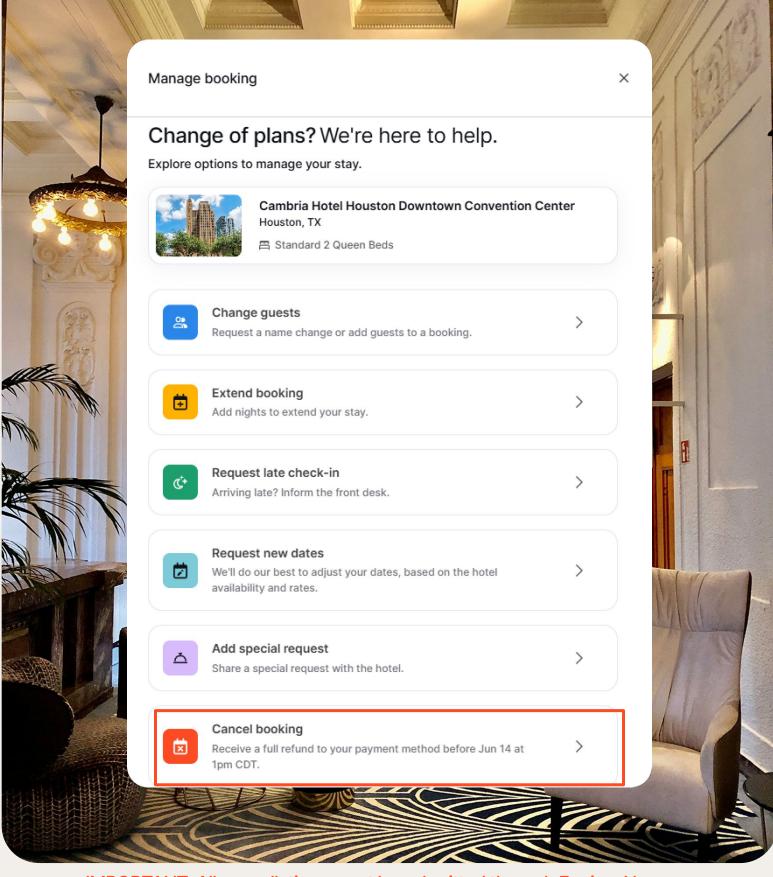
Navigate to the Trips tab and click on the trip you want to cancel.*

Step 2

From the trip window on the right side of your screen, click Cancel Booking. *On mobile, you'll need to scroll to the bottom.*

Step 3

Click Cancel Trip. We'll cancel the room for you, and you'll receive a refund to your original form of payment.



IMPORTANT: All cancellations must be submitted through Engine. Never contact the hotel directly to cancel a booking. If cancelling a reservation within 24 hours of check-in or if the option to cancel does not appear because of the hotel's cancellation policy, call Engine's Member Support.

Modify: request other modifications

Need to make a request (like adding a rollaway bed or another accommodation)?

Step 1

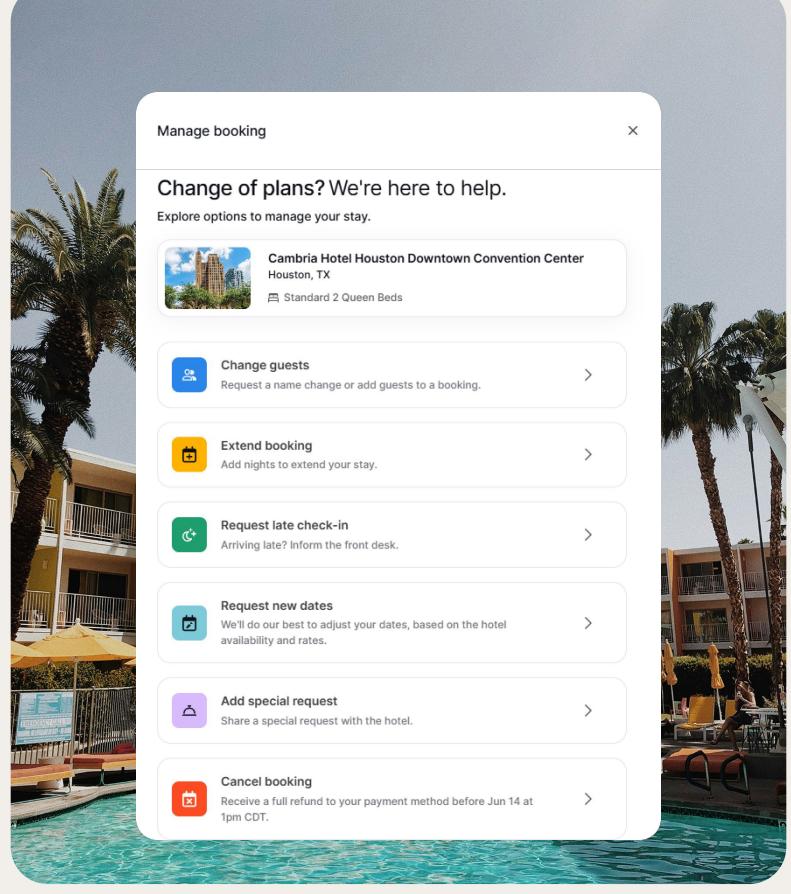
Navigate to the **Trips tab** and click on the trip you want to adjust.

Step 2

From the trip window on the right side of your screen, click Modify trip and select Modify Reservation if prompted. *On mobile, you'll need to scroll to the bottom.*

Step 3

This will allow you to submit a request to our Member Support team, and they will follow up with the status within 24 hours. Note that requests are up to the hotel's discretion and are not guaranteed.



IMPORTANT: All cancellations must be submitted through Engine. Never contact the hotel directly to cancel a booking. If cancelling a reservation within 24 hours of check-in or if the option to cancel does not appear because of the hotel's cancellation policy, call Engine's Member Support.

Modify: Changing guest names

Need to change names?

Step 1

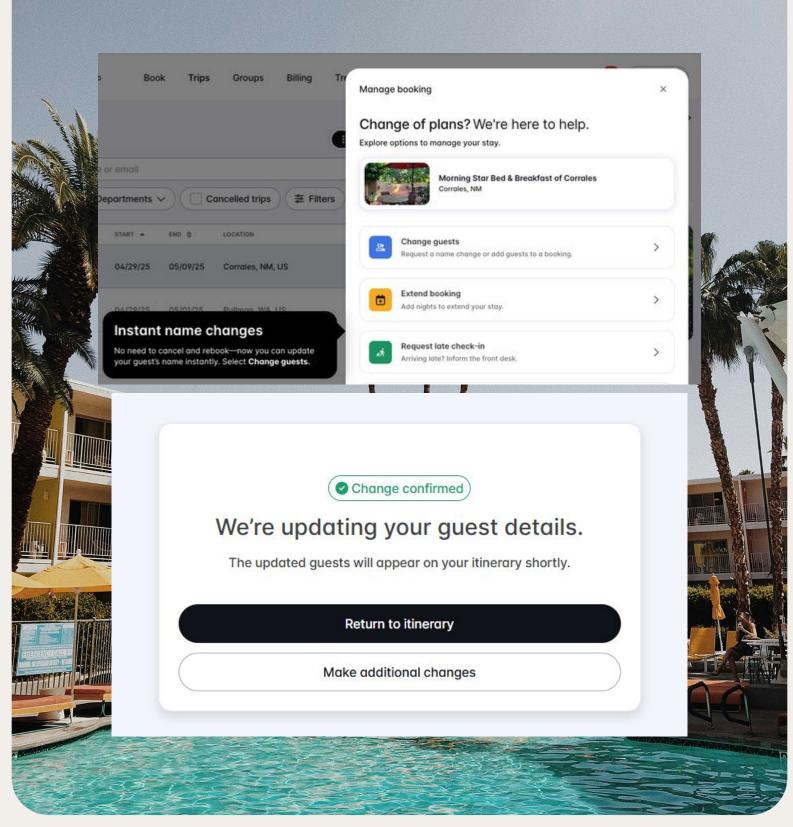
Navigate to the Trips tab and click on the trip you want to adjust.

Step 2

From the trip window on the right side of your screen, click Modify trip and select Modify Reservation if prompted. *On mobile, you'll need to scroll to the bottom*.

Step 3

Users will see an instant "Success!" message instead of waiting for confirmation. Our Member Support team will ensure the changes are reflected directly with the property.

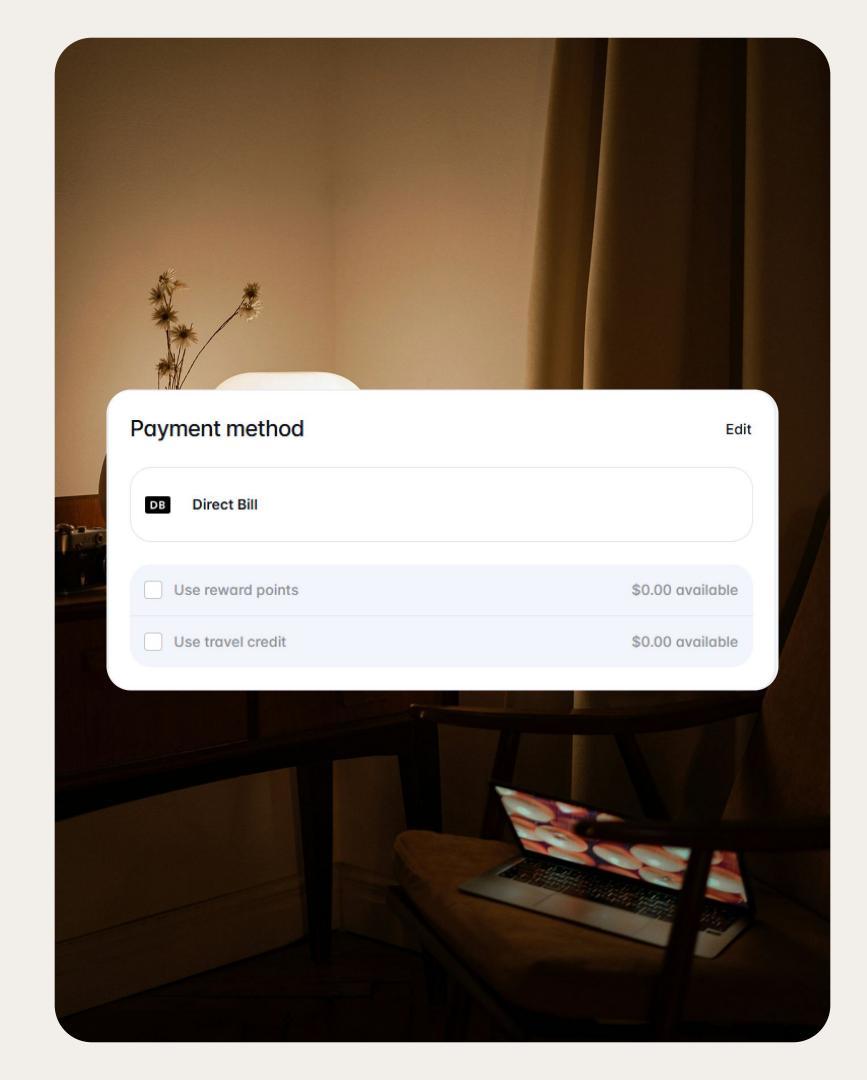


IMPORTANT: All cancellations must be submitted through Engine. Never contact the hotel directly to cancel a booking. If cancelling a reservation within 24 hours of check-in or if the option to cancel does not appear because of the hotel's cancellation policy, call Engine's Member Support.

