TOURPLAN

Operations User Manual

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Tourplan resources are regularly updated in parallel with the most recent Tourplan software release. It is possible that the documentation you read may not match the version you are currently using.

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CHAPTER 1

Getting Started with Operations

This document details the setting up and use of Tourplan NX Operations applications - Bulk Documentation, Booking Operations and Resource Assignments.

NOTE: Not all companies will need to use all of these functions. They are grouped under the generic 'Operations' application because they are stand-alone utilities with specialist uses. All operations utilities have selection screen(s) which allow criteria to be entered to select bookings or services to allow multiple results to be returned.

Bulk documentation provides users with the option of sending multiple messages at one time from a range of bookings. Tourplan NX has the option to bulk send Supplier messages and Agent messages or run Vouchers in bulk.

Booking Operations allows users to recalculate bookings, services or PCM quotes applying the recalculation to multiple bookings instead of one by one within individual bookings. Substitute services can be applied to bookings to replace a service in bulk. If companies are using Tourplan NX Group Booking - Book On functions the Booking Operations application is where users will select bookings associated with specific packages. Booking Operations is also where an iCom activity report can be obtained if the user's company is using iCom/WebConnect.

Resource Assignment Operations is where resources such as drivers, guide or vehicles can be reserved or assigned if the user's company has its own fleet of vehicles.

In this chapter ...

Tourplan NX basic setup will have been completed for you during system installation the basic setup gets the system up an running - training will provide you with the tools to make your Tourplan System unique to your organisation requirements. Any amendment to INI Settings should not be done without consultation from your Tourplan system administrator.

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About the User Manuals

The user manuals for Tourplan NX are a set of manuals, available both online and in print, that assist users to use the system.

They are designed to supplement training; not replace it. The guides can be used as reference material for queries and assistance after training has been completed.

NOTE: If reading a PDF version of our user manuals, be aware that regular, underlined links (such as those in the following table) may go to online destinations *outside* the user manual. Bold, blue links are cross-references to places *inside* the user manual (for example, those under Quick Steps).

User Manuals are available from myTourplan.

User Manual Conventions: used in the user manuals to highlight different types of information.

Convention	Icon / Style	Definition
Any field, button or screen area	*Italics* in this font	Depending on context, relates to any of the following: on-screen label, field to select, button to click or text to enter.
Menu selection, screen or form name	**Bold** in this font	Indicates expandable text, where clicking the bold text expands into more detailed text or an image. The effect is available only for online pages - printed pages show the expanded text/images under the bold text (except for obvious menu selections, which are not expanded).
Note (simple)	Example	Highlights a relevant comment or point about the section or procedure.
Note (more important)	i	Specific information to be aware of about the preceding paragraph(s). Might include further important detail in italics.
Drop-down text	▶ ▼	(Online only) Right-arrow: expand more detail about the text immediately to the right. Down-arrow: collapse detail.
Previous / Next pages		(Online only) Links that go to either the immediately previous or next pages in the navigation Table of Contents. These are different from the browser Back / Forward buttons, which go to the last page visited in either direction.
Expand / Collapse procedures		Expand procedure providing more detail and example images. Collapse detail.
Procedure	**Enter rate details**	Heading label for procedures, which are specific tasks or sets of steps to be carried out.
Breadcrumb Trail	**Menu > Sub-menu > Selection**	Indicates a menu selection path to follow, to arrive at a particular screen. For example, **Home > Bookings and Quotes > FITs**.

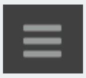
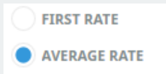
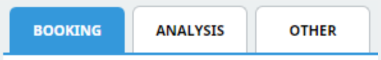
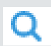
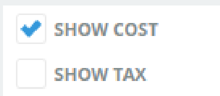
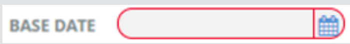
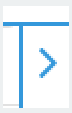
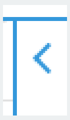
Getting Started With Tourplan NX

Tourplan NX is a software solution for tour operators and destination management companies. It is designed for multiple devices and is touch-screen capable. The user interface is fully browser based with a device and an internet connection, all users (including consultants, sales teams and managers on the move) can check or update any information in the system.

The Enterprise Edition allows users to open multiple tabs of the same application, providing the ability to have multiple bookings open at any given time. Small Business and Professional subscriptions allow single tab functionality where the user can have one tab of the same application open at a time. If the user tries to open a second tab of the same application on these subscriptions a message will display asking the user if they would like to open the application in enquiry mode which is read only.

Tourplan NX Application Conventions

Tourplan NX Application Conventions: used in Tourplan NX to describe different parts of the screen.

