

Setup Yield Profile

The first step is to create a Yield Profile in which you set occupancy and/or time rules to automatically adjust rates. There is no limit to the number of Yield Profiles you can set up and the Yield Profiles can overlap. However, it is important to note the Yield adjustments calculations are cumulative and need to be planned accordingly to achieve the desired rate. If you are creating multiple Yield Profiles, read Note below.

After the 'Yield Profile' has been built, then add the Rate Plans that you want the Yield Profile to apply to.

There are four combinations of occupancy and date range settings to choose from:

- [Occupancy Only](#)
- [Time Only](#)
- [Occupancy and Time](#)
- [Occupancy or Time \(deprecated 2023, replaced with Yield Sheets in January 2024\)](#)



Multiple Yield Profiles

Therefore, if you are creating multiple Yield Profiles that overlap, then enter the correct percentage adjustment.

For example, if you create one Yield Profile: If more than 30 Days in Advance, reduce rate by 10%. Then, another Yield Profile: If 60 Days in advance, reduce Rate by 15%..

- The first Yield Profile would have: If more than 30 Days, then -10% adjustment.
- The second Yield Profile would have, if more than 60 Days, then -5% adjustment.

The -10% is taken if more than 30 Days and the -5% after 60 Days for a cumulative discount of -15% if booked more than 60 Days in advance.

Another example utilizing multiple rules is as follows. When you have three rules, when it hits a specific rule, the Yield will apply.

That said the rules are stacked, or cumulative, in the sense that if occupancy falls within two rules, both will apply.

In this example below there are three rules.

- Occupancy Below 80% (Occupancy Only) – Adjust: -10%
- Occupancy Below 50% (Occupancy Only) – Adjust: -30%
- Occupancy Below 25% (Occupancy Only) – Adjust: -45%

On a specific date, the occupancy is at 64%. As 64% is below 80 rule applies (as this is over 50), the 10% discount is what is yielded.

When you move to another date, the occupancy is 45%. As this is below 50% AND below 80%, both your rules apply. Therefore, you see is -40% factor which is the 30% + 10%.

If you look at another date, where the occupancy is at 19%. As this is below 25%, 50% AND below 80%, all three rules apply. Therefore, you see is -85% factor which is the 30% + 10% + 45%.

Yield Management

To Add a Yield Profile, follow these steps:

- Go to **SETUP | RATES | YIELD MANAGEMENT**
- Click **Add** at the bottom right.

Front DeskBookingsRatesRelationshipsOwnersParametersSettingsPMSFeatures/Images

Rate GridManage RatesDefault RatesPackagesRoom TypesRoomsYield ManagementYield Grid

Find records where Occupancy or Days hasSort by DescupDisplay 200RecordsFetch

Desc	Type	Occupancy or Days	Threshold	Days Left	than	Adjustment	Adjustment Type
Occupancy Below 70%	Occupancy Only	Below	70	Less	7	-10	Percentage
Occ<80% >15Days	Occupancy or Time	Below	80	Less	15	-10	Percentage
Below 70% and 29 day	Occupancy and Time	Below	70	Less	29	-15	Fiat Amount
20% discount 60 days	Time Only	Below	50	More	60	-20	Percentage
10% 30 days	Time Only	Below	50	More	30	-10	Percentage

5 records found

Add

- A new Yield Profile will open.

There are four combinations of occupancy and date range settings to choose from:

- [Occupancy Only](#)
- [Time Only](#)
- [Occupancy and Time](#)
- [Occupancy or Time \(deprecated 2023, replaced with Yield Sheets in January 2024\)](#)

In the example below, the yield profile is using both Occupancy and Time rules. The Yield Profile description of "15% 30 Day below 50%" means that the rate will adjust by -15% if the booking is more than 30 Days in Advance OR Occupancy falls below 50%.

Front Desk Bookings **Rates** Relationships Owners Parameters Settings PMS Features/Images

Rate Grid Manage Rates Default Rates Packages Room Types Rooms **Yield Management** Yield Grid

Description: 15% 30 day below 50%

Type: ■ Occupancy or Time

Occupancy: Below Threshold: 50

Days Left: More than: 30

Adjustment: -15

Notes: Adjust rate by -15% if booked more than 30 days in advance OR occupancy is below 50%

Last Changed:

Save

Add Rate Plans to Yield Profile

Add the Rates that you want to apply the Yield Profile. A Rate can have multiple Yield Profiles applied

- To add a Rate Plan to the Yield Profile, **click on the "Desc"** to open the Profile screen.