Billing: Direct Bill

You are eligible for Direct Bill! This monthly invoicing program establishes a direct line of credit between our users and Engine — not individual hotels. With this option, you can track hotel spend and reduce risk by eliminating the need for multiple transactions and forms of payment.

If you are not already set up, ask your Engine representative for a credit application today.

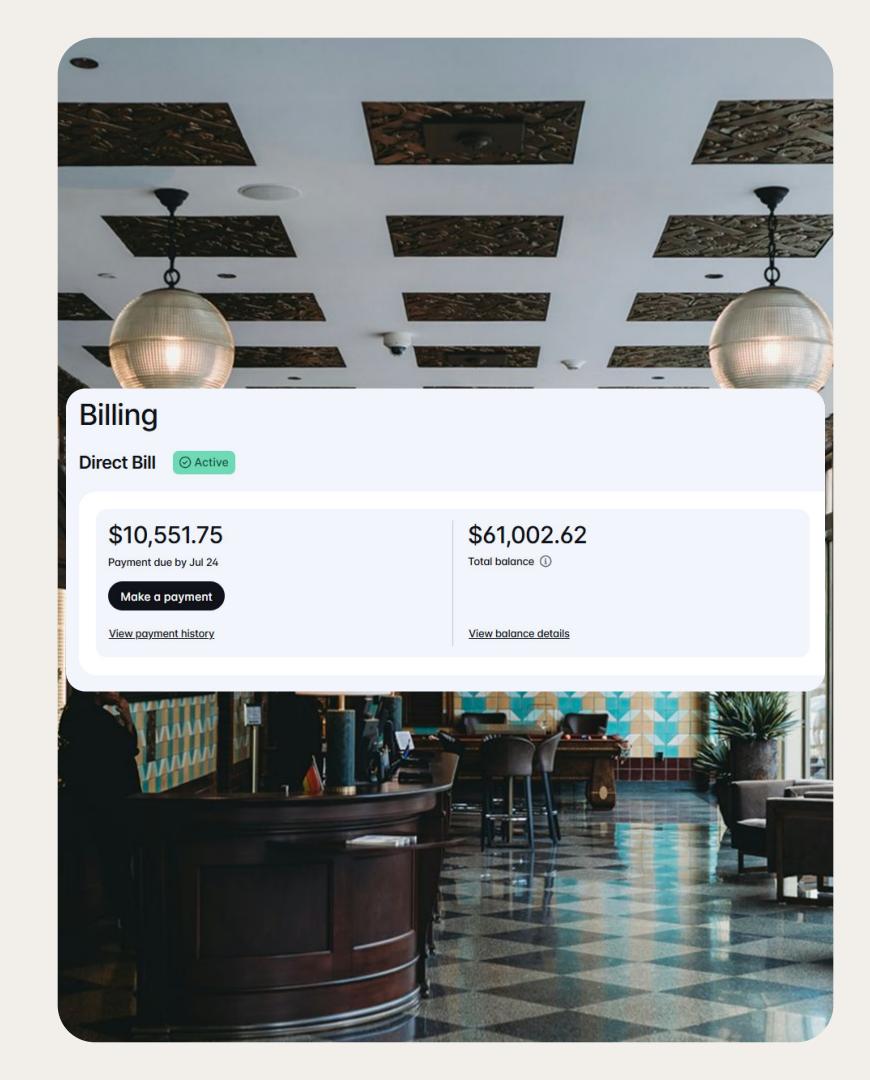


Billing

When Direct Bill is set up, you can manage invoices and payments on the Billing tab. From this tab, you can:

- View paid, due and pending invoices
- Download statements
- Make payments

We'll cover each of these actions in the following slides.



Billing

View invoices

View statements for all charges on your account (paid, due and pending). Use the column headers to sort by status, statement period, invoice date and other data points to easily locate information. You can also filter by:

- Traveler or guest name
- Price

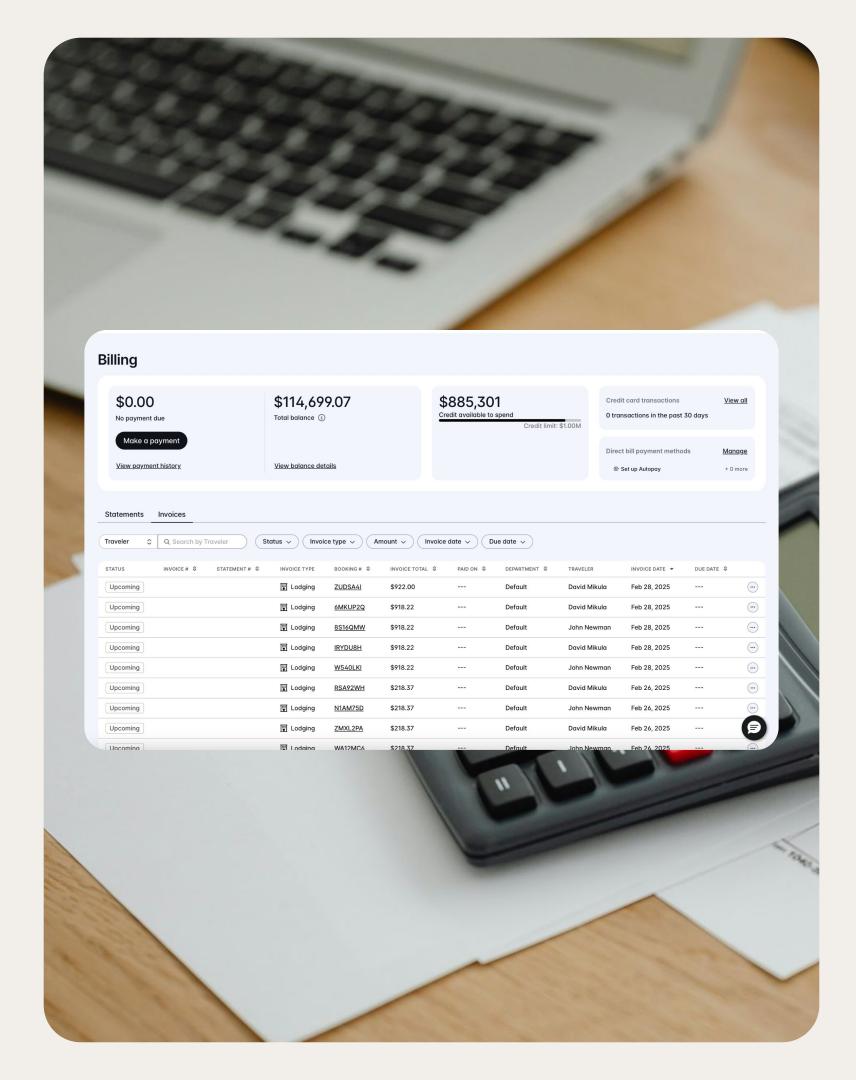
Hotel

Custom Fields

Date

Download Statements

Click the three dots all the way to the right side on a specific invoice, then choose View Statement, Export Statement (as CSV or PDF) or Download All Invoices.

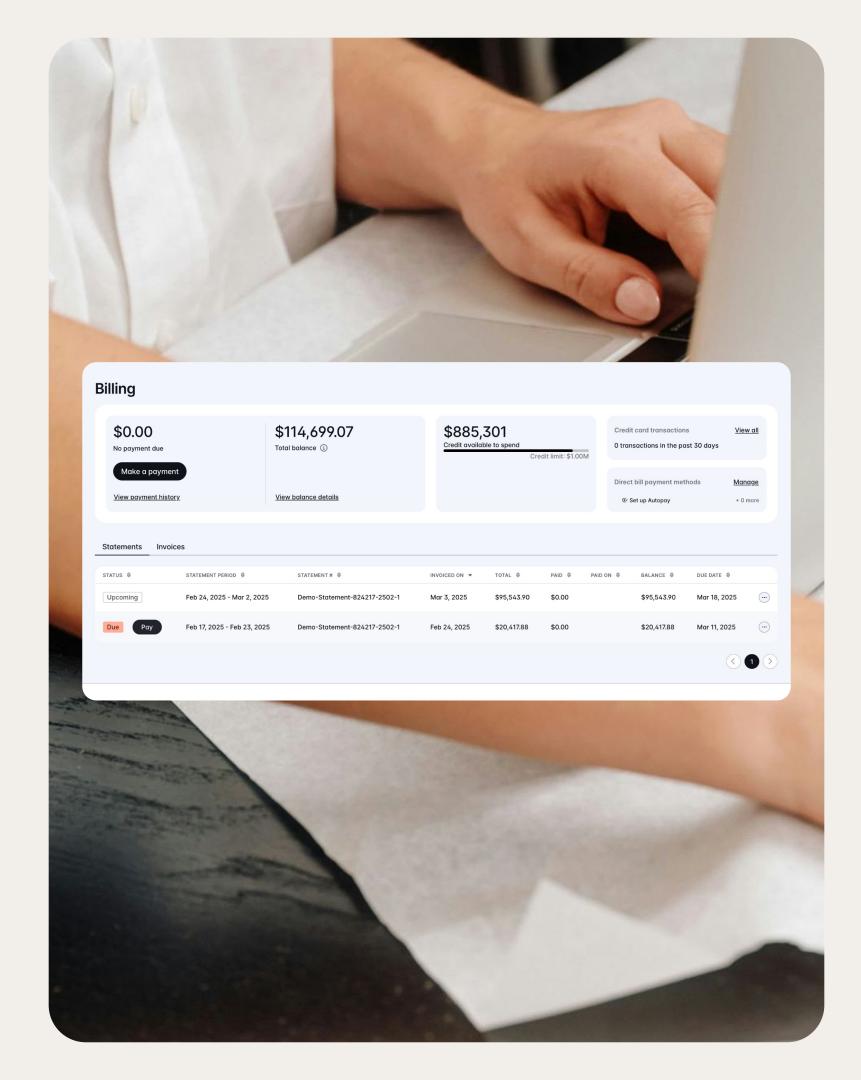


Billing

Pay balances

To make a payment, simply click the three dots to the right side of an invoice line that is labeled Due.