Convention	Icon / Style	Definition
Hamburger Menu		Menu icon used throughout Tourplan NX. Can represent different menus, depending on the application.
Check-box		Box that can be clicked (checked) to indicate true (i.e. include), or unchecked to indicate false (i.e. do not include).
Radio Button		Choice made by clicking the label or button.
Drop-down List Field		List of predefined codes/choices accessed by clicking the down arrow. Often found next to a Search button.
Tab		Overlapping area of the screen, whereby only the highlighted tab's real estate is displayed.
Search		An on-screen button with a magnifying glass icon indicates that a search for text entered into the adjacent field can be performed by clicking it.
Multi-Select List Box		List of check-boxes of which all, some or none can be selected.
Required Field		An area outlined in red on a form or screen indicates a field where data must be entered.
Side Panel Collapse	 	The side panel on some screens can be collapsed to increase the main panel width. Select the blue right arrow to collapse and the blue left arrow to expand.
Edit		An on-screen button with an edit icon indicates that users can drill down to edit/open/view/add information.

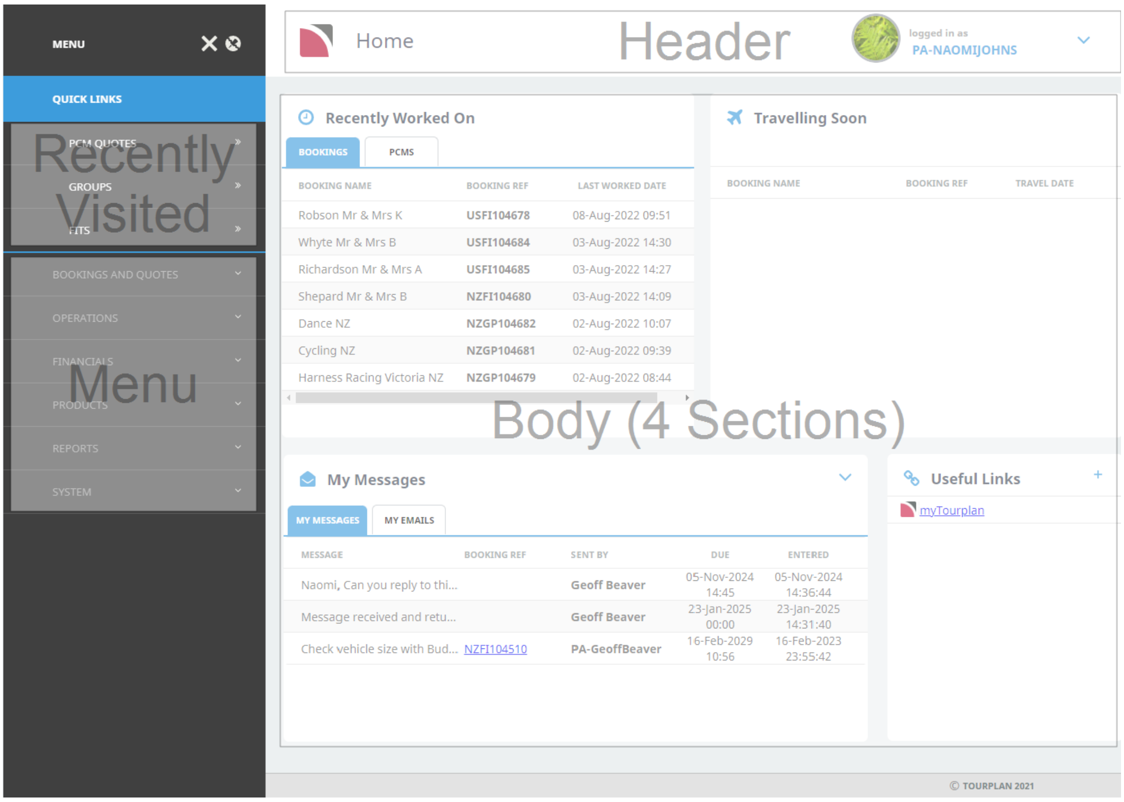
About the Landing Page

The Landing Page, also known as the Dashboard, is the very first page presented after logging-in to Tourplan-NX. It comprises four main sections, each of which contains a list of different transaction types:

- **Recently Worked On** - Bookings or PCMs.
- **Travelling Soon** - Bookings.
- **My Messages**
  - *My Messages* - Internal Messages or reminders sent between consultants.
  - *My Emails* - Imported Emails if the email import feature is enabled.
- **Useful Links** - Internal or external URLs.

There are two additional sections; the Tourplan-NX Menu at the left-hand side, which is covered in the landing page header at the top, which indicates the current menu (always **Home** for the landing page) and the currently logged-in user.

Landing Page Sections



About the Landing Page Sections

Recently Worked On

Provides consultants with a list of the last 15 bookings or PCMs that they have recently been working on. A scroll bar allows users to see extra data when hidden.

