

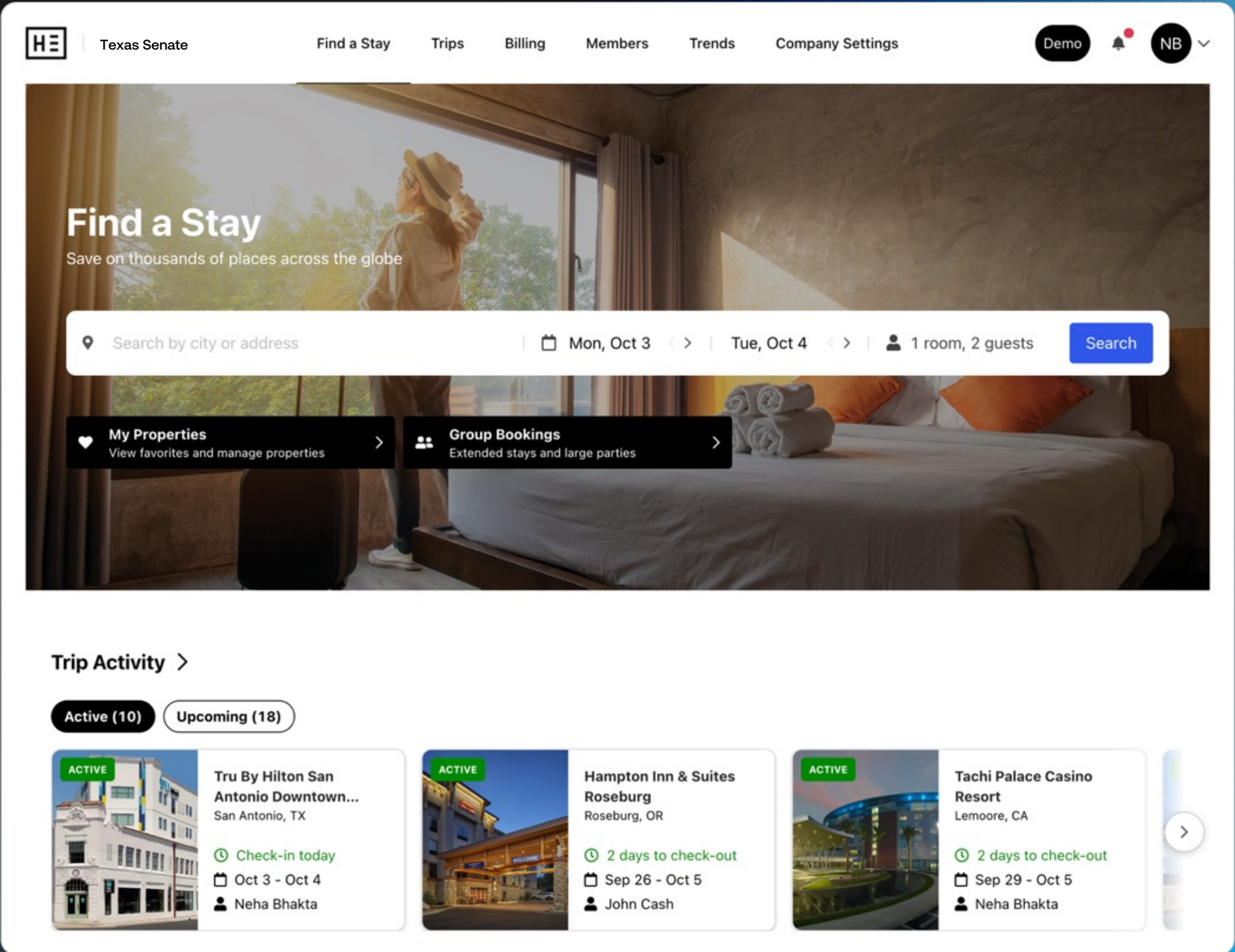
Traveler's Guide: Direct Bill

Role: User

State of Texas Customer Support

(800) 803-0452

Support@hotelengine.com



Introduction

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

Roles:

Admins:

Can view and use all functions on the platform. Can enable Coordinators to see trends reporting and view other traveler trips.

Coordinators:

Can search and book hotels for themselves and other users of the agency account. Can access trends reports and view other traveler trips IF enabled by an Admin.

Users:

Can search and book hotels under set Admin permissions.

This guide walks you through all the functionality on Hotel Engine for the “User” role.

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Create your account

1 You're invited to Hotel Engine

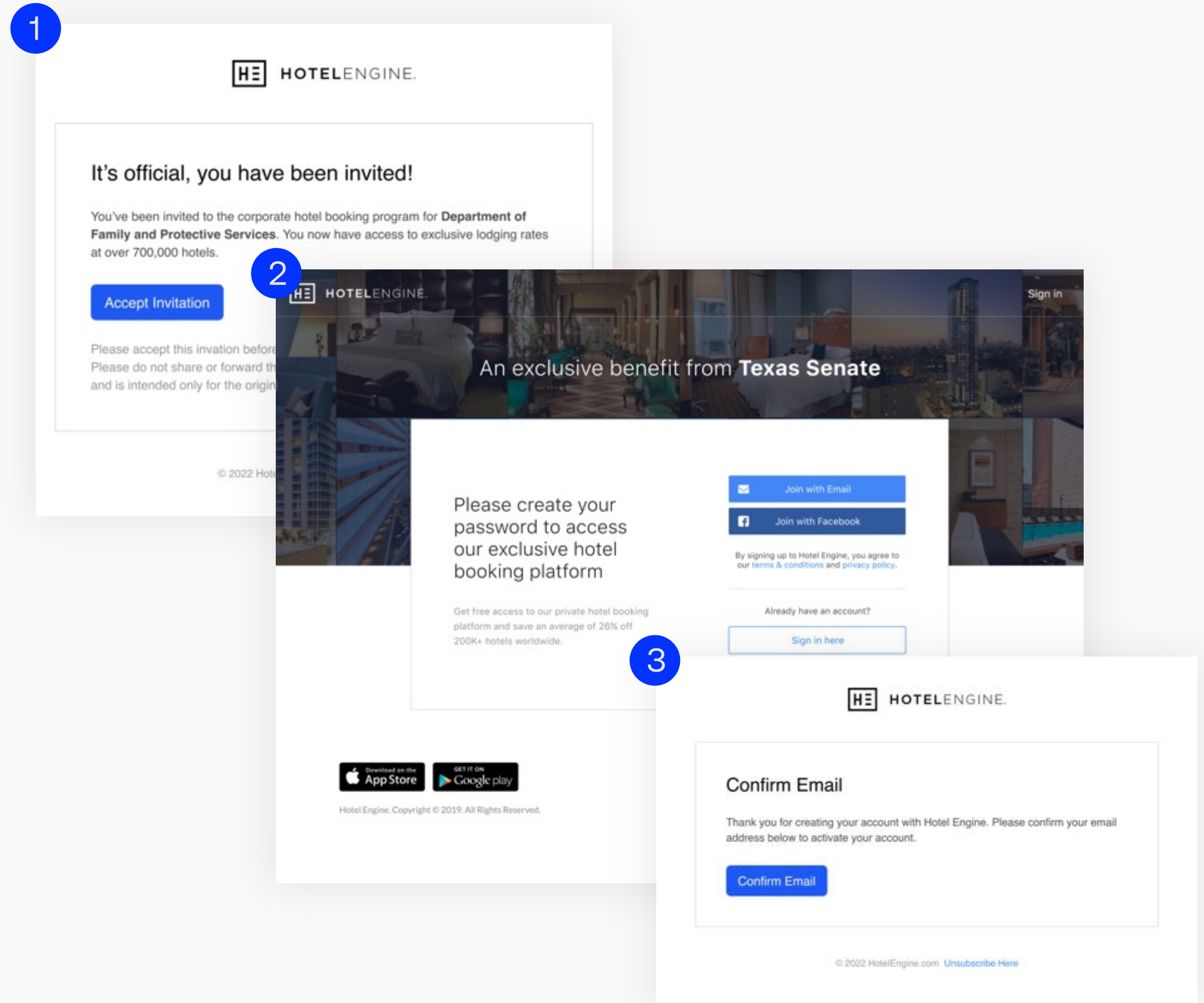
You will receive an email asking you to accept your invitation to create your Admin account. Click the “Accept Invitation” button.

2 Create your password

Once you click the “Accept Invitation” button, you will be redirected to a page that asks you to create your account. Join using your state email address and set your password.

3 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 Hotel Engine member home page.