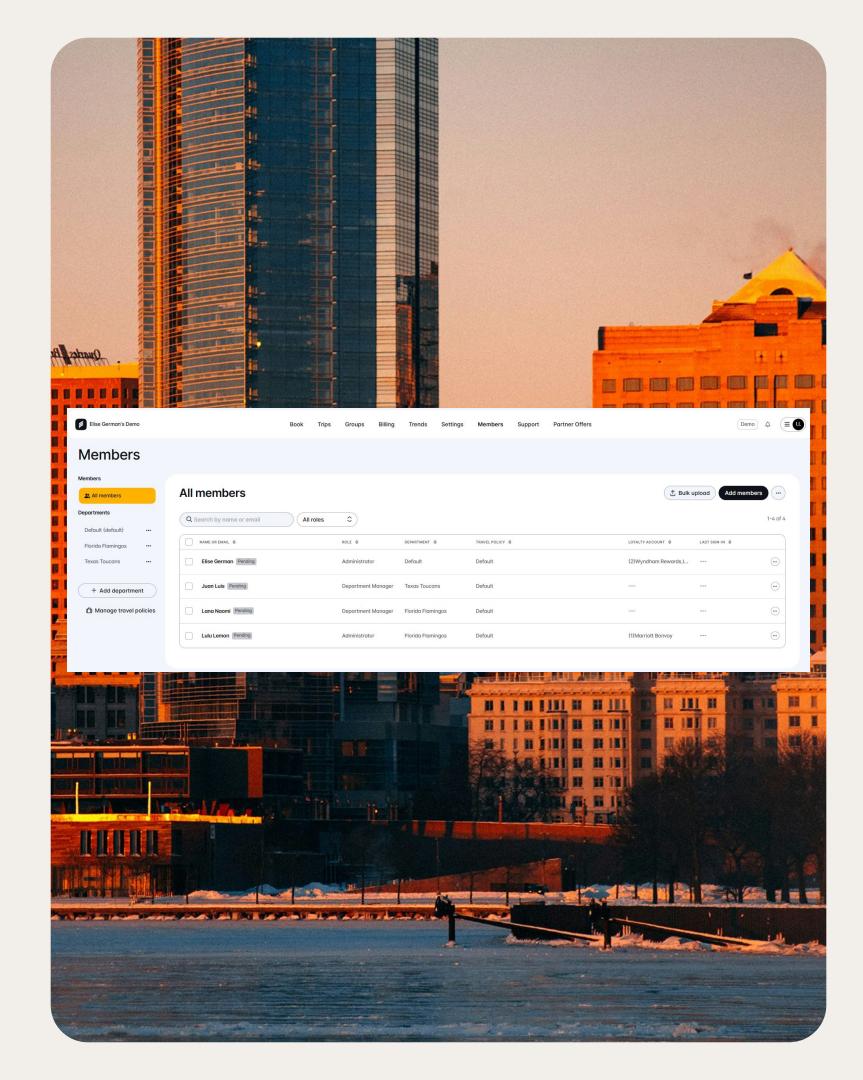
Agencies can pay via the comptroller's site, and individuals can pay via check or ACH.



Manage your team and all the users on your account. From this tab, you can:

- View, edit and invite members
- Manage permissions and account information
- Create and manage departments and roles
- Manage travel policies

We'll cover each of these actions in the following slides.



View members

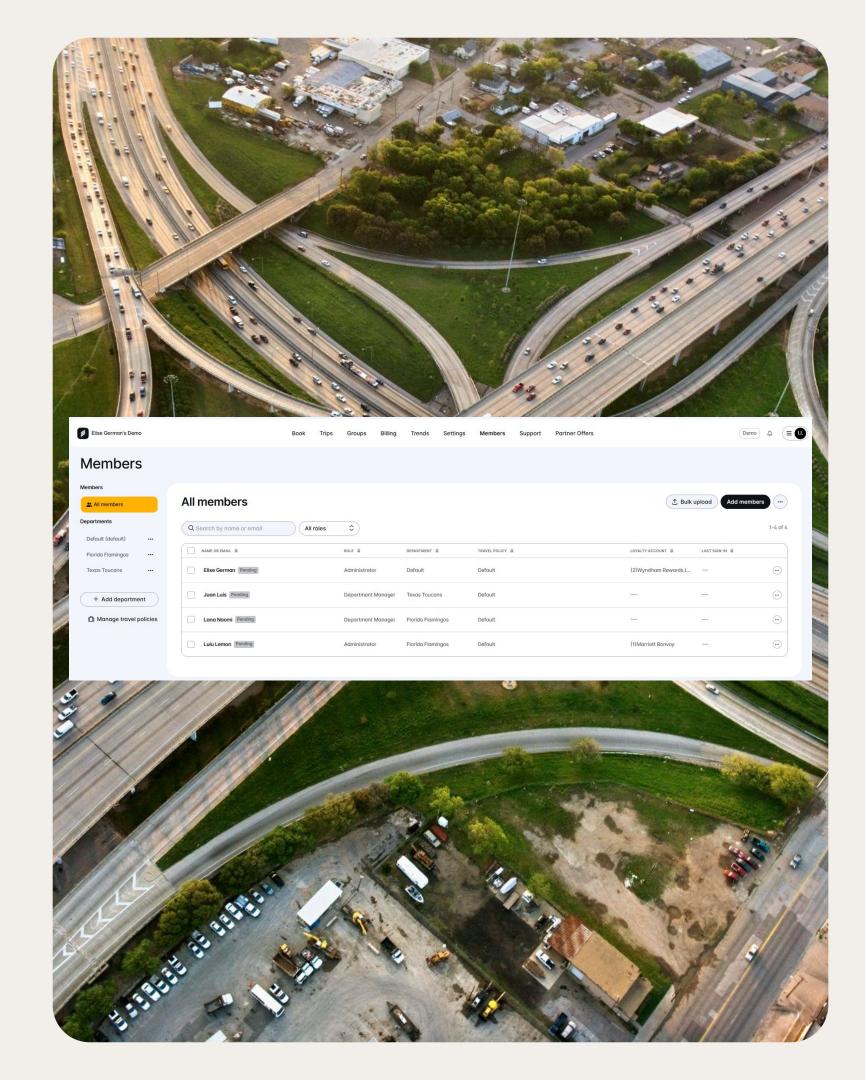
See a list of all members on your account, their role, department and assigned travel policy. Click the All Roles button to filter by specific role types. You can also see who has not accepted their invitation and resend by clicking on the three dots.

Search

Type in a name or email to quickly find a specific member.

Edit members

Click on a member's name to edit their profile to delete the member. From the edit screen, you can save a hotel loyalty account to auto-link it to future reservations for that member, allowing them to earn loyalty points.



Change member privileges

Click the box to the left of a member's name to change their department or assign a travel policy (this action can be done in bulk by selecting multiple members at once).

Add members

Use the **Add Members** button to invite new users to the account. Start by setting their role:

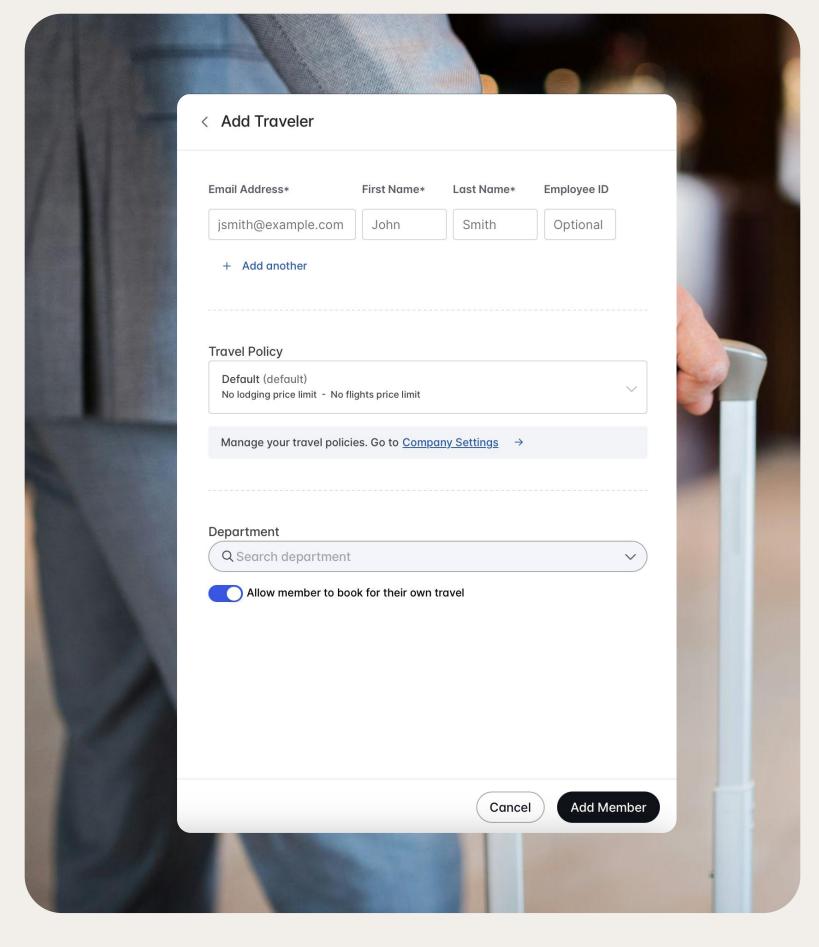
Admins can view and use all functions on the platform.

Coordinators can search and book hotels for themselves and other users of the agency account. Can access Trends reports IF enabled by an Admin.

Department Managers can search and book hotels for themselves, and other members within their delegated department.

Travelers can search and book hotels under set Admin permissions.





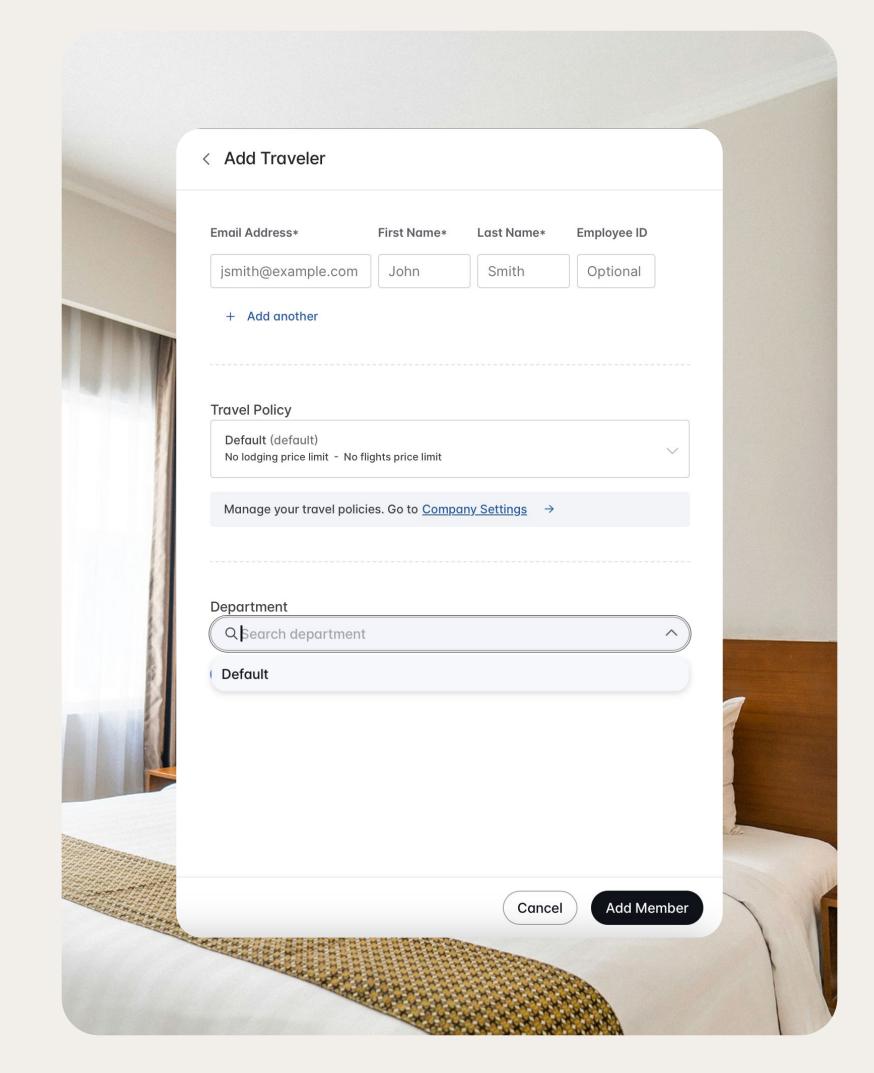
Travelers may be added with "view-only" permissions, meaning that they do not have the ability to book their own travel.

Add a department

Click Add Department at the left of your screen and fill out the department name and optional department ID. You can assign members to this new department at any time. This is a useful way to group members and assign travel policies that apply only to specific teams.