Travelling Soon

A list of bookings travelling soon for the consultant logged in. Two weeks is the default travel period the system will return bookings for. However user companies may have altered system settings to display an alternative travel period.

My Messages

My Messages - If internal messages have been sent to users, a list of those messages displays on their dashboard when they first log in.

Messages can be sent to colleagues from the dashboard or from within the applications.

NOTE: Queued Message functions are covered in more detail within the applicable user manuals.

My Emails - If the email import feature is enabled, a list of received messages displays on their dashboard when they first log in.

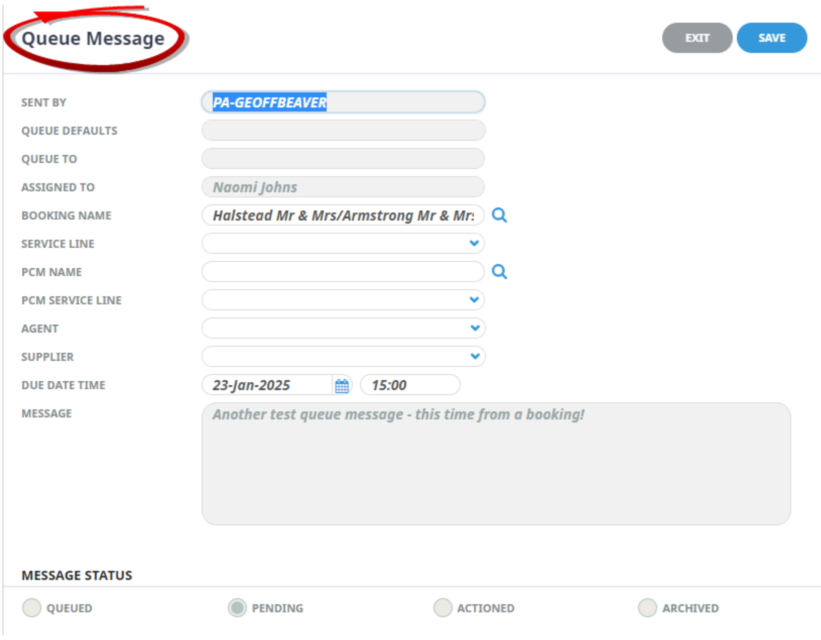
Bookings can be opened from the dashboard and the received message replied to from within the booking.

NOTE: Email Management functions are covered in more detail within the Operations user manuals.

Respond to a Message in My Messages

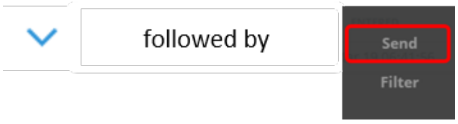
Messages can be responded to and the message status updated.

1. Click on a message under **My Messages** to open the **Queue Message** screen to read a message in full.

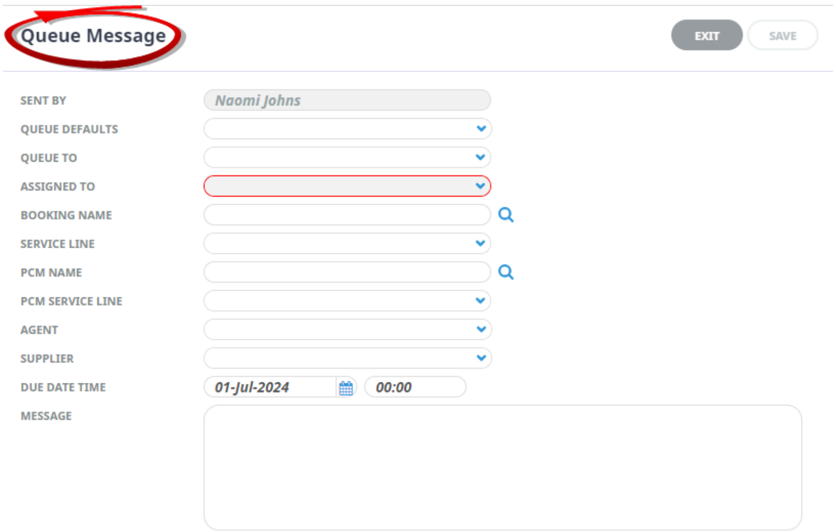


2. Modify any fields that might need updating and click **Save**.

3. To send a new message, click the blue **Drop-Down Icon** at the top right of the My Messages section and then click **Send**.

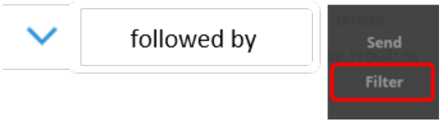


4. On the new **Queue Message** screen, assign an internal queue message to one or more colleagues. The message can identify a specific booking/PCM, Agent or Supplier for reference.