Profile settings

1

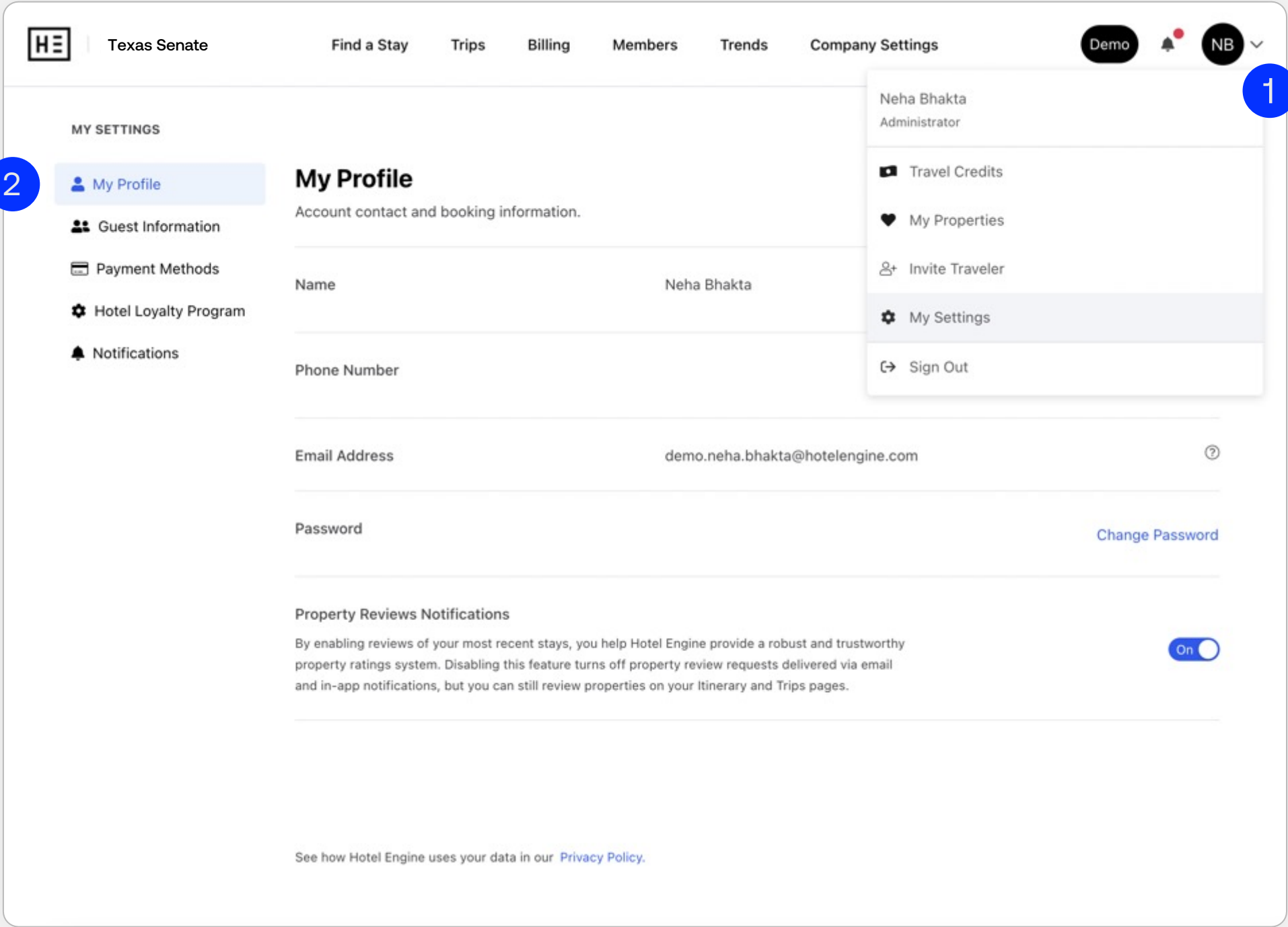
Open settings

Click on your account name in the top-right of the screen and then select “Settings” from the dropdown.

2

My profile

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



Profile settings

3 Stored cards

Every member must enter a credit card number or have a credit card on file to reserve a hotel room. This credit card information will be sent to the hotel to secure the reservation, but it will not be charged at the time of booking. Need to add one?

1. Click “Add Card” in the bottom-left of the screen.
2. Input the credit card details and optional nickname.
3. Click “Save.”

Guests Will Pay at the Hotel

For every booking, the primary guest will pay for the full reservation with a payment method of choice at the hotel. Credit cards used to secure reservations will still need to be presented to the hotel at the time of check in if that card is to be used as the method of payment. Guests claiming hotel tax exemption must bring a completed tax exemption certificate (see next page).

The screenshot displays the Hotel Engine user interface. At the top, the navigation bar includes the 'HE' logo, 'Texas Senate', and links for 'Find a Stay', 'Trips', and 'Billing'. The main content area is divided into 'MY SETTINGS' on the left and 'Payment Methods' on the right. The 'MY SETTINGS' sidebar lists 'My Profile', 'Guest Information', 'Payment Methods' (highlighted with a blue circle and the number 3), 'Hotel Loyalty Program', and 'Notifications'. The 'Payment Methods' section contains the text 'Add payment information now to make your ne' and a blue 'Add Card' button. An 'Add Card' modal is open on the right, featuring input fields for 'Cardholder name' (with placeholder 'Full name on card'), 'Card number', 'Exp. date' (placeholder 'MM/YY'), 'Security code' (placeholder 'CVV'), 'Zip code' (placeholder 'Zip code'), and 'Card nickname (optional)' (with placeholder 'Ex: Personal Travel'). There is a checkbox for 'Make default card' and two buttons: 'Save Card' and 'Cancel'. At the bottom of the modal, a link states 'See how Hotel Engine uses your data in our Privacy Policy.' The footer of the page includes links for 'Company' (About Us, Careers, Blog), 'Support' (Help Center, FAQ, Contact Us, Group Bookings, Terms & Conditions), and a cookie notice: 'Our site uses cookies to ensure you get the best experience while using it. By clicking 'Accept', you agree to our [privacy policy](#) or click 'Manage' to review your cookie preferences.'

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:

<https://comptroller.texas.gov/taxes/hotel/forms/>

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 the hotel and handle waiving taxes directly with the hotel.

State travel coordinator list:

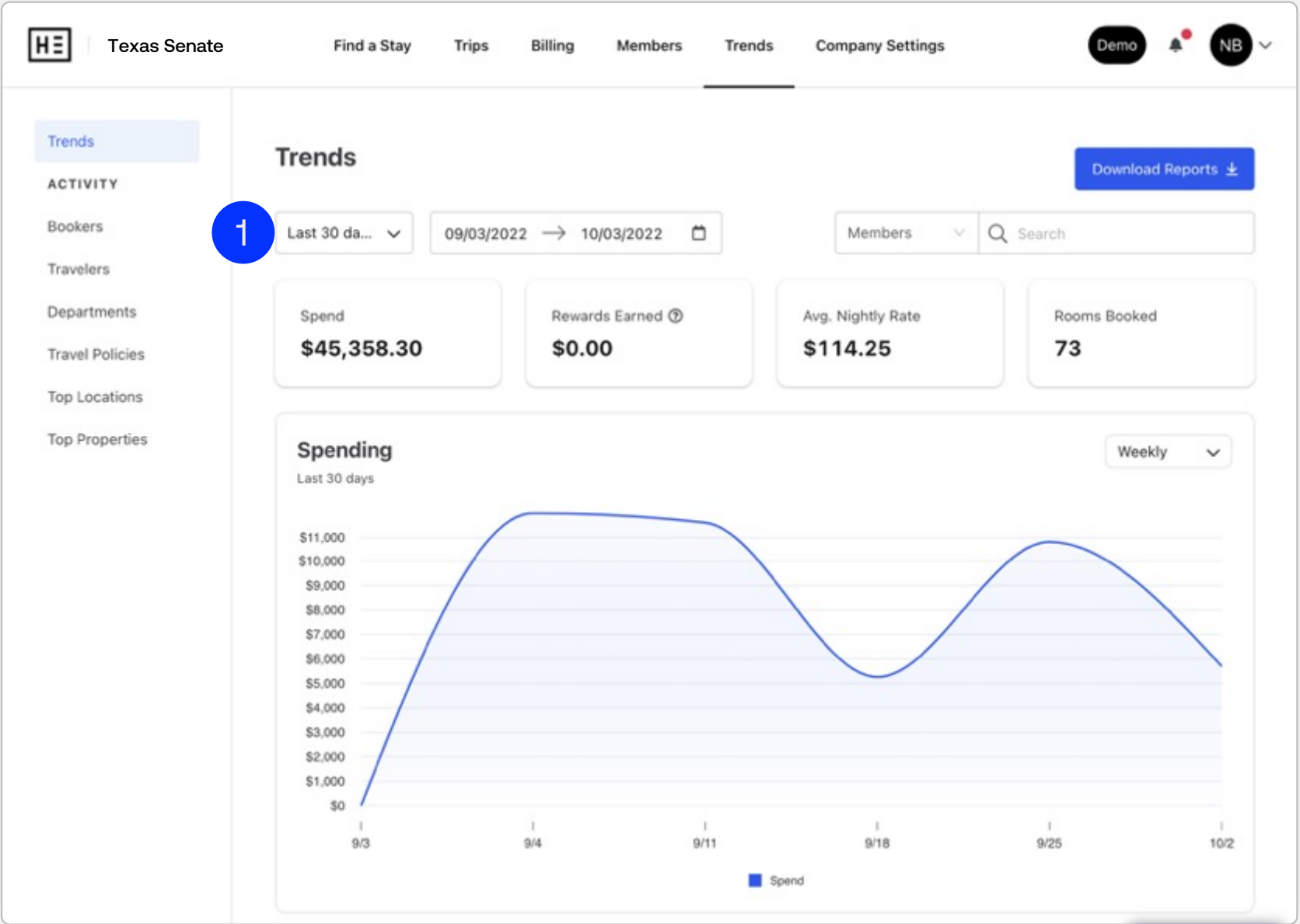
<https://comptroller.texas.gov/purchasing/programs/travel-management/coordinators.php>

Dashboard snapshot

The “Snapshot” section consists of dynamically updated data that is highly personalized to your needs. Your “Snapshot” is designed specifically for you, based on your user role, permissions, and account-specific requirements.

1 **30-day activity**

In the “30 Day Activity” section, we highlight savings, nights booked, spend, average nightly rate, and new users added. This data is dynamically updated.