Manage travel policies

Click Manage Travel Policies at the left of your screen to view, edit and add Travel Policies. Use these policies to set stipulations like tiered nightly rates and access to Direct Bill and Incidentals Coverage, then assign them to individual members or entire departments.

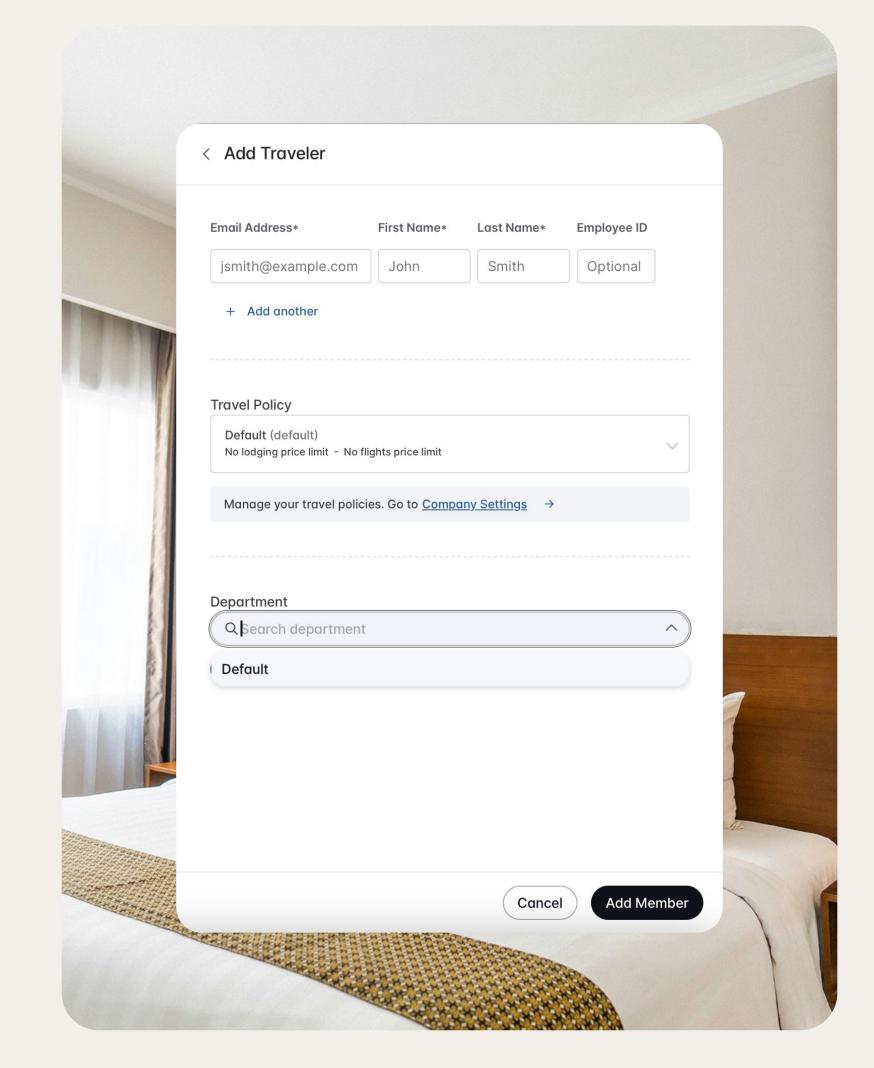


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Manage travel policies

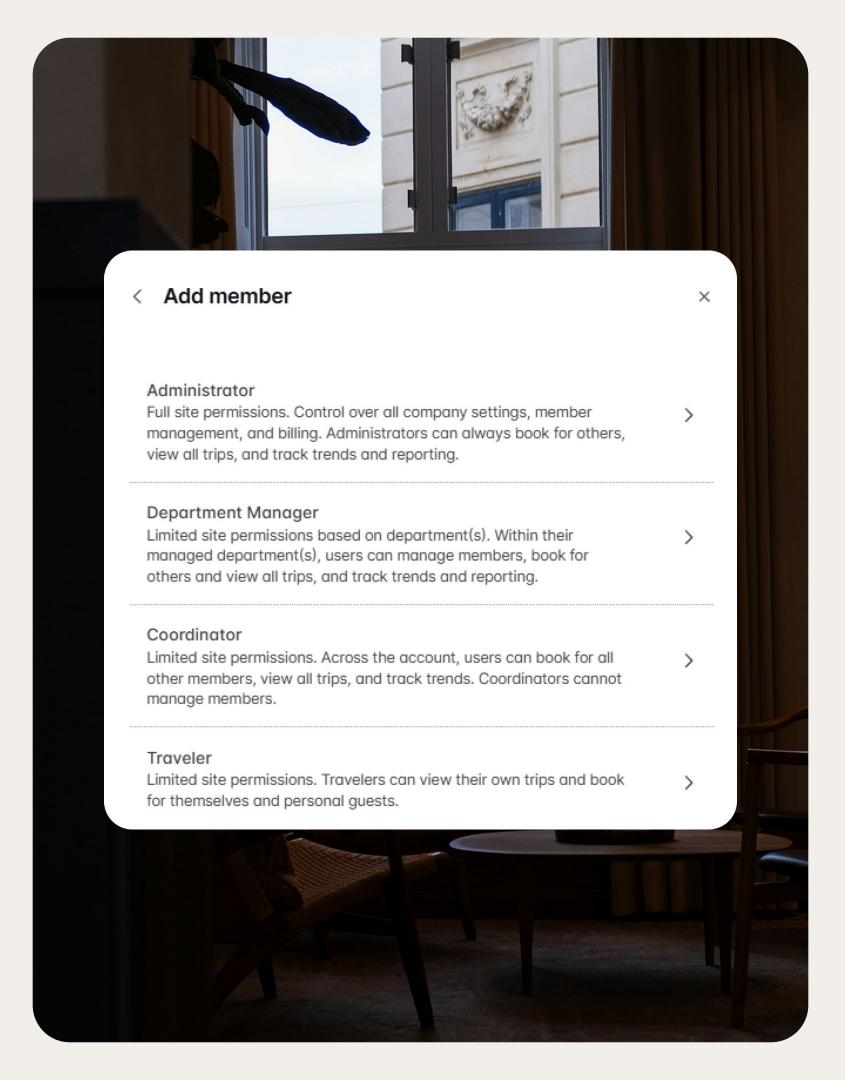
Click Manage Travel Policies at the left of your screen to view, edit and add Travel Policies. Use these policies to set stipulations like tiered nightly rates and access to Incidentals Coverage, then assign them to individual members or entire departments.



Why add members?

You have the option of adding Guests to reservations without creating an account for them. However, for repeat travelers who are employed by your agency, we recommended adding them as **Members** with their own Engine accounts.

Members can book travel for themselves (subject to the travel policies you set for them) and use more functionality on the platform, such as modifying travel dates and easily accessing itineraries. Members can also be added to reservations created by any admin at your agency, while guests are linked to your account only.

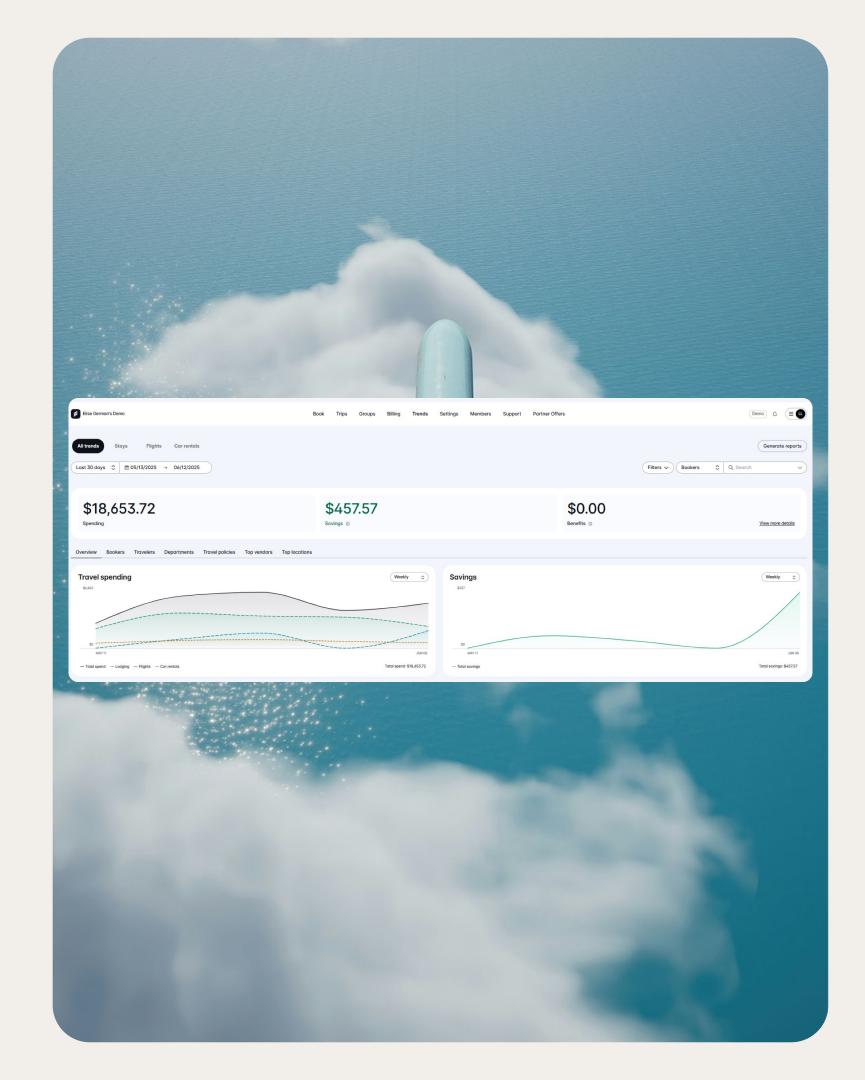


Trends

Keep an eye on your travel trends and access useful data. From this tab, you can:

- Access data on spending, travel destinations, top users and more
- Download reports to dive deeper

We'll cover each of these actions in the following slides.