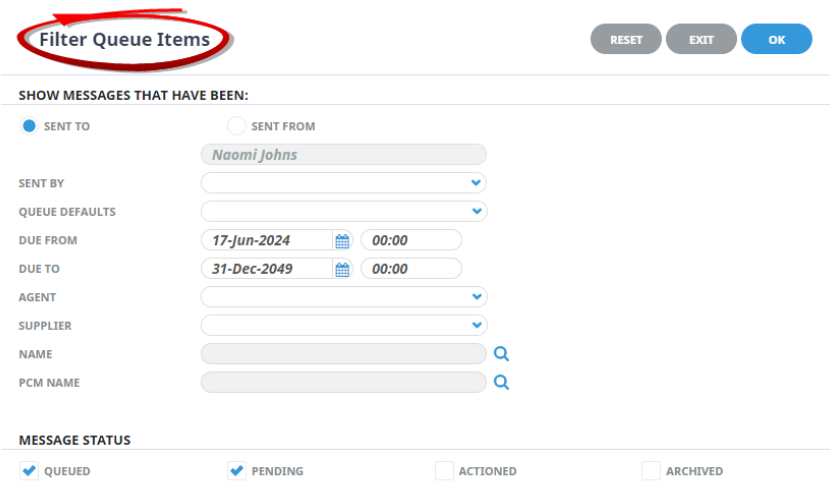


5. Click **Save** to send the message.

6. To filter messages, click the blue **Drop-Down Icon** at the top right of the My Messages section and then click **Filter**.



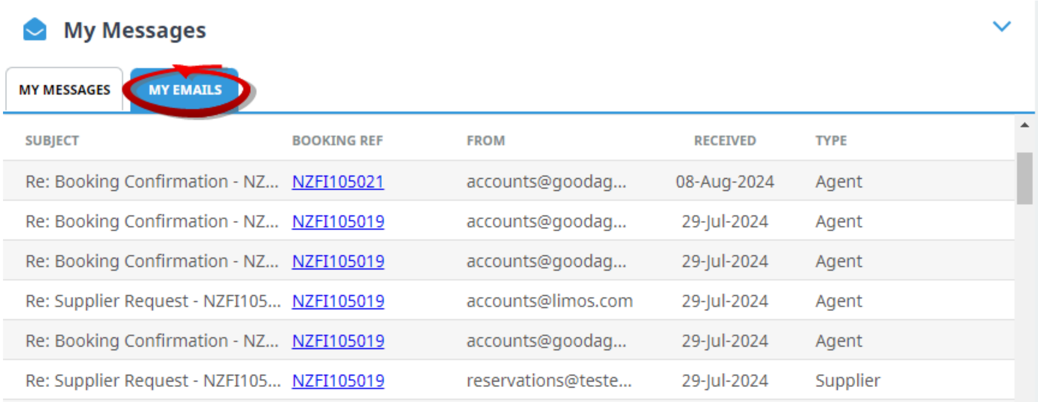
7. On the **Filter Queue Items** screen, enter filter criteria and click **OK**.



8. From the filtered list of messages returned, choose a message to view and/or respond to.

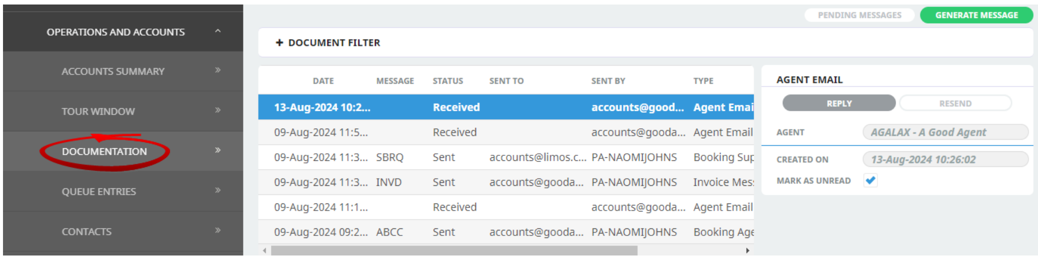
View Received Emails & Open Booking

1. Click on **My Emails** to open the Received **Email List**.



2. Click on the Booking Reference to **Open** booking.

3. The booking Dashboard will **Open** in a new browser tab, navigate to the Documentation Menu to process the email.



Useful Links

Useful links allows the insertion or amendment of useful URL links.

These are URLs that might be used on a regular basis and provide quick access from the dashboard. Tourplan allows company wide Useful Links to be created in Code Setup. Individual users can also nominate 'private' links, in other words URLs which might be unique to their requirement. This is done by either adding a link to their dashboard using the procedure below, or through Code Setup selecting a Private User type.