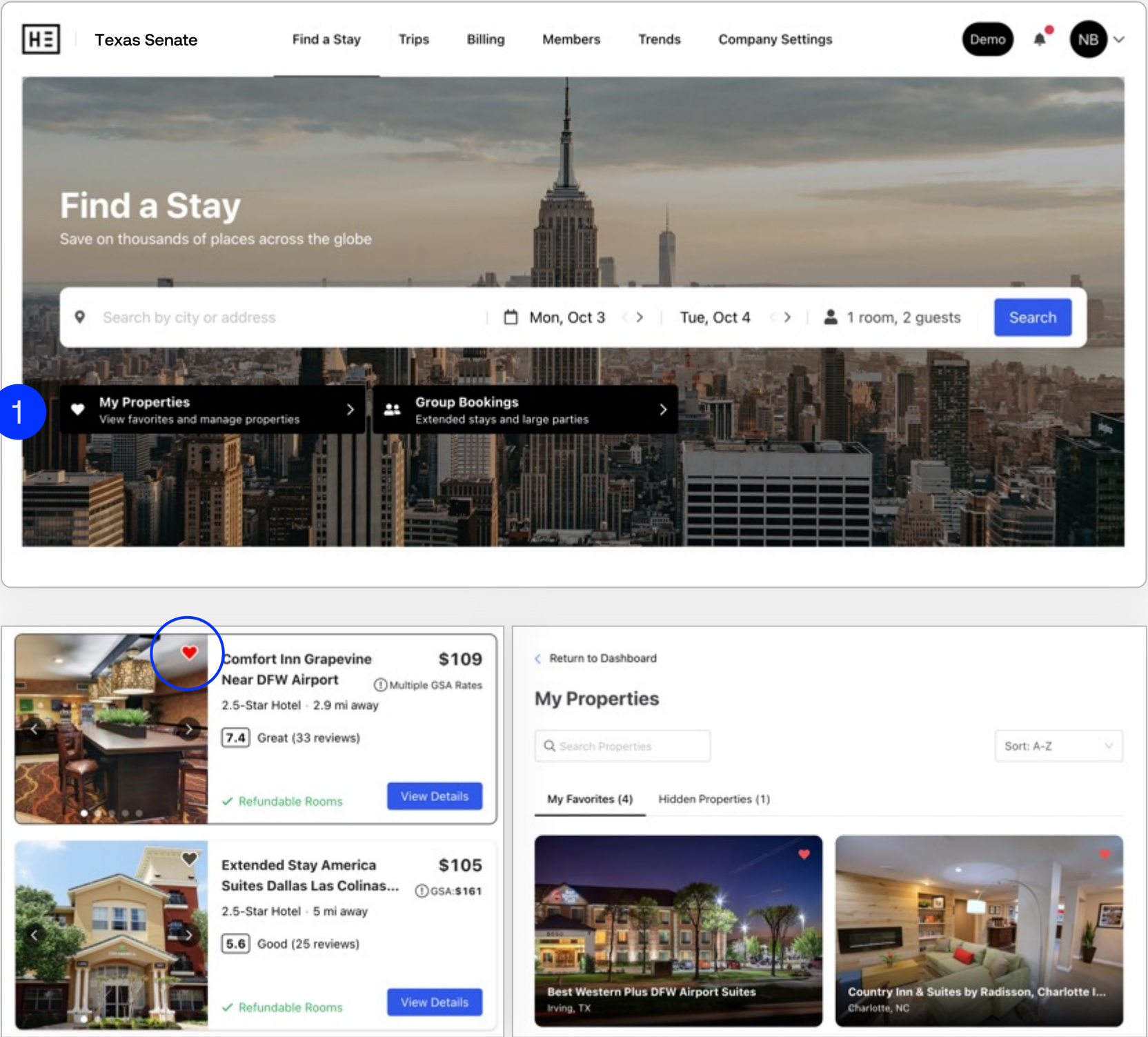
My favorite hotels

1 **My favorite hotels**

The “My Favorite Hotels” section gives you the ability to quickly find and go to individual property pages to book rooms.

Click the heart on your favorite hotels to add it to the “My Favorite Hotels” section and get quick access to re-book from your dashboard.

You can sort your favorites on your dashboard by location, hotel name, last booked, and most frequently booked with the “Sort by” drop-down menu in the top-right side of the section.



Trip management

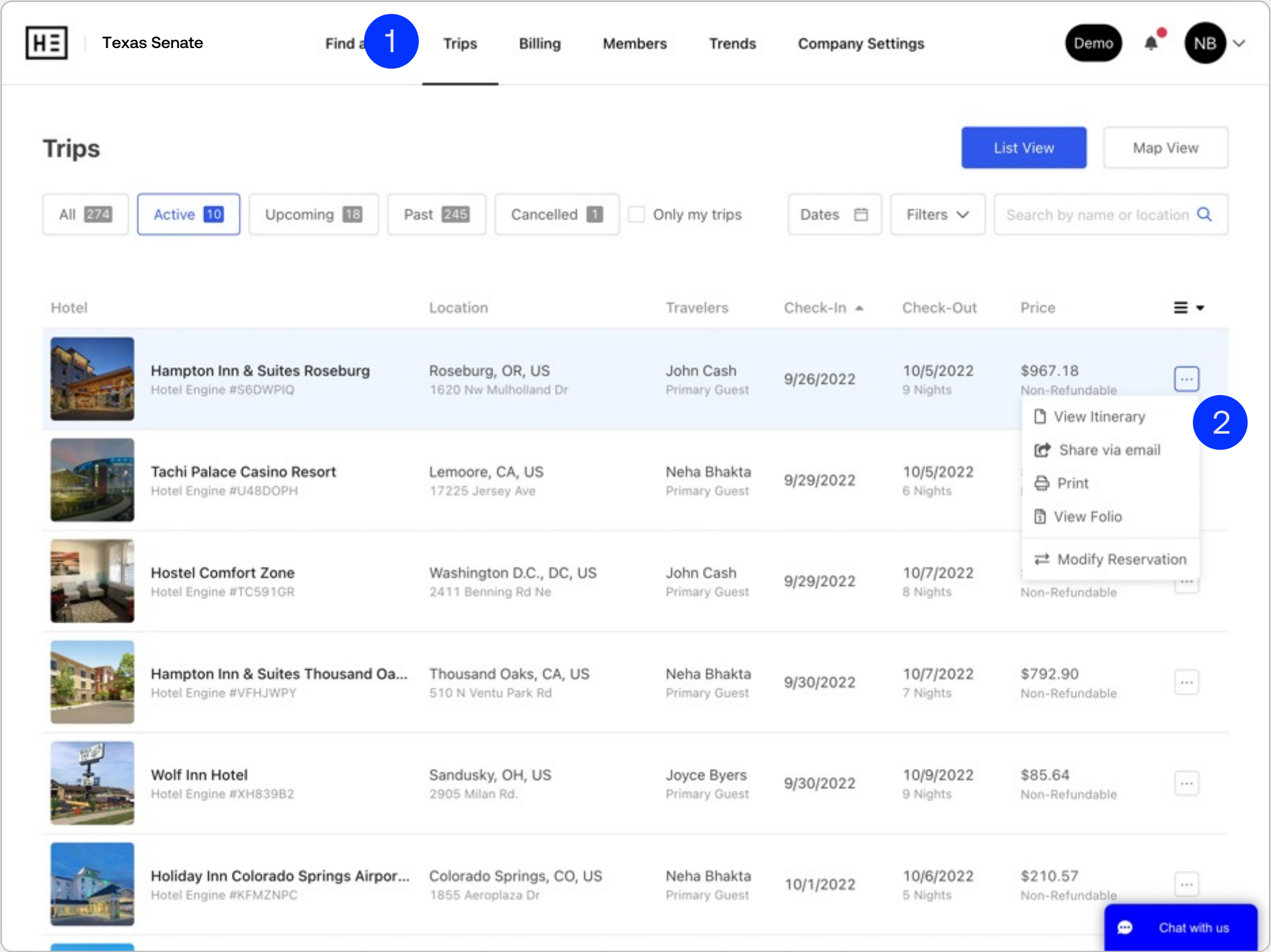
1 Trip summary

The trips summary section provides a high-level view of relevant trips that you have booked, highlighting active, upcoming, and recently booked.

Each trip row is comprised of the hotel name, hotel location, traveler name(s), and check-in or check-out dates depending on trip status. If you click on an individual row, you will see more details about that trip.

2 Trip details menu

You can access this menu by clicking the three-dot button whether the trip row is expanded or not, and it gives you some very handy tools. In this menu, you can view, share, or print the trip itinerary as well as view the property details if you want to verify amenities or book a new trip.



Trip management

3 Modifying a trip

Depending on the trip type and cancellation policy, you may also cancel a trip from this menu. To submit a cancellation request after the cancellation deadline, please call Customer Support at 1-800-803-0452.

HE

Texas Senate

Find a Stay

Trips

Billing

Members

Trends

Company Settings

Demo

NB

Trips

List View

Map View

All 274

Active 10

Upcoming 18

Past 245

Cancelled 1

☐ Only my trips

Dates

Filters

Search by name or location

Hotel	Location	Travelers	Check-In	Check-Out	Price	
Hampton Inn & Suites Roseburg Hotel Engine #S6DWPIQ	Roseburg, OR, US 1620 Nw Mulholland Dr	John Cash Primary Guest	9/26/2022	10/5/2022 9 Nights	\$967.18 Non-Refundable	
Tachi Palace Casino Resort Hotel Engine #U48DOPH	Lemoore, CA, US 17225 Jersey Ave	Neha Bhakta Primary Guest	9/29/2022	10/5/2022 6 Nights		
Hostel Comfort Zone Hotel Engine #TC591GR	Washington D.C., DC, US 2411 Benning Rd Ne	John Cash Primary Guest	9/29/2022	10/7/2022 8 Nights		
Hampton Inn & Suites Thousand Oa... Hotel Engine #VFHJWPY	Thousand Oaks, CA, US 510 N Ventu Park Rd	Neha Bhakta Primary Guest	9/30/2022	10/7/2022 7 Nights	\$792.90 Non-Refundable	
Wolf Inn Hotel Hotel Engine #XH839B2	Sandusky, OH, US 2905 Milan Rd.	Joyce Byers Primary Guest	9/30/2022	10/9/2022 9 Nights	\$85.64 Non-Refundable	
Holiday Inn Colorado Springs Airpor... Hotel Engine #KFMZNPC	Colorado Springs, CO, US 1855 Aeroplaza Dr	Neha Bhakta Primary Guest	10/1/2022	10/6/2022 5 Nights	\$210.57 Non-Refundable	