Trends

Set time frame

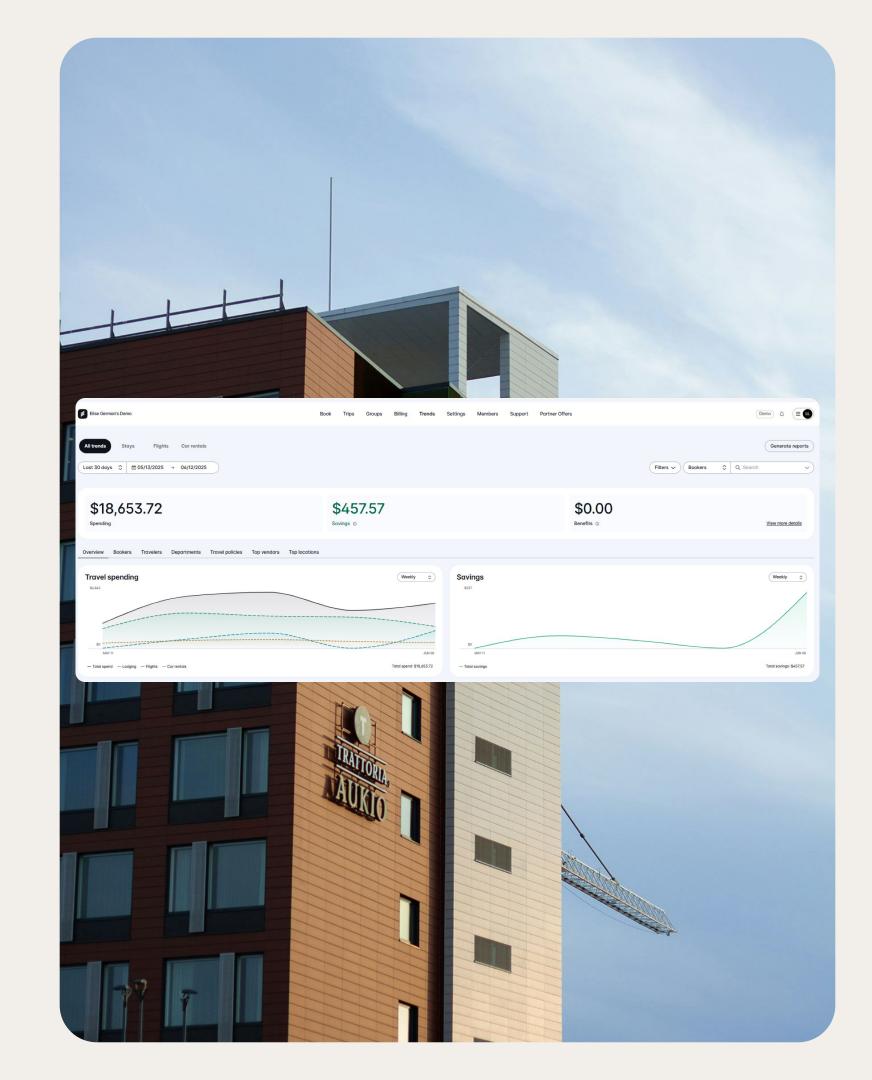
Click Custom and select your desired time frame from the drop-down box or input a date range to customize the data on this page.

Data overview

Real-time data snapshot displays total spend, savings, Engine Rewards earned, average nightly rate and rooms booked.

Data overview

Real-time data snapshot displays total spend, savings, Engine Rewards earned, average nightly rate and rooms booked.



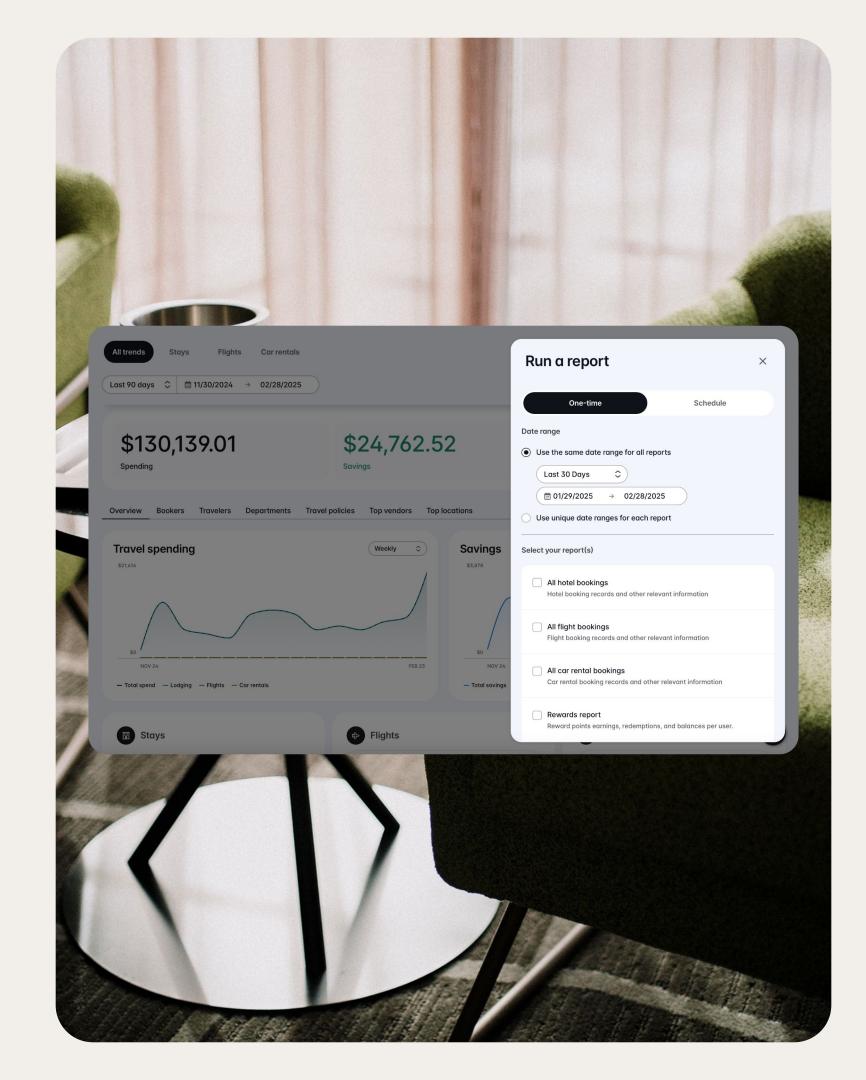
Trends

Export reports

Click the Send Reports button at the top right to generate various helpful reports. Use the first check box to generate an All Bookings Report or select another option. You'll receive a link in your email to download a report in CSV format.

View activity

Jump to specific data points using the Activity categories on the left side of your screen. Each activity page offers the option to download the information as a CSV report.



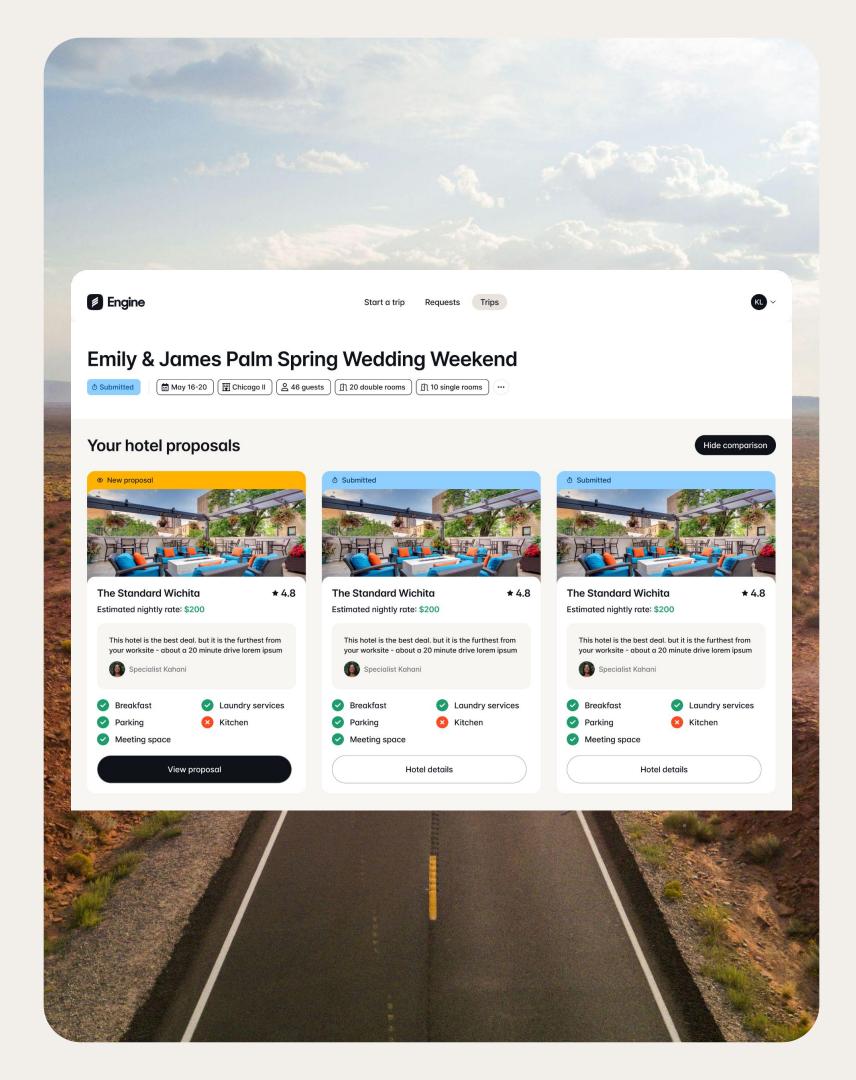
Contracting

Your dedicated Groups Specialist will guide you through the contracting and pre-check-in process, including: finalizing agreements, updating rooming lists and confirmations, and confirming payment.

Canceling or modifying

You can cancel an order at any point in the booking process by clicking the three dots on the right and selecting Cancel.

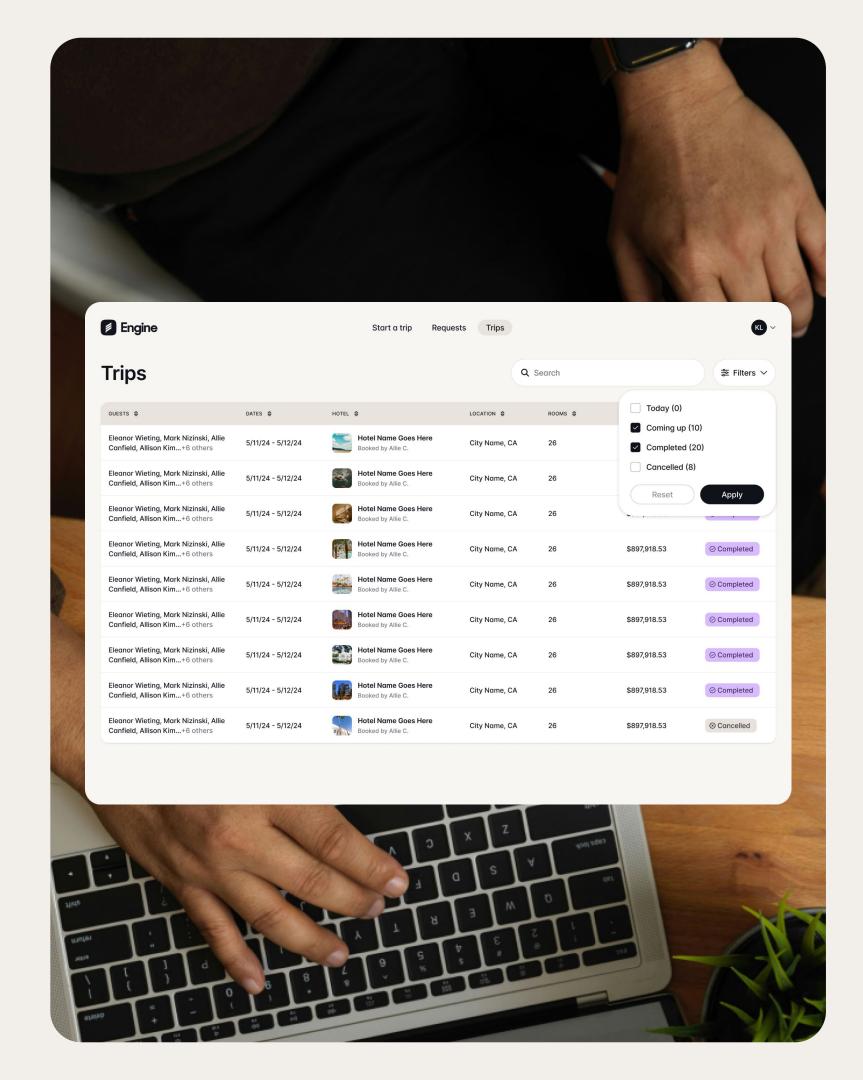
Your Groups Specialist can help with any trip modifications leading up to check-in. For the fastest turnaround time, include the hotel, confirmation numbers, and guest names if applicable.