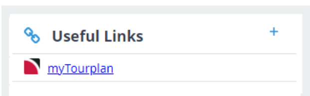
A number sequence provides the order the URL Name will display on the Dashboard.

> The URLs on a user's desktop may differ from those of another user.

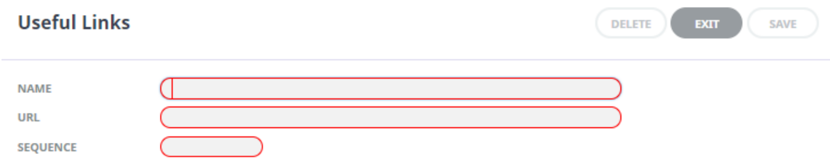
If the user no longer wants the URL to display a Useful Link can be removed from the Code Setup application. A System Administrator with access to Code Setup can change or remove a URL.

Add a Useful Link from the Dashboard

1. Click the blue **+** symbol to add useful URLs to this section:



2. Insert the **Name** of the URL, the full *URL* link, and insert a *Sequence* number.



About the Tourplan-NX Menu

The Hamburger Menu

The Tourplan NX menu is the hamburger icon at the top, left of the browser window:

Selections available from the hamburger menu can change, depending on context within the system; i.e. which application is currently running (examples of applications are Financials, FITs, Code Setup etc.).

When first logging-in to Tourplan NX, the **Home** menu displays, identified by the word "Home" up by the hamburger icon. Making a selection from any menu might go to another menu, or it might go into an application screen. For example, the task **Create a Default Currency**, requires two menu selections to arrive at the Currency screen:

1. a selection from the **Home** menu (**Home > System > Code Setup**), followed by
2. a selection from the **Code Setup** menu (**Code Setup > System > Currency**).

NOTE: In the user manuals, a series of menu selections such as the above is frequently referred to as **Home > System > Code Setup > System > Currency**.

In Tourplan-NX the full list of selections available from the Home menu is:

- Bookings and Quotes.
- Operations.
- Financials.
- Products.
- Reports.
- System.

Menu Changes with Selections

The menu can change when an item, such as a supplier or a product, is chosen in the screen. The following examples illustrate the differences.

Menu Breadcrumb Trails

NOTE: Menu breadcrumb trails are used throughout our user manuals when referring to selections made from the left-hand menu. In printable versions (e.g. PDF), only the breadcrumb trails are included - small screenshots are not shown. However, in online versions, the menu breadcrumb trails are expandable, showing both the screenshot and text for each step.

About Quick Links

Quick links are places recently visited. The more frequently a place is visited (i.e. an application), the more often a link appears to that place in the **Quick Links** list.

This page intentionally left blank to ensure new chapters start on right (odd number) pages.

CHAPTER 2

Bulk Documentation

This chapter describes the Bulk Documentation application where you can generate and send messages for a range of bookings or PCMs based on a variety of selection criteria.

The first section will show users how to send Supplier and Agent messages in bulk from bookings. This chapter also covers how to produce a bulk Voucher run for multiple bookings.

The second section will show users how to Send Supplier and Agent messages in bulk from PCMs. This is to assist organisations who work with series tours and may need to send communication to suppliers from the PCM.

Instruction on each procedure will be provided however users will determine their own company parameters within the filter tabs to select the required bookings, PCMs or services to send messages from.

In this chapter ...

Bulk Messaging Solutions

Bulk messaging is a general term where messages such as supplier and/or agent messages can be configured to send in a batch instead of sending messages one at a time from a booking.

There are a number operational solutions you can use 'Bulk Messaging' for we have listed some alternative uses:

- Some organisations choose to use bulk messaging to generate internal documentation such as Tour Booking Cost Sheets for their Tour Guides.
- Other organisations use the bulk messaging function to preform service status updates, generating a consolidated message to an email.

Bulk messaging solutions can generate messages using the filters provided and configured to save as repeat messages.