3

View Itinerary

Share via email

Print

View Folio

Modify Reservation

Chat with us

Search

1 Search hotels

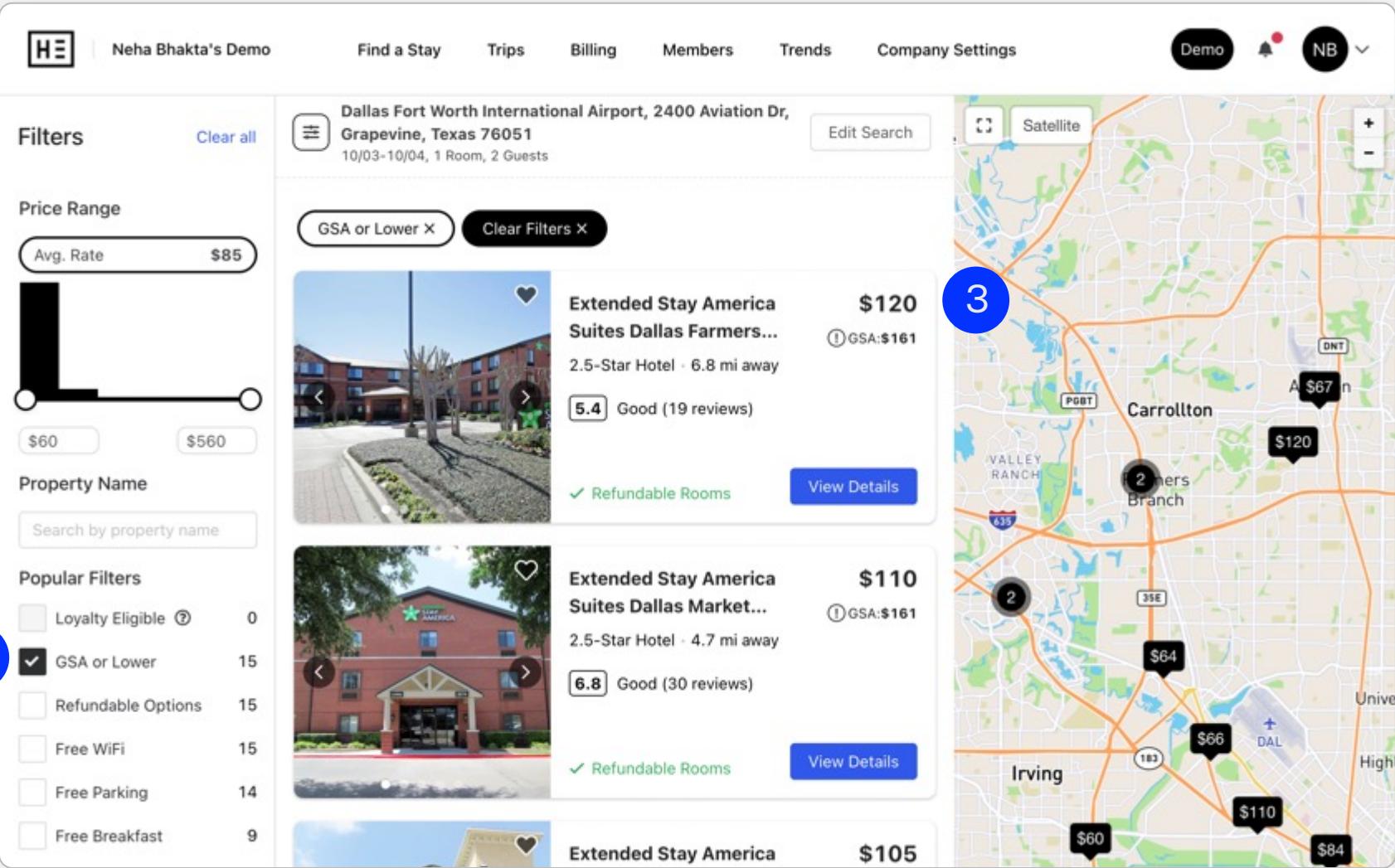
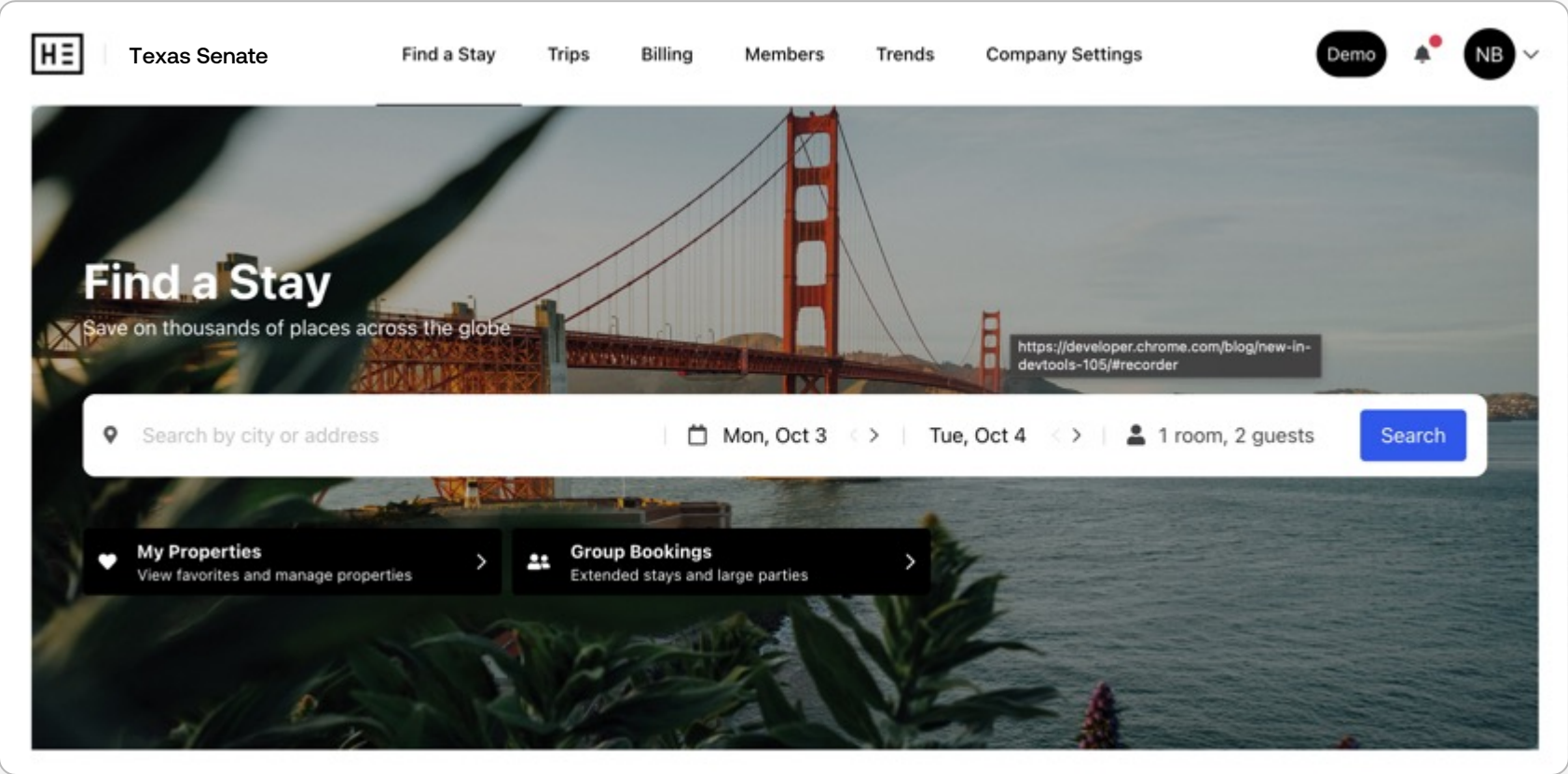
In the search bar at the top of the dashboard screen, enter the desired city, travel dates, and number of guests. Click “Search” to see the hotels matching your parameters.

2 Filter & sort results

Specialized filters make it fast and easy to book the perfect hotel — modify your results by price, distance, amenities, and more. You can also filter by hotels that are at or below the GSA nightly rate.

3 Estimated nightly rate

The message "Est. Nightly" appears when we know that the live hotel inventory availability is subject to change. Most of the time this rate will be consistent with the hotel inventory available to you in the hotel details page, but this rate is subject to change based on the live availability given to Hotel Engine by the hotel’s system.