The Groups tab is your control center for requesting, planning and tracking large or complex bookings that the Engine group team coordinate on your behalf. From this tab, you can:

- Submit a group trip request
- Track status of open requests
- Manage hotel properties
- Access information about group trips

We'll cover each of these actions in the following slides.

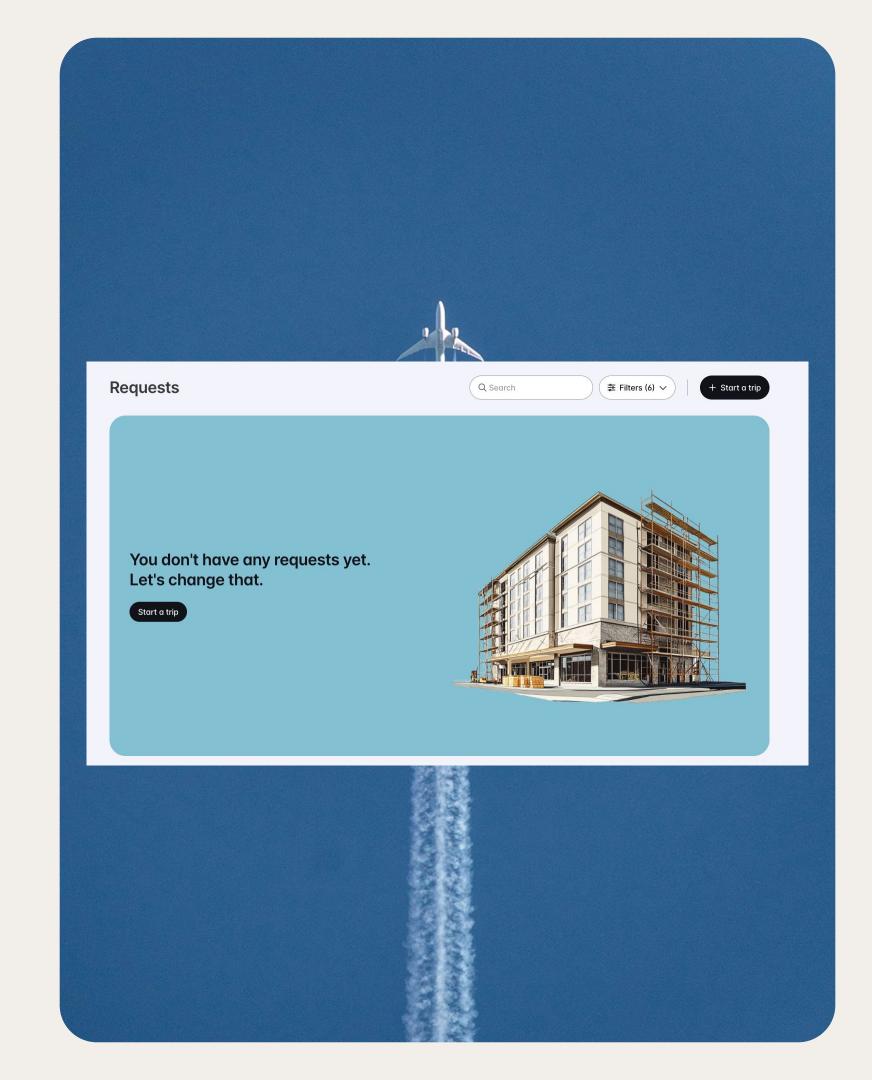


Submit a trip request

Click New Trip at the top right and follow the prompts to submit information about your group's needs (including any meeting space required). The Engine Groups team will get to work sourcing hotels that meet your requirements and negotiating rates. You'll be contacted by the team when proposals are ready for your review. The more detailed your request is, the faster the team will be able to find suitable options for you.

Be sure to select the appropriate payment method in your request:

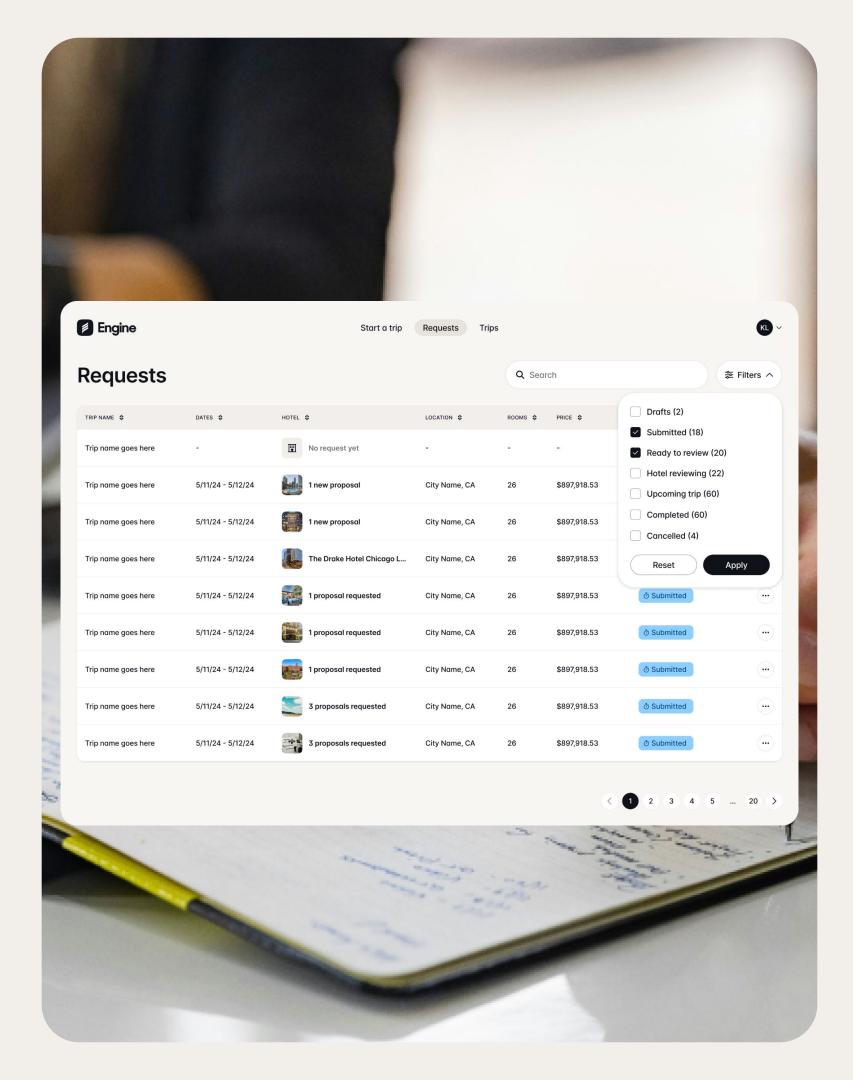
- Direct Bill
- Credit Card
- Individual pay at hotel (your Groups Specialist will confirm whether all reservations will be paid individually or on a single card)



Track status

Under Open Requests, you'll see each request that has been submitted and the status of the request at the right side. When proposals are ready to review, the status will show New Hotels. Open the trip to review your options.

You can also find information on all active and completed group trips.

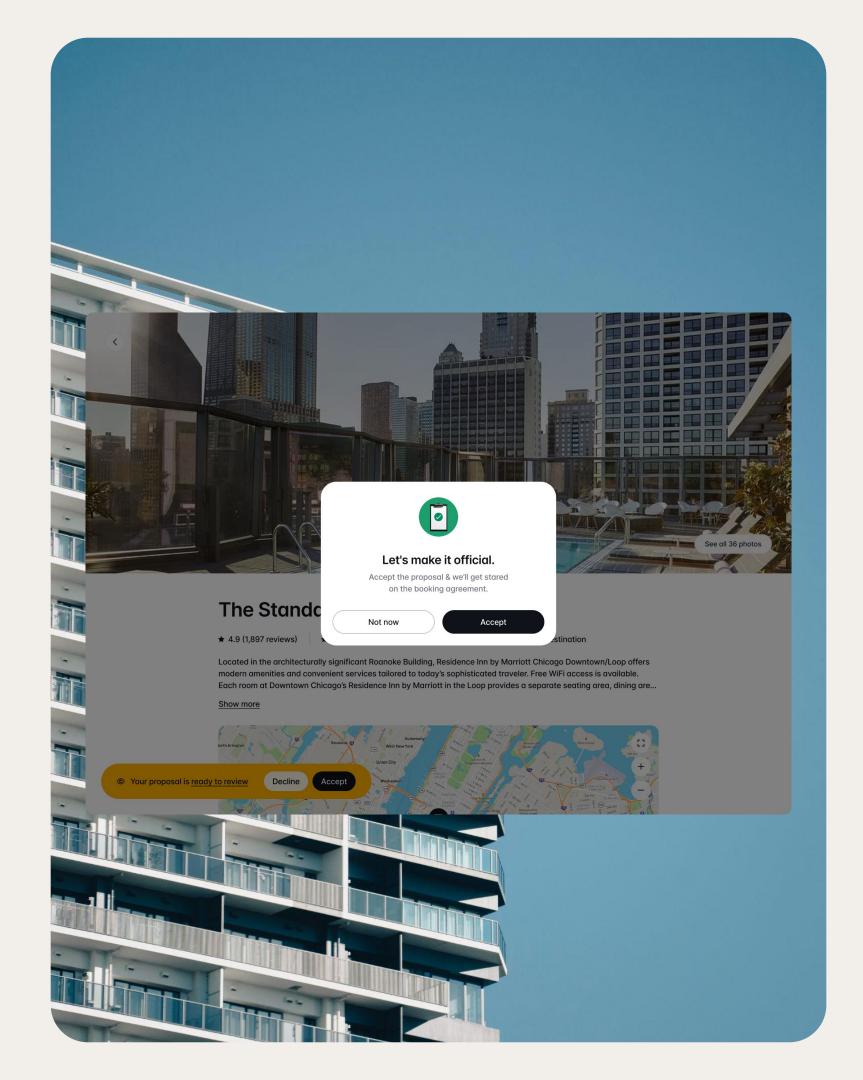


Review proposals

Open the trip and toggle to Hotel Proposals. Review the available hotel options, their nightly rates, notes from your Group Sales Manager, available amenities from your request checklist, location, photos, reviews, and other hotel information.