Supplier Messaging

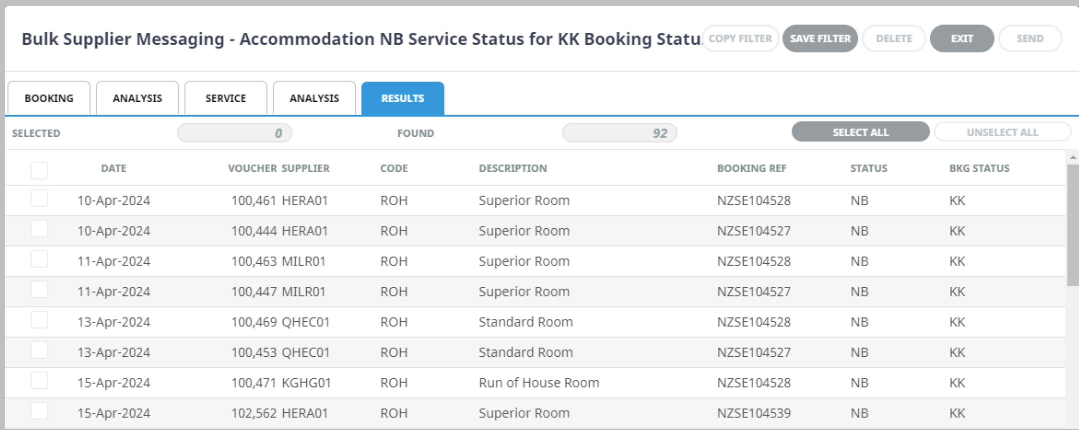
Bulk Messaging allows messages to be sent in bulk to suppliers, and messages selected can be sent from multiple bookings. Concurrently, the status of the services where messages have been sent can be updated.

NOTE: Bulk Messaging will not suit all companies. This function is typically used where supplier messaging is consolidated (either by user or company) to output at specific times or at the end of day.

The selection criteria of frequently sent messages can be saved and recalled. If saved, a list will display when the Supplier Messaging menu is selected. Frequently used filters can be copied and saved from within the Bulk Supplier Messaging screen.

For example, with this supplier message we wanted to send bulk messages for a selection of bookings that have a service status of 'NB' New Booking, and a Booking Status of 'KK' Confirmed Travelling. The system has filtered the bookings that meet the requirements of service status and booking status. Now individual selection or select all can be chosen. You will see in the screen capture that the Bulk Supplier Messaging Title is called Accommodation NB Service Status for KK Bookings. In this example we have selected an *existing* filter selection called Bulk Supplier Messaging.

NOTE: The service status and booking status used in this example may differ from your company's service status and booking status codes.

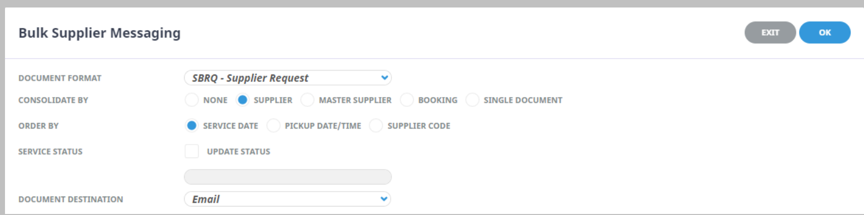

Bulk Supplier Messaging - Accommodation NB Service Status for KK Booking Statu COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS SERVICE ANALYSIS RESULTS

SELECTED 0 FOUND 92 SELECT ALL UNSELECT ALL

DATE	VOUCHER	SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS	BKG STATUS
10-Apr-2024	100,461	HERA01	ROH	Superior Room	NZSE104528	NB	KK
10-Apr-2024	100,444	HERA01	ROH	Superior Room	NZSE104527	NB	KK
11-Apr-2024	100,463	MILR01	ROH	Superior Room	NZSE104528	NB	KK
11-Apr-2024	100,447	MILR01	ROH	Superior Room	NZSE104527	NB	KK
13-Apr-2024	100,469	QHEC01	ROH	Standard Room	NZSE104528	NB	KK
13-Apr-2024	100,453	QHEC01	ROH	Standard Room	NZSE104527	NB	KK
15-Apr-2024	100,471	KGHG01	ROH	Run of House Room	NZSE104528	NB	KK
15-Apr-2024	102,562	HERA01	ROH	Superior Room	NZSE104539	NB	KK

After the user has selected the services the supplier requests are to be sent to, a document message format can be selected. Bulk supplier messages are generated and a status can be selected for the services to be updated to.



Field selections also allow the message content to be consolidated by Supplier, Master Supplier, Booking, Single Document or no consolidation.

Create Manual Supplier Messaging Filters and Send Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > Bookings > Supplier Messaging.**