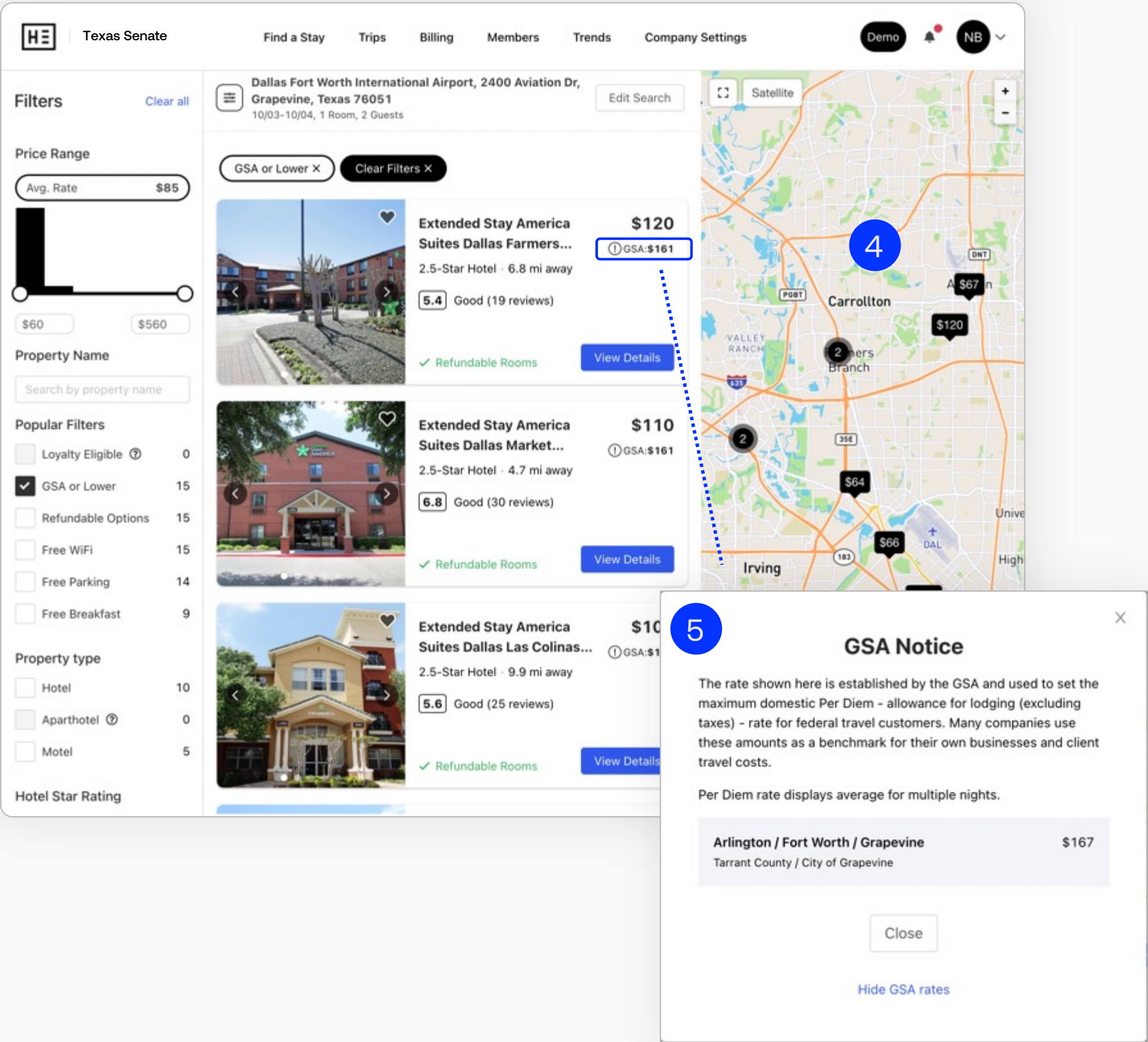
Search

4 Open map clusters

When there is a high volume of hotels available, properties are grouped together into numbered dots on the map. Each number represents how many hotels are in that area. Click on a cluster marker or zoom in to see individual property locations.

5 Compare against GSA rate

GSA maximum per diem rates will automatically have a banner around them to make them easier to find. You can also filter by hotels that are at or below the GSA nightly rate in the left-hand column of the screen. For most State of Texas agencies, you must book a hotel with a nightly rate that is at or below the listed GSA. Please note, Hotel Engine does not visualize county lines on search. You'll need to verify the county of the hotel you wish to book to ensure it's within GSA guidelines.



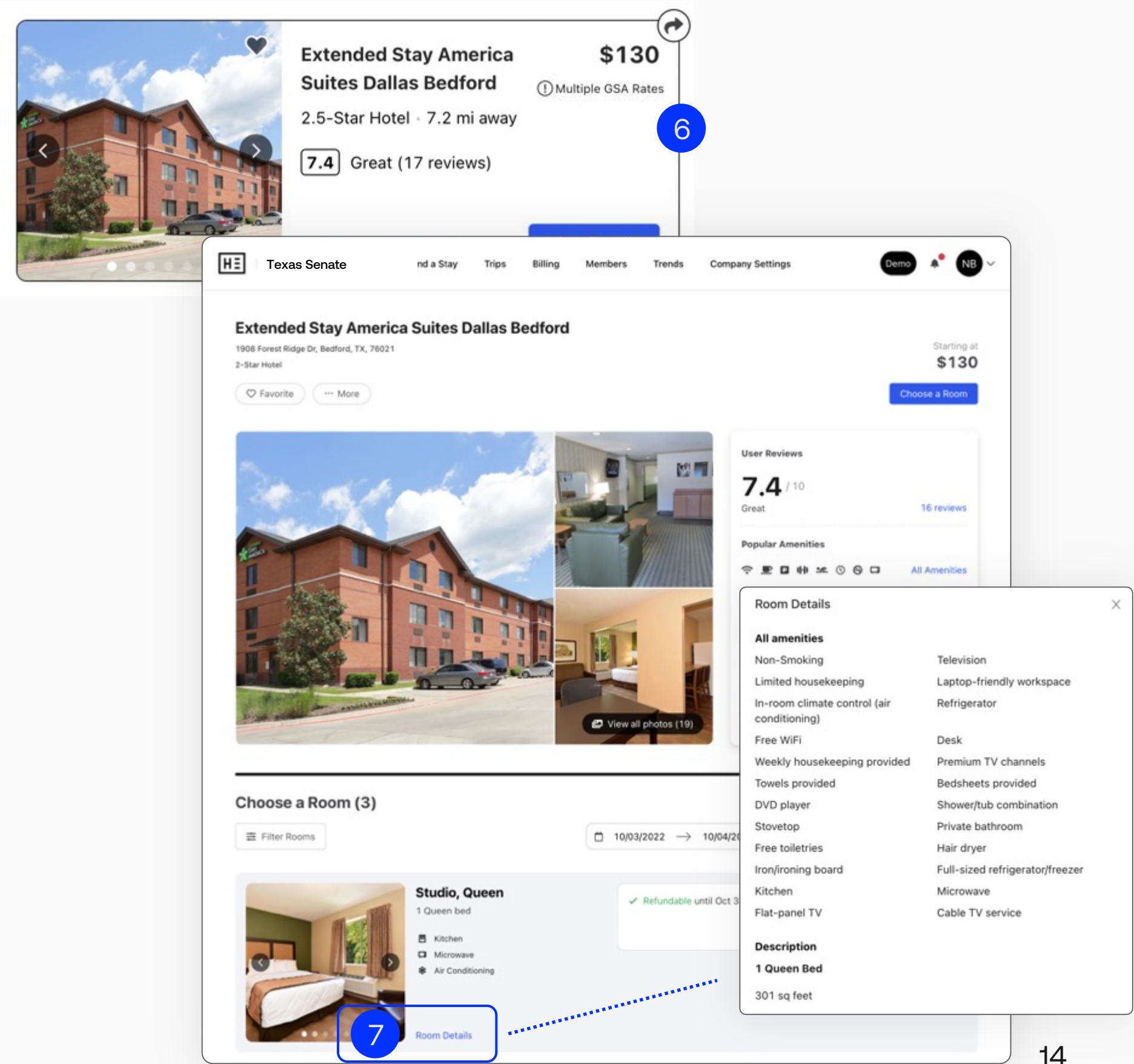
Search

⑥ 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.

⑦ View property details

Click on an individual hotel to see its included amenities, description, individual nightly rates, and available room options.



Book a hotel

1 Primary guest info

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

2 Payment

You must have a credit card on file to complete a booking for yourself or another state traveler. Select one of your saved credit cards to continue. If booking for another traveler, your card will be used to secure the booking with the hotel.

Your credit card will not be charged at the time of booking. The credit card information you have on file in the Hotel Engine platform will only be sent to hotels to secure your booking. You will always be required provide a method of payment for your reservation at the hotel upon check-in.

The screenshot displays the Hotel Engine booking interface for the Texas Senate. The top navigation bar includes the HE logo, 'Texas Senate', and links for 'Find a Stay', 'Trips', 'Billing', 'Members', 'Trends', and 'Company Settings'. A 'Demo' button and a user profile icon (NB) are also present.

The main content area is titled 'Book Now' with a subtext 'Secure your stay in less than 2 minutes!'. It is divided into several sections:

- Hotel Selection:** A card for 'Best Western Plus DFW Airport Suites' in Irving, TX, US, with a 'Refundable before 4:00pm CDT on Oct 3, 2022' badge.
- Room 1:** A section for selecting a room. It shows 'Primary Guest' as 'NB Neha Bhakta (you) demo.neha.bhakta@hotelengine.com' with a 'Change Guest' link. Below it is an 'Additional Guest' section with a note: 'You can include up to 1 additional guest for this room'.
- Trip Information:** A section for entering trip details. It includes a 'Project Code' field, a 'Trip Name' field, and a checkbox for 'Is this trip billable?'.
- Payment Method:** A section for selecting a payment method. It shows 'Michael Thomas ending in 5455' with a 'Change Payment' link. Below it is an 'Add Payment Method' link.

A sidebar on the right contains the following information:

- Booking Details:** Room: Suite, Guests: 2, Dates: 10/03/2022 - 10/04/2022, Nights: 1. An 'Edit' link is provided.
- Pricing Details:** 1 room, 1 night @ \$119.99, Taxes & Fees: @ \$18.00.
- Room Total:** \$137.99.
- Complete Booking:** A blue button to finalize the booking.
- Disclaimer:** A note stating that by completing the booking, the user acknowledges they have read and accept the terms & conditions, privacy policy, and cancellation policy.

A 'Chat with us' button is located at the bottom right of the interface.

Book a hotel

- 3

Tax-exempt dropdown

Select the correct tax-exemption status for the booking. The default for this option is NO so make sure to change it to YES for every tax-exempt employee.
- 4

Taxes & fees

Please note taxes & fees will always appear on this summary. Taxes are waived for exempt employees by the hotel at check-in. This amount will be removed once the primary guest submits a tax-exemption certificate and pays for the booking at the hotel.
- 5

Summary

View the individual nightly rate breakout along with a summary of the booking’s number of rooms, number of guests, room type, and all fees associated with the booking. Review all of your selections before you click “Complete Booking.”