Accept or decline

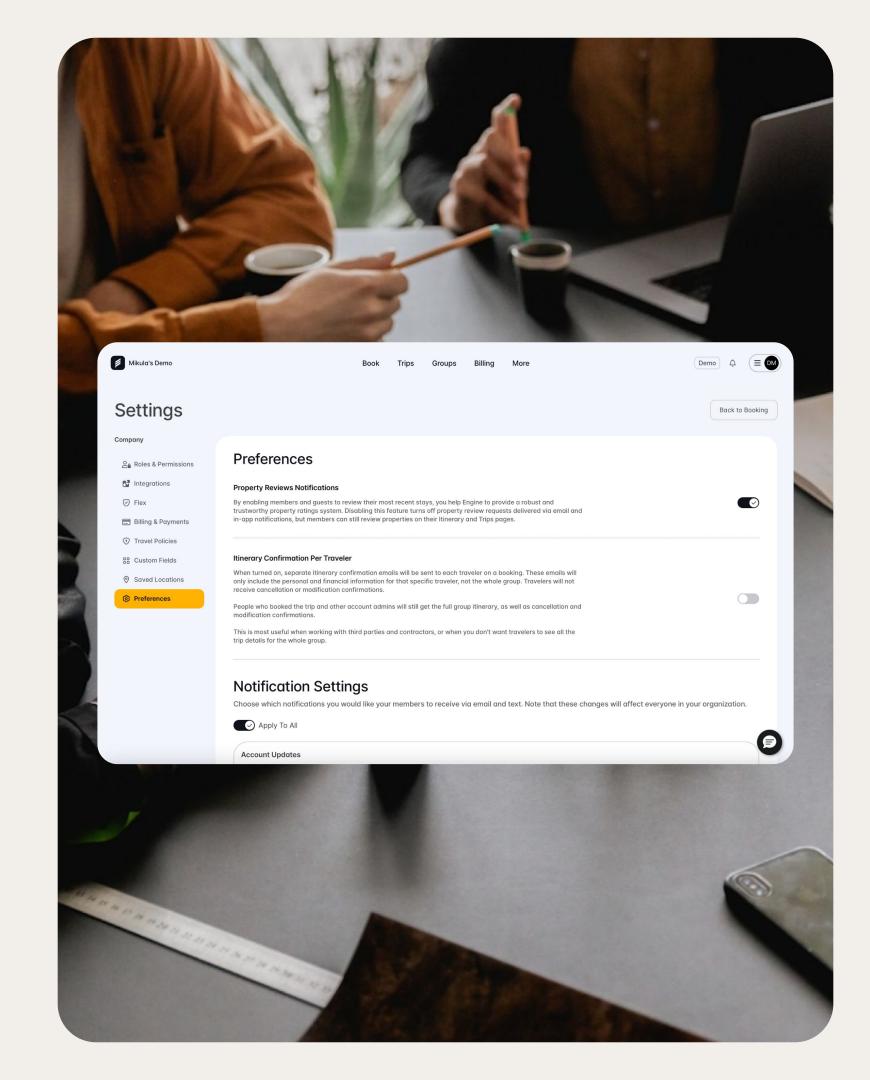
To move ahead with the hotel, click the Accept button. Your Group Sales Manager will reach out to the hotel and start the paperwork, and you'll be contacted via email with next steps. If the hotel doesn't look like a fit, click the Decline button.



Use Company Settings to customize your Engine experience and tailor the platform functionality to suit your business needs. From this tab, you can:

- Add your logo and adjust settings
- Establish travel policies
- Set custom fields
- Integrate with payment and HR platforms
- Customize communications

We'll cover each of these actions in the following slides.

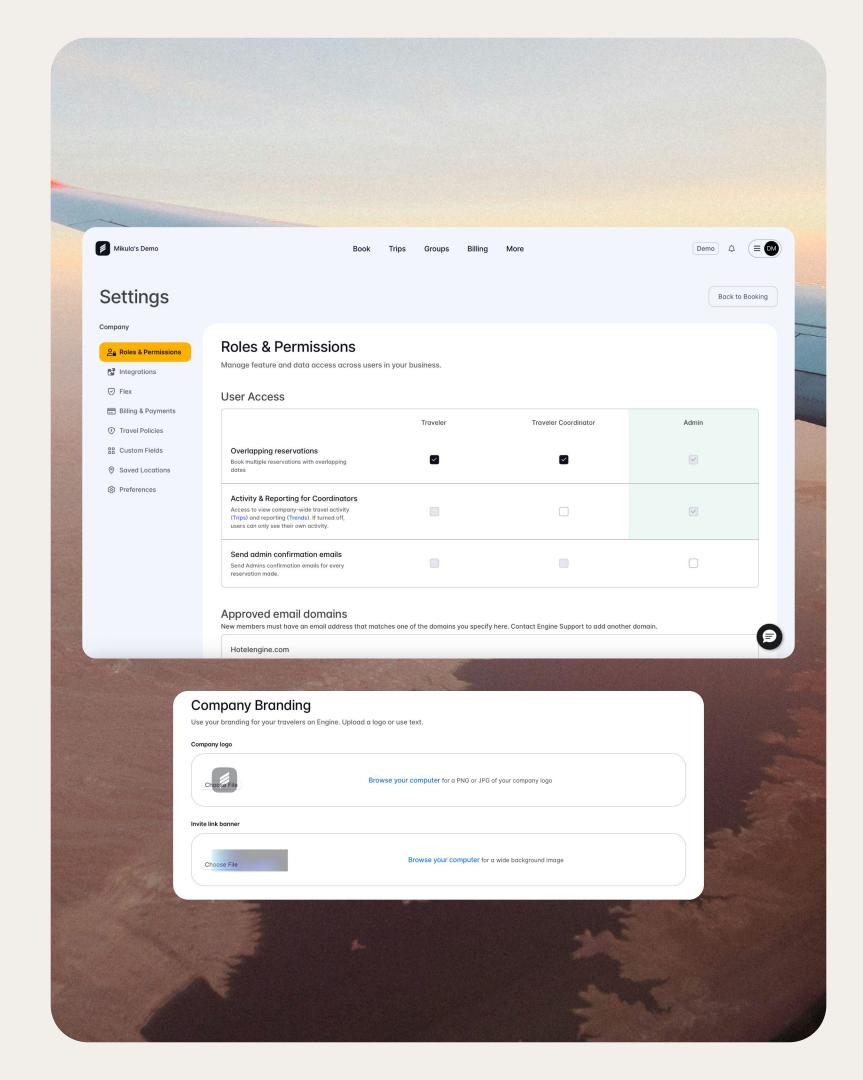


Controls

Go to the **User Permissions** tab to enable special permissions for your agency's Coordinators. *Do not change other settings in this section*.

Company Branding

Your dashboard is your space — it should fit your branding. Under the **Company Branding** tab, you can upload your agency logo.



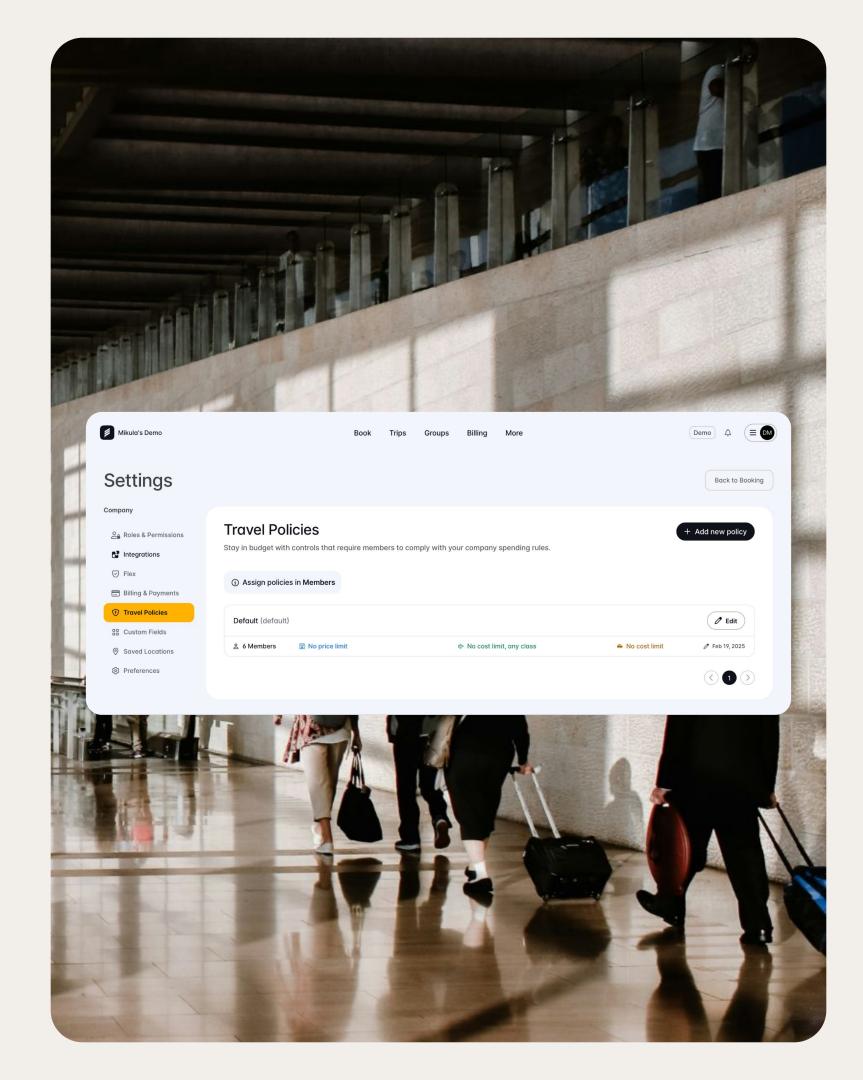
Travel policies

View your active Travel policies here. To edit one, click on Edit. Use the blue button to add a travel policy. Travel policies can include:

- Maximum nightly rate (which can be set with tiers to automatically adjust if booking in a higher cost area)
- Direct Bill access
- Incidental Coverage access

Custom fields

View and add custom fields, which are pieces of data that can be captured at the time of booking to display on the trip itinerary and reporting. Custom fields can be set as optional required, and you can stipulate which types of users will see them.

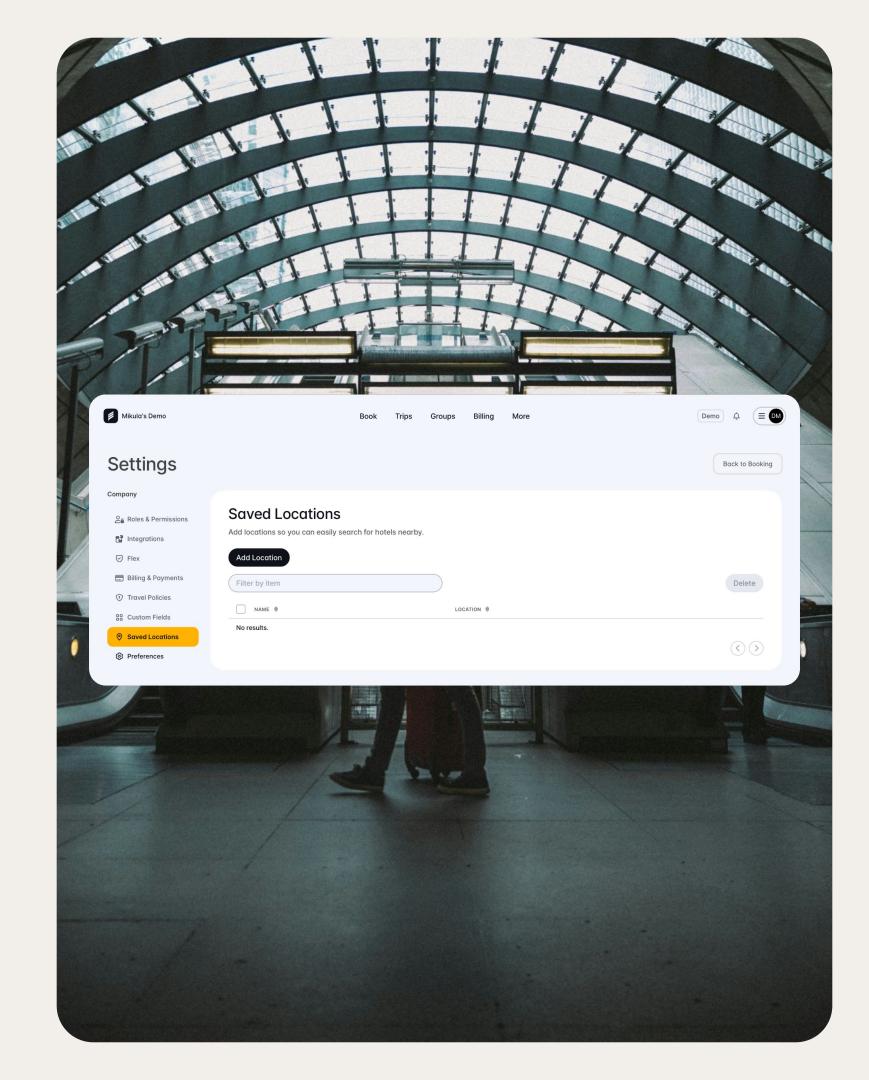


Saved locations

Save frequently used locations — such as job sites, frequent travel locations, or conference spaces — so you can quickly search for hotels nearby.