2. Click **Manual.**

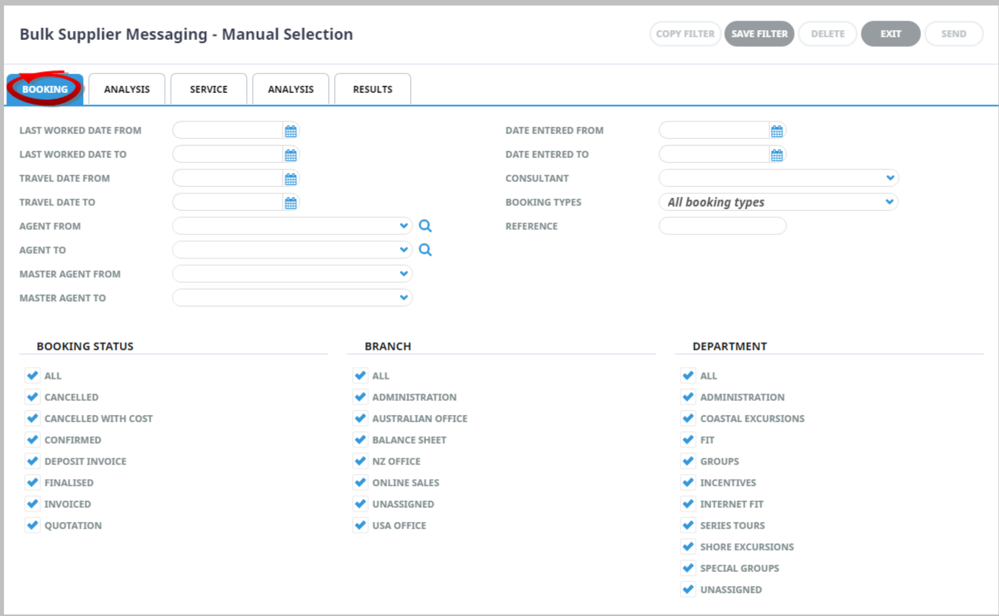
3. On the blank Bulk Supplier Messaging - Manual Selection screen, the **Bookings Tab** will open, select the required filters from the field selections available within the **Booking Tab**, **Analysis Tab (Booking and Agent)**, **Service Tab** and the **Analysis Tab (Supplier and Product)**.

   View Supplier Messaging Filter Selections to learn more about all the field selections available, or view the individual tab filters: Booking Tab, Analysis (Booking and Agent), Service, Analysis (Supplier and Product), Results.

   NOTE: There are two tabs with the heading Analysis, the Analysis Tab on the left refers to the Booking or Agent Analysis field selections, whereas the Analysis Tab on the right refers to Supplier and Service Analysis field selections.