HE

Texas Senate

Find a Stay

Trips

Billing

Members

Trends

Company Settings

Demo

NB

Book Now

Secure your stay in less than 2 minutes!

Best Western Plus DFW Airport Suites

Irving, TX, US

\$

Refundable before 4:00pm CDT on Oct 3, 2022

Room 1

Primary Guest

NB

Neha Bhakta (you)

demo.neha.bhakta@hotelengine.com

Change Guest

+ Additional Guest

You can include up to 1 additional guest for this room.

Trip Information

Tax Exempt Stay:

1

Select Tax Exempt Stay

☐

Is this trip billable?

Booking Details

Edit

Room:

Suite

Guests:

2

Dates:

10/03/2022 - 10/04/2022

Nights:

1

Pricing Details

1 room, 1 night

\$119.99

Taxes & Fees

\$18.00

Room Total:

\$137.99

Complete Booking

By choosing to complete this booking I acknowledge I have read and accept the [terms & conditions](#), [privacy policy](#), and [cancellation policy](#).

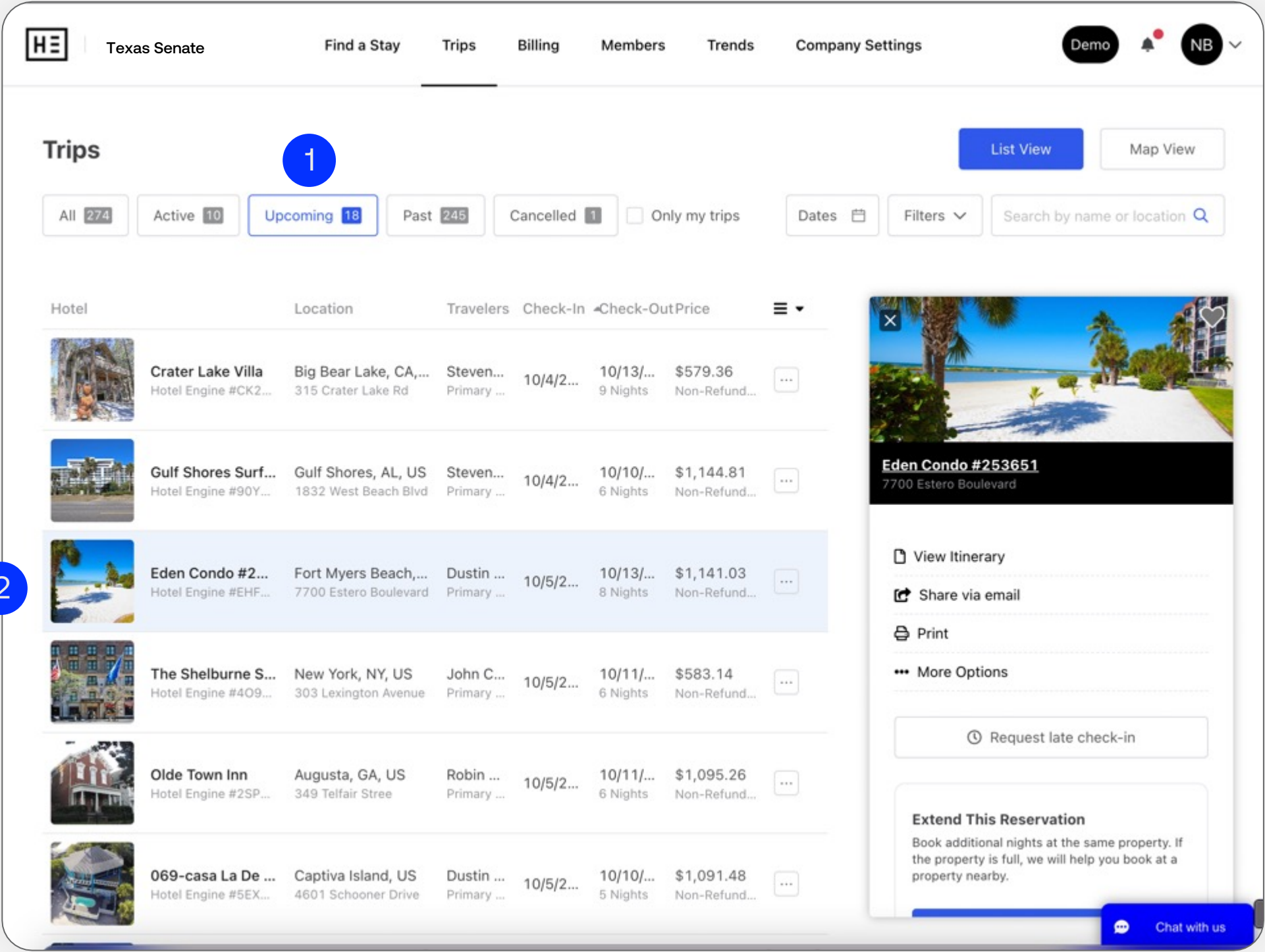
Trips

1 Trip sorting

Advanced trip filters allow you to sort by active, upcoming, and past trips, as well as by location, traveler, and hotel. As an administrator, you can also filter to find “Only my trips” to sort down to your individual travel.

2 Reservations

View upcoming travel for all your company’s employees under the “Trips” tab. Select individual trips on the interactive map or within the list to expand its details.



Trips

IMPORTANT: All cancellations must be submitted through Hotel Engine.
Never contact the hotel directly to cancel a booking.

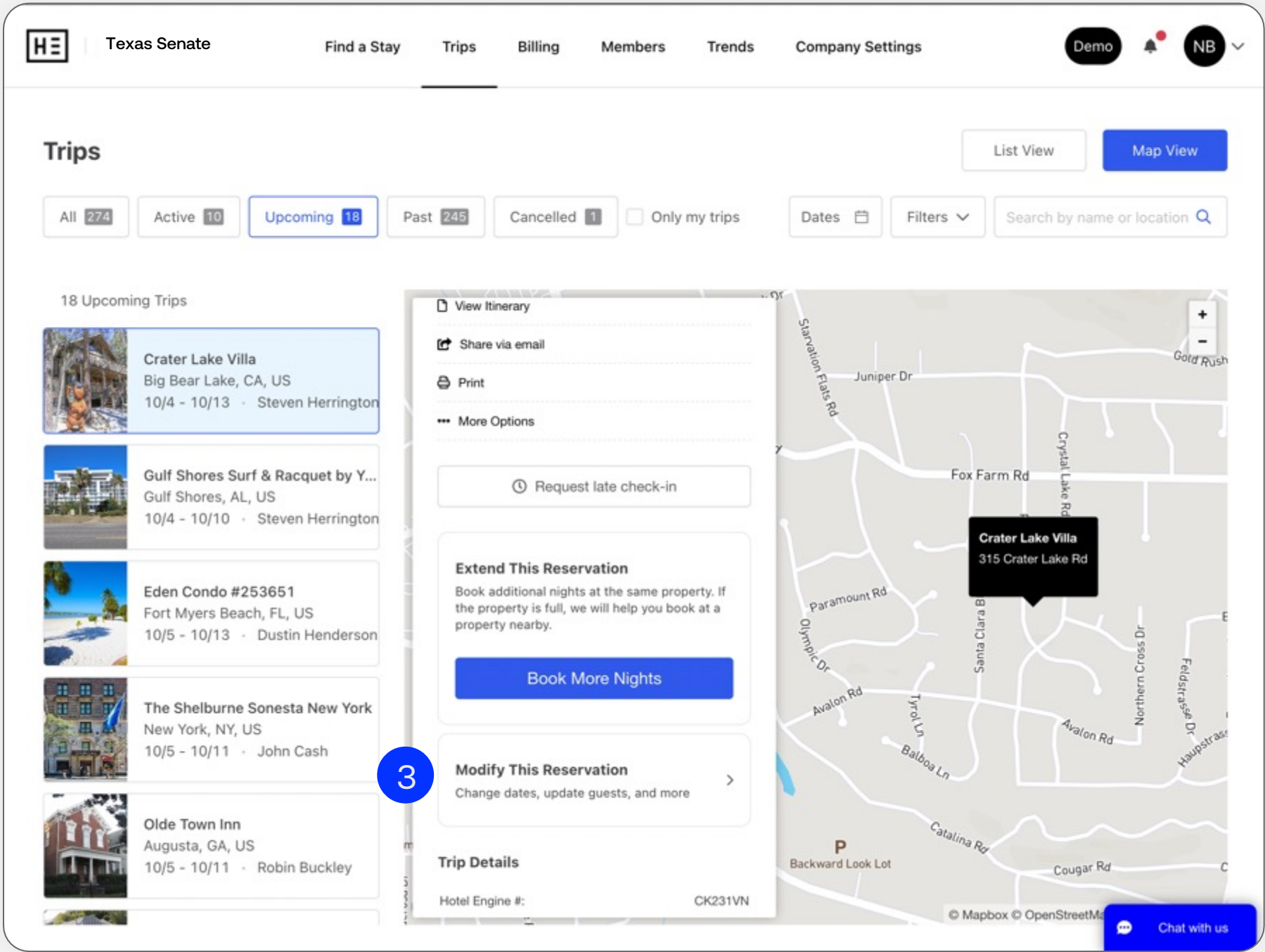
③ Modify / cancel reservations

1. Click on the “Trips” tab.
2. Select the booking you want to cancel.
3. Click “Modify This Reservation” and confirm the request in the popup window.
4. You’ll receive an email confirmation once it’s completed.

Cancel over the phone

View upcoming travel for all your company’s employees under the “Trips” tab. Select individual trips on the interactive map or within the list to expand its details.

Note: For same day cancellations, please let the Hotel Engine team know ASAP by calling our member support team. Hotels will likely not provide refunds on same day cancellations.



Modify reservation

1

Trip itinerary

Go to your Trip Itinerary by clicking on the "View Itinerary" under the "Trips" tab, then click on the "Modify Reservation" button.