Front Desk Bookings **Rates** Relationships Owners Parameters Settings PMS Features/Images

Rate Grid Manage Rates Default Rates Packages Room Types Rooms **Yield Management** Yield Grid

Find records where Occupancy or Days has Sort by Desc up Display 200 Records **Fetch**

Desc	Type	Occupancy or Days	Threshold	Days Left	than	Adjustment	Adjustment Type
Occupancy Below 70%	Occupancy Only	Below	70	Less	7	-10	Percentage
Occ<80% >15Days	Occupancy or Time	Below	80	Less	15	-10	Percentage
Below 70% and 29 day	Occupancy and Time	Below	70	Less	29	-15	Flat Amount
20% discount 60 days	Time Only	Below	50	More	60	-20	Percentage
10% 30 days	Time Only	Below	50	More	30	-10	Percentage

5 records found

Add

- Click **Add Rate** to add one specific Rate. Or, click **Add All Rates** to add all of your rates to the Yield Profile.

Front Desk Bookings **Rates** Relationships Owners Parameters Settings PMS Features/Images

Rate Grid Manage Rates Default Rates Packages Room Types Rooms **Yield Management** Yield Grid

Description: Over 20%
 Type: Occupancy Only
 Occupancy: Below Threshold: 70.00%
 Adjustment Type: Percentage Adjustment: 10
 Notes:
 Last Changed: 16-JUN-2016 15:11:02

Delete Edit

Add Rate Add All Rates

Find records where ID has Sort by ID up Display 200 Records Fetch

ID	Description	Action
0 records found		

Click image to enlarge

- If you click Add Rate, then a screen will open with a field to select the Rate. Click on the magnifying glass icon to expand the drop down list of your rates.
- Select the Rate and click Save.

Front Desk Bookings Rates Relationships Owners Parameters Settings PMS Features/Images

Late Availability: Occupancy Below 70%

Rate or Package ID:

1NTSPECIAL	1 Night Special
SUITE	2 Bedroom Suite rate
ESDECO2P	2P PACKAGE: EAT, SLEEP AND DIVE
2SUITE	2SUITE rate
EDSECO3P	3P PACKAGE: EAT, SLEEP AND DIVE
AAA	AAA rate
AUG	August Special Package
BEDBREAK	Bed and Breakfast
CORPCONF	CORP

Click image to enlarge

You will then see the Rate in the list of the Yield Profile.

- To remove the rate for the Yield Profile, click Delete next to the Rate.
- To add another rate to the Yield Profile, select Add Rate

Front Desk

Bookings

Rates

Relationships

Owners

Parameters

Settings

PMS

Features/Images

Rate Grid

Manage Rates

Default Rates

Packages

Room Types

Rooms

Yield Management

Yield Grid

Description:

Occupancy Below 70%

Type:

Occupancy Only

Occupancy:

Below

Threshold:

70.00%

Adjustment Type:

Percentage

Adjustment:

-10

Notes:

If Occupancy is below 70%, then reduce rates by 10%

Last Changed:

07-JUL-2016 12:04:21

Delete

Edit

Add Rate

Add All Rates

Find records where

ID

has

Sort by

ID

up

Display

200

Records

Fetch

ID	Description	Action
SUITE	2 Bedroom Suite rate	Delete

1 records found

Click image to enlarge

Yield Grid

Finally, in order to easily view how Yielded rates are affecting your Agent Channels, we have a 'Yield Grid' that allows you to see how rates are being set, per Agent Channel, based on a calendar view. This tool, when set next to the 'normal' Rate Grid, visually shows how rates are being affected to each Agent Channel. Note that the example below assumes that the Agent Channel has a 'Rate Loading' set in addition to the Yield, making the Rate first 'loaded' by 11% and then 'yielded' by the amount set in the Yield Profile.. Thus there are two modifying calculations being applied to the rate via this Agent Channel. See [Yield Grid](#)