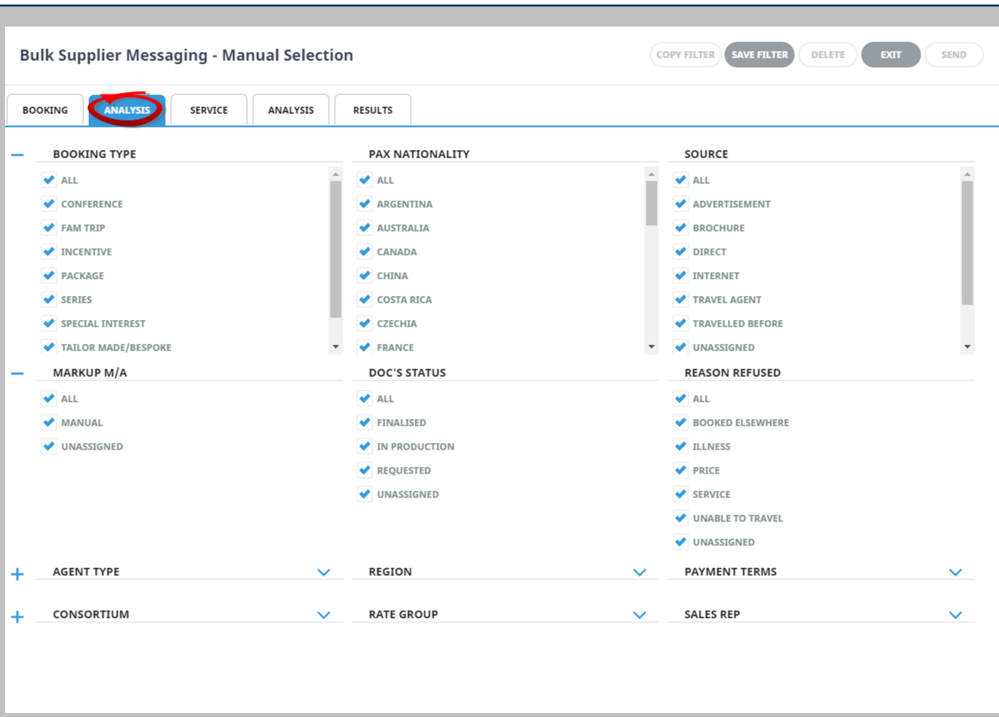
4. Check the **completed screens.**

Booking Tab

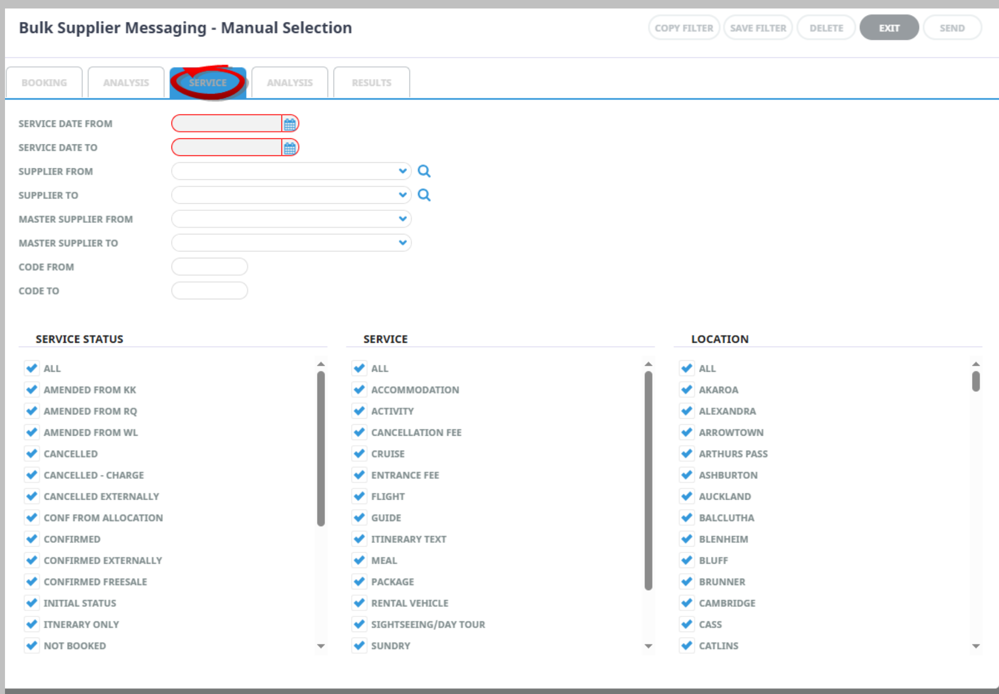


Analysis Tab (Booking and Agent Analysis)

In this example the Booking Analysis fields have been expanded using +. Where as the Agent Analysis fields have been left minimised. Your company's Analysis Fields and codes will be different to those shown in this User Manual and will reflect your organisations analysis requirements.

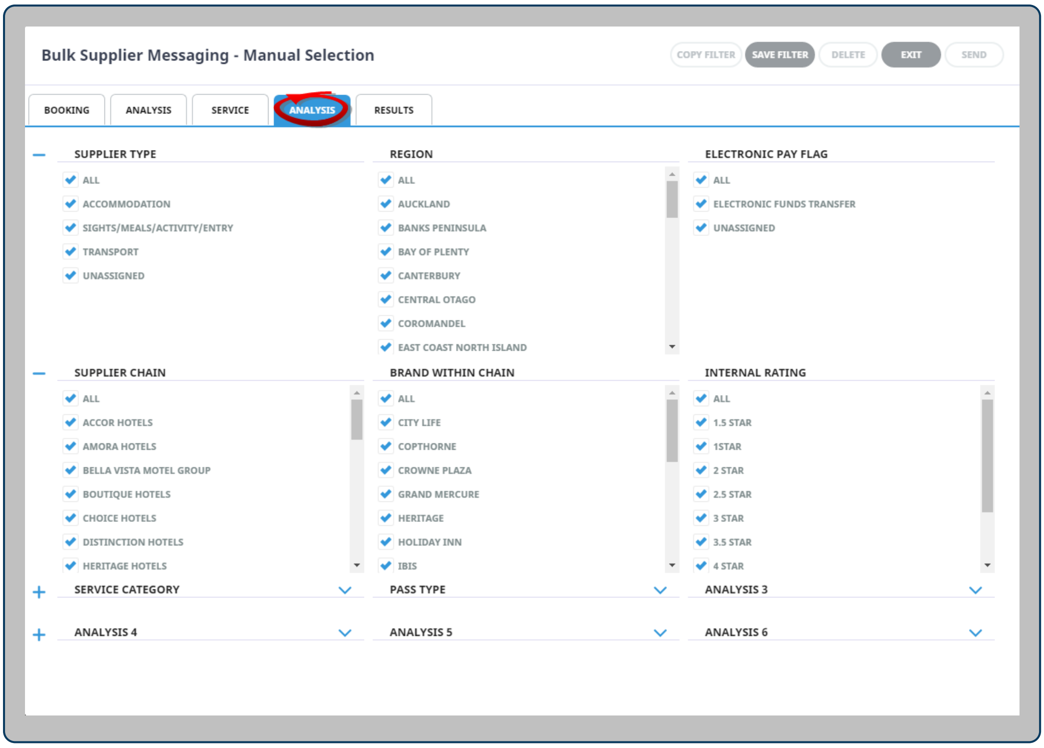


Service Tab