Integrations

Enable Engine to share select data with your team's other software tools, such as Expensify or over 50 HR platforms.

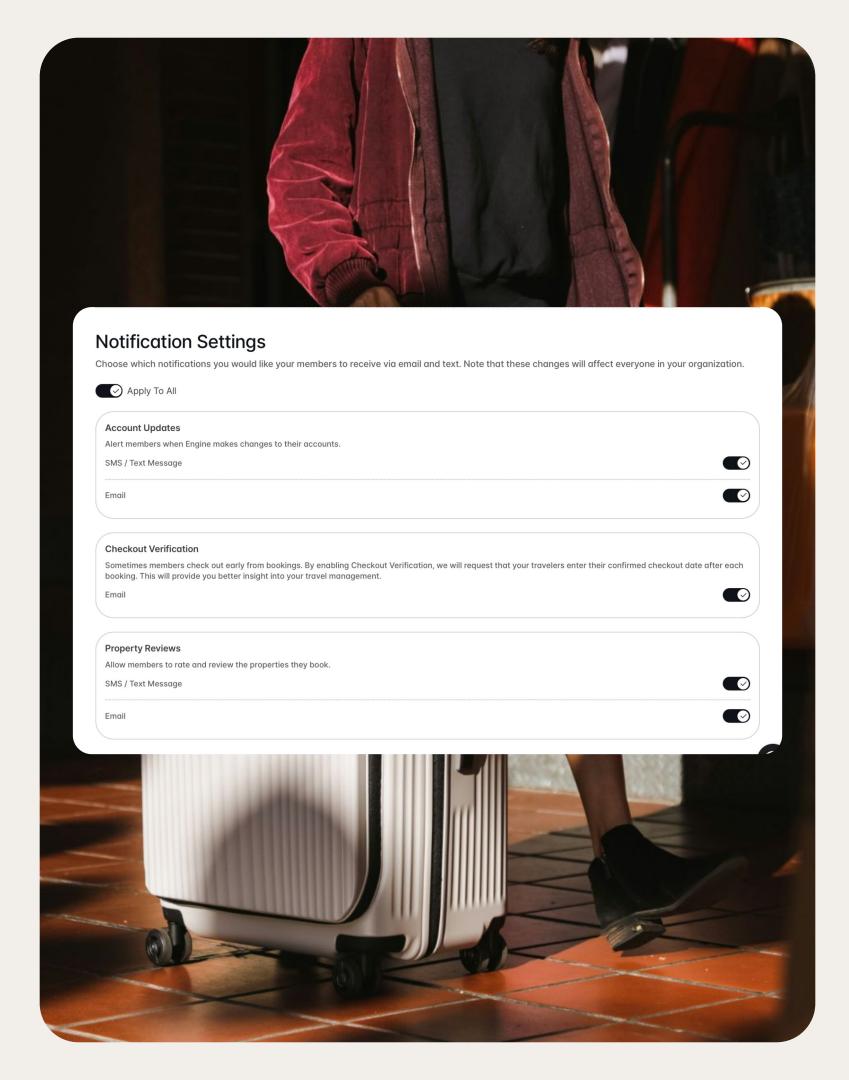


System emails

Add custom text to system-generate confirmation and cancellation emails. You can set custom text by specific roles and payment types.

Company notifications

Set which notifications your members will receive. Enable SMS or email notifications (or both).



Final Notes: Important Reminders

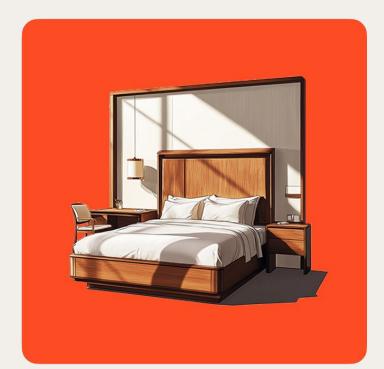
Payment: You will not be charged at the time of booking, and the primary guest will pay at the hotel.

If a department card will be used to pay for this reservation, please contact the property directly to obtain the hotel's Credit Card Authorization form. This form will need to be acknowledged by the property at the time of traveler arrival. If this is delayed, the card provided on file may be charged.

GSA: The State of Texas requires all travelers who are eligible for reimbursement to select rooms that are priced at or below the listed GSA rate for your assigned duty point to quality for full reimbursement. The State of Texas also requires all travelers to obtain an itemized folio from the hotel upon check out in order to process reimbursement claims. Please review all hotel folios for charge and payment accuracies upon receipt.

Loyalty: If a loyalty eligible room is booked, the folio will show up in the traveler's account as a digital copy.









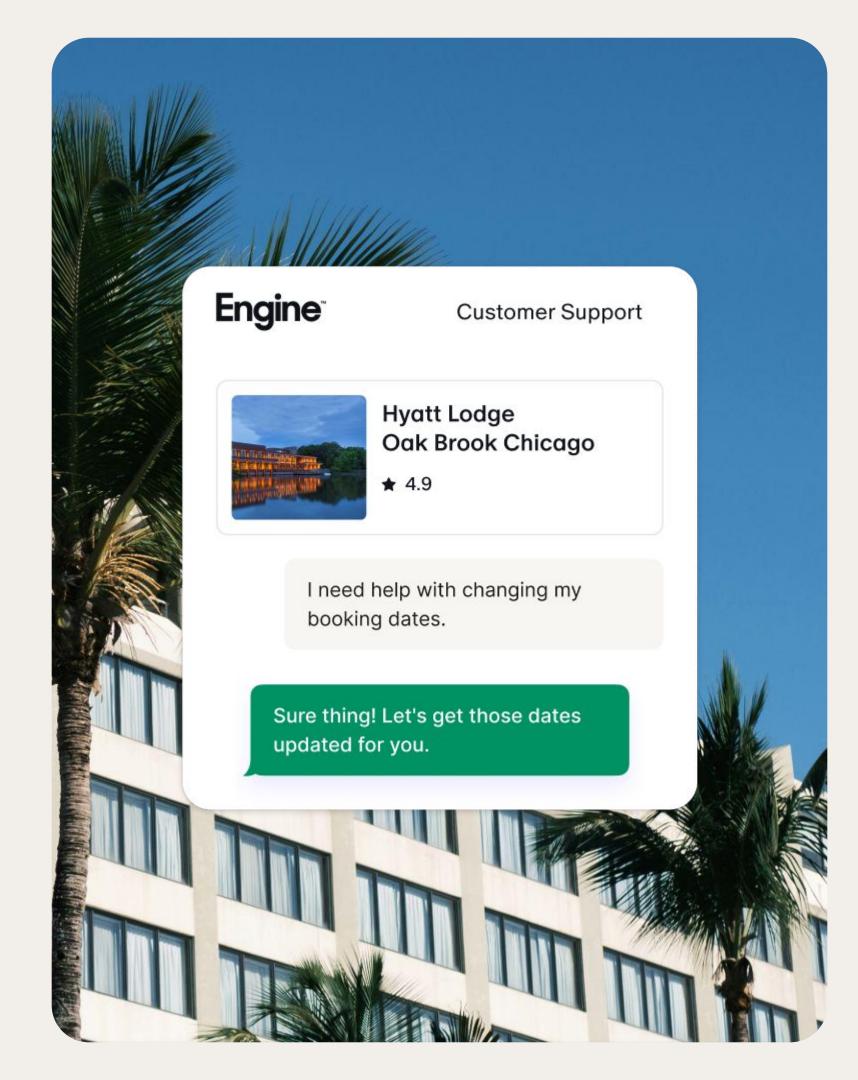
Support Center

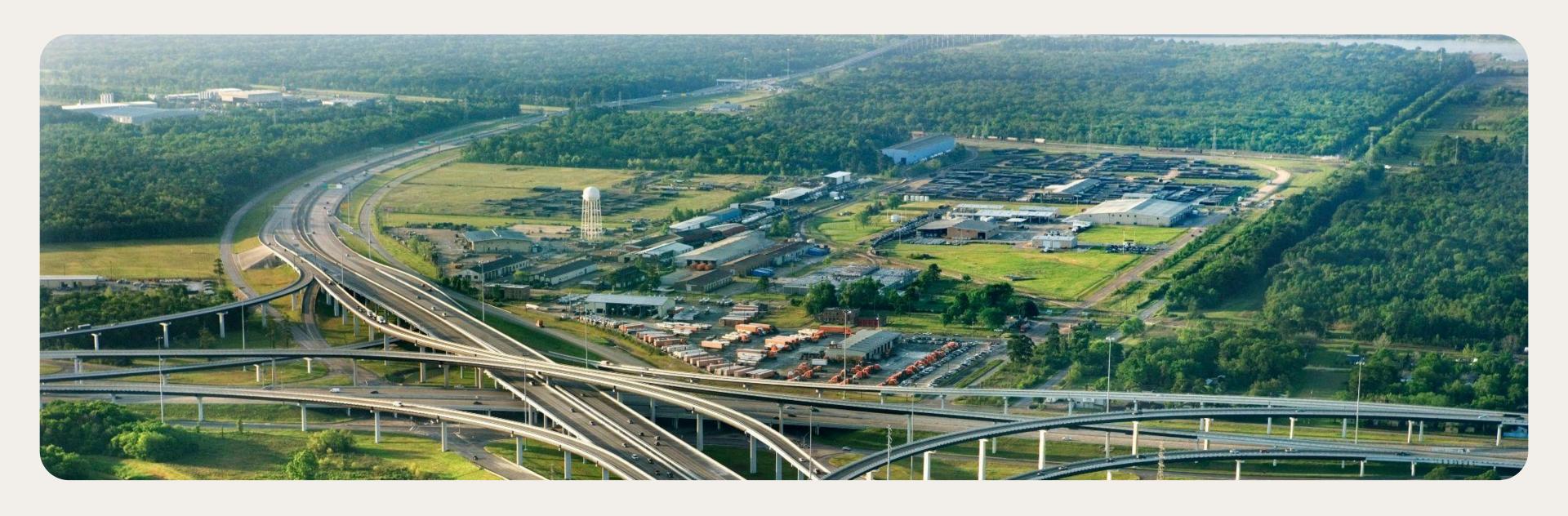
Our world-class, 24/7 Member Support team is always here to help—but now we're making it easier to stay on top of requests and get faster, more convenient answers to your questions.

With Support Center, you can take advantage of centralized case management to track and view open support cases, getting real-time updates without needing to wait for a return phone call, email or chat.

To access this information, click **Support Center** on the top navigation bar. Support Center is especially helpful for tracking cases like:

- Cancellations
- Booking modifications
- Special requests for the hotel
- Incorrect or unexpected charges





State of Texas Support Team

Contact your State of Texas Support Team 24 hours a day, 7 days a week with any questions or concerns

Office (800) 803-0452

Email

support@engine.com

Live chat on

Engine.com