2

Request trip modification

You can either:

- Change "Guest Information"
- Change "Reservation Dates"

3

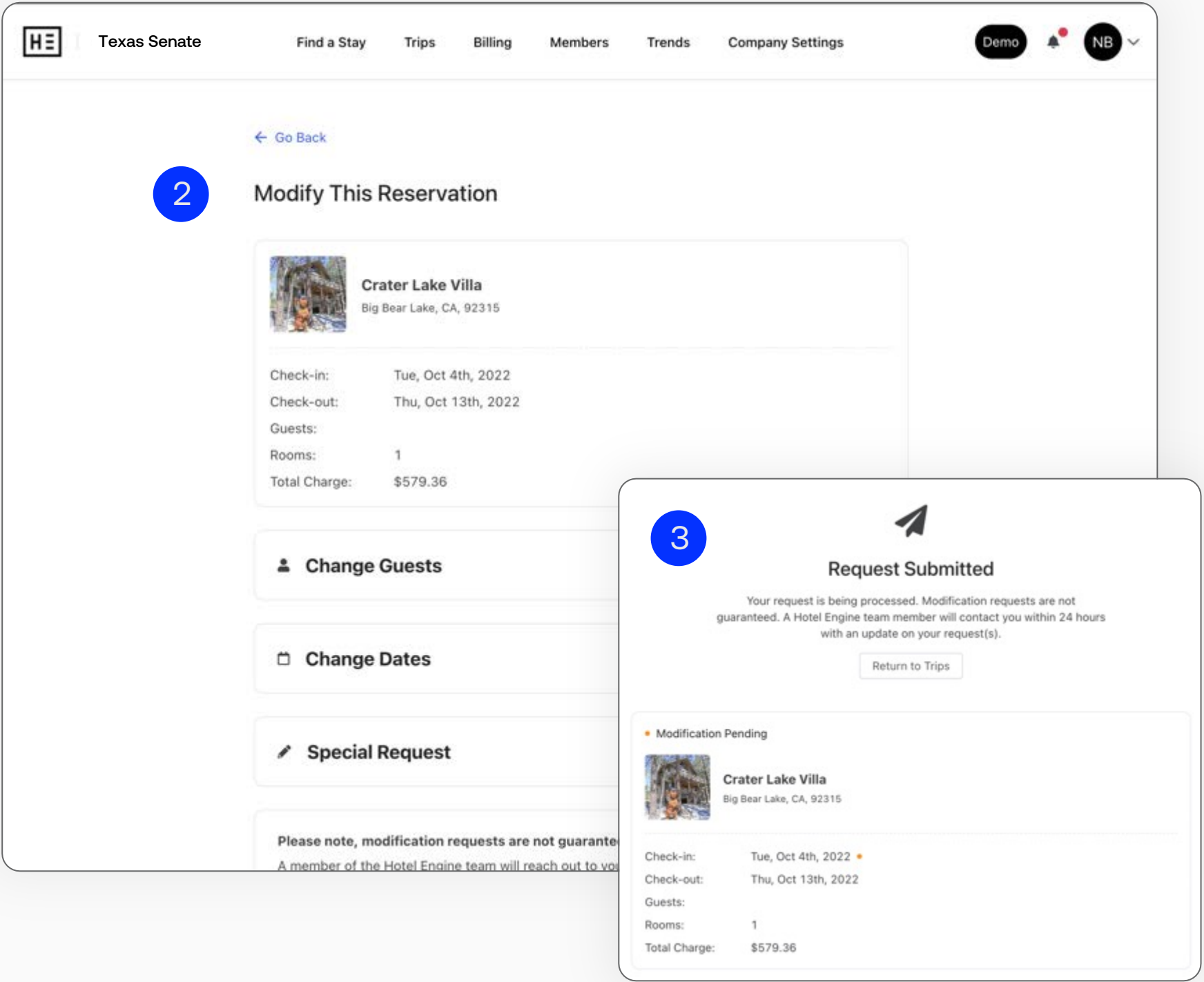
Confirmation

Our Member Experience team will then reach out to you to confirm your modifications or let you know of any other pending issues or changes to your request(s).

4

Trip updated

The modification(s) will then be updated in your trip itinerary, under the "Trips" tab.



Billing

1

Set up Direct Bill

Ask your Hotel Engine representative for a credit application today.

Billing options

You will have the choice for two billings options:

- Direct Bill on check-out date
- Direct Bill based on nights consumed

Please select which option you prefer on your credit application:

Direct Bill based on check-out date

Customer will be billed/invoiced for completed stays/reservations that have a check-out date in the current billing period. Note that one stay will only appear on one bill/invoice. That invoice will contain charges for all nights in the stay, regardless of whether some or all of those nights actually occurred within a previous billing period.

HOTEL ENGINE Direct Bill Application



APPLICANT INFORMATION

Company Legal Entity Name:

Company Address:

City:

State:

Zip:

Tax ID:

DUNS:

APPLICATION CONTACT INFORMATION

Name:

Title:

Email:

Phone Number:

CREDIT INFORMATION

Requested Credit Limit**:

Annual Hotel Spend:

Current Hotel Booking Platform:

Requested Invoice Terms (select one): Weekly

Biweekly

Monthly

Requested Net Due Terms (select one): Net 7 Days

Net 15 Days

Net 30 days

** Certain requests may require additional financial documents.

Billing

Approval

Once your credit application is approved, you can:

② **View monthly statements**

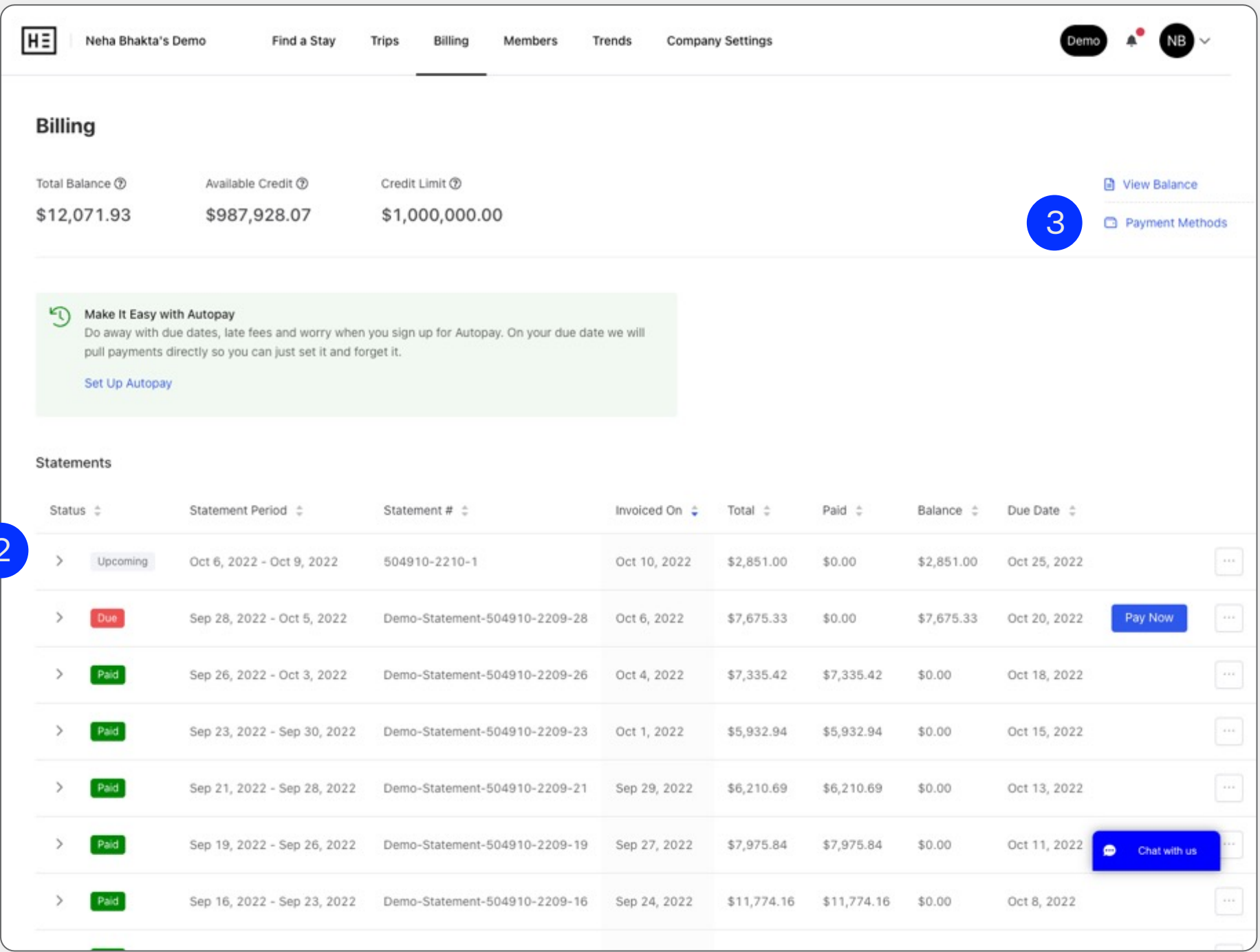
Direct Bill makes it convenient to view all your company’s hotel expenses, across all travelers, in one consolidated, monthly statement.

③ **Choose a payment method**

You can pay via check, credit card, or ACH payment. Click “Payment Methods” and then “Add a New Card” to add a credit card for Direct Bill.

What is Direct Bill?

Our monthly invoicing program establishes a direct line of credit between our users and Hotel 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.



Billing

3 Filter expenses

We make it easy to organize your company’s hotel expenses. Sort by traveler, hotel, date, price, or any of your custom fields to group expenses together.

4 Download folios & invoices

Accessing your folios and invoices is as simple as a simple click. Within your monthly statement, select folio or invoice and a PDF will automatically download for your records.

Make It Easy with Autopay

Do away with due dates, late fees and worry when you sign up for Autopay. On your due date we will pull payments directly so you can just set it and forget it.

Set Up Autopay

Statements

Status	Statement Period	Statement #	Invoiced On	Total	Paid	Balance	Due Date	
> Paid	May 2, 2022 - May 9, 2022	Demo-Statement-504910-2205-02	May 10, 2022	\$1,647.99	\$1,647.99	\$0.00	May 24, 2022	...
> Paid	May 9, 2022 - May 16, 2022	Demo-Statement-504910-2205-09	May 17, 2022	\$2,122.23	\$2,122.23	\$0.00	May	View Statement Export Statement PDF Export Statement CSV Download All Invoices
> Paid	May 16, 2022 - May 23, 2022	Demo-Statement-504910-2205-16	May 24, 2022	\$2,183.18	\$2,183.18	\$0.00	Jun	
> Paid	May 23, 2022 - May 30, 2022	Demo-Statement-504910-2205-23	May 31, 2022	\$2,936.84	\$2,936.84	\$0.00	Jun 14, 2022	...
> Paid	May 30, 2022 - Jun 6, 2022	Demo-Statement-504910-2205-30	Jun 7, 2022	\$2,335.52	\$2,335.52	\$0.00	Jun 21, 2022	...
> Paid	Jun 6, 2022 - Jun 13, 2022	Demo-Statement-504910-2206-06	Jun 14, 2022	\$3,730.93	\$3,730.93	\$0.00	Jun 28, 2022	...
> Paid	Jun 13, 2022 - Jun 20, 2022	Demo-Statement-504910-2206-13	Jun 21, 2022	\$3,342.12	\$3,342.12	\$0.00	Jul 5, 2022	...
> Paid	Jun 20, 2022 - Jun 27, 2022	Demo-Statement-504910-2206-20	Jun 28, 2022	\$3,018.28	\$3,018.28	\$0.00	Jul 12, 2022	...
> Paid	Jun 27, 2022 - Jul 4, 2022	Demo-Statement-504910-2206-27	Jul 5, 2022	\$3,021.91	\$3,021.91	\$0.00	Jul 19, 2022	...
> Paid	Jul 4, 2022 - Jul 11, 2022	Demo-Statement-504910-2207-04	Jul 12, 2022	\$2,322.70	\$2,322.70	\$0.00	Jul 26, 2022	Chat with us

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Direct Bill approvals

3 Approval status

On the “Trips” page, any reservation made by one of your Users with Direct Bill will be automatically labeled as “Pending” under “Status.” This means it still needs to be approved.

4 Bookings paid by credit card do not require approval and carry a N/A status.

5 Once an Admin approves a Direct Bill reservation, its status will change to “Approved.”

**Make It Easy with Autopay**
Do away with due dates, late fees and worry when you sign up for Autopay. On your due date we will pull payments directly so you can just set it and forget it.
[Set Up Autopay](#)

Status	Statement Period	Statement #	Invoiced On	Total	Paid	Balance	Due Date	
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> Paid	May 9, 2022 - May 16, 2022	Demo-Statement-504910-2205-09	May 17, 2022	\$2,122.23	\$2,122.23	\$0.00	May	View Statement Export Statement PDF Export Statement CSV Download All Invoices
> Paid	May 16, 2022 - May 23, 2022	Demo-Statement-504910-2205-16	May 24, 2022	\$2,183.18	\$2,183.18	\$0.00	Jun	
> Paid	May 23, 2022 - May 30, 2022	Demo-Statement-504910-2205-23	May 31, 2022	\$2,936.84	\$2,936.84	\$0.00	Jun 14, 2022	...
> Paid	May 30, 2022 - Jun 6, 2022	Demo-Statement-504910-2205-30	Jun 7, 2022	\$2,335.52	\$2,335.52	\$0.00	Jun 21, 2022	...
> Paid	Jun 6, 2022 - Jun 13, 2022	Demo-Statement-504910-2206-06	Jun 14, 2022	\$3,730.93	\$3,730.93	\$0.00	Jun 28, 2022	...
> Paid	Jun 13, 2022 - Jun 20, 2022	Demo-Statement-504910-2206-13	Jun 21, 2022	\$3,342.12	\$3,342.12	\$0.00	Jul 5, 2022	...
> Paid	Jun 20, 2022 - Jun 27, 2022	Demo-Statement-504910-2206-20	Jun 28, 2022	\$3,018.28	\$3,018.28	\$0.00	Jul 12, 2022	...
> Paid	Jun 27, 2022 - Jul 4, 2022	Demo-Statement-504910-2206-27	Jul 5, 2022	\$3,021.91	\$3,021.91	\$0.00	Jul 19, 2022	...
> Paid	Jul 4, 2022 - Jul 11, 2022	Demo-Statement-504910-2207-04	Jul 12, 2022	\$2,322.70	\$2,322.70	\$0.00	Jul 26, 2022	...

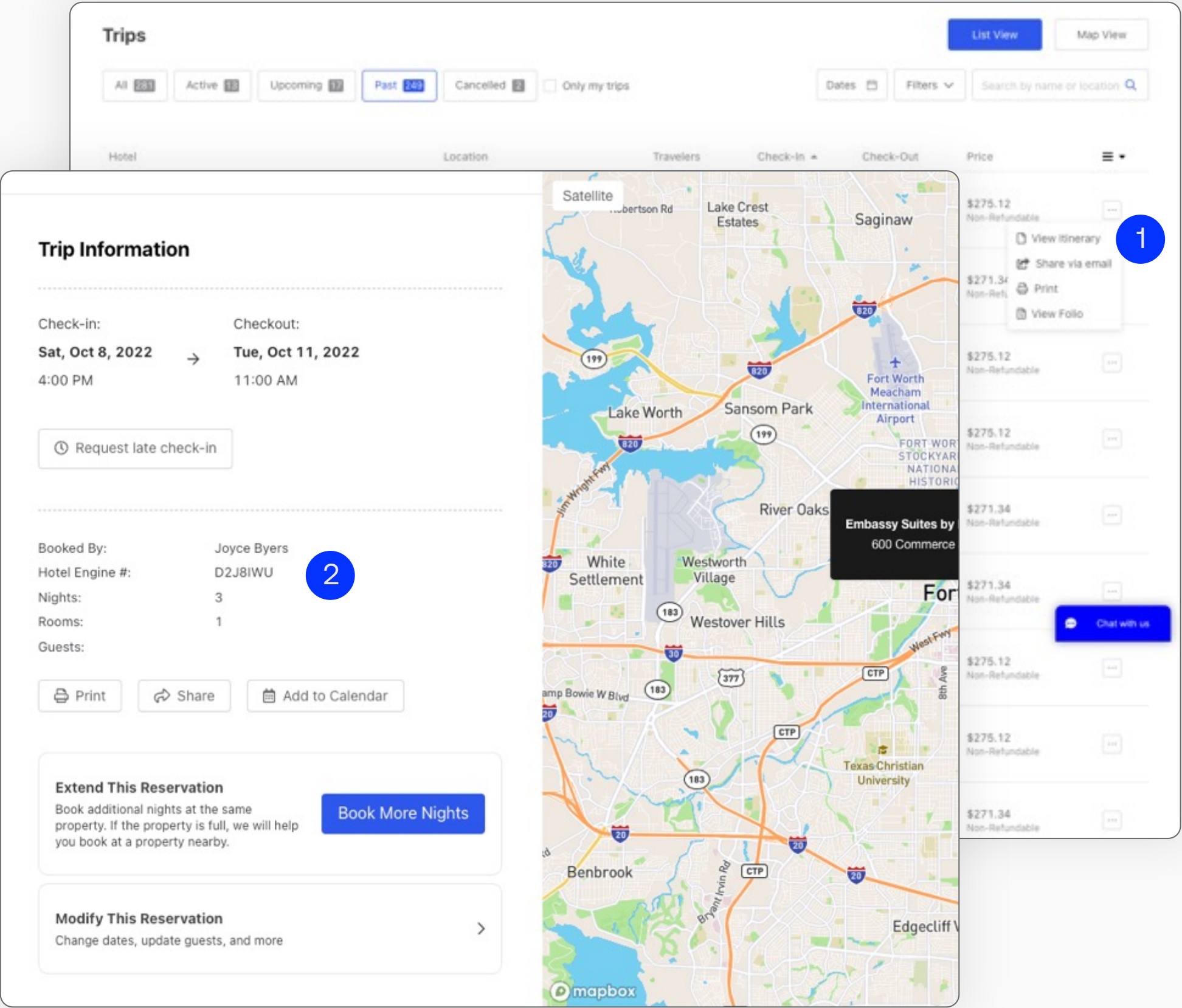
1-10 of 42 statements < 1 2 3 4 5 > 10 / page

Chat with us

Direct Bill approvals

How to review & approve

- 1 Open the reservation and click the blue “View Itinerary” button.
- 2 On the itinerary page, you can review the trip information to check that the Direct Bill verification code matches the Travel Requisition ID assigned to the User.
- 3 If everything looks good, click “Verify” at the top of the page. This will open a success message and the status of the trip will change to “Approved.”
- 4 If the trip is unauthorized or inaccurate, you can click the red “Cancel Reservation” button.
(The User will receive a cancellation email).



Important reminders

Please make sure to enter a credit card and store it on your account to secure a booking. Remember this card will not be charged at the time of booking and the primary guest will pay at the hotel (see Page 4).

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 qualify for full reimbursement (see Page 11). 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.

Please make sure you select YES under “Tax-Exempt Stay?” when booking hotels for guests that are tax-exempt. This will need to happen with every booking because the default setting is NO (see Page 10).

Tax-Exempt stays cannot apply to bookings paid with Direct Bill.



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@hotelengine.com

Live chat on

[Hotelengine.com](https://www.hotelengine.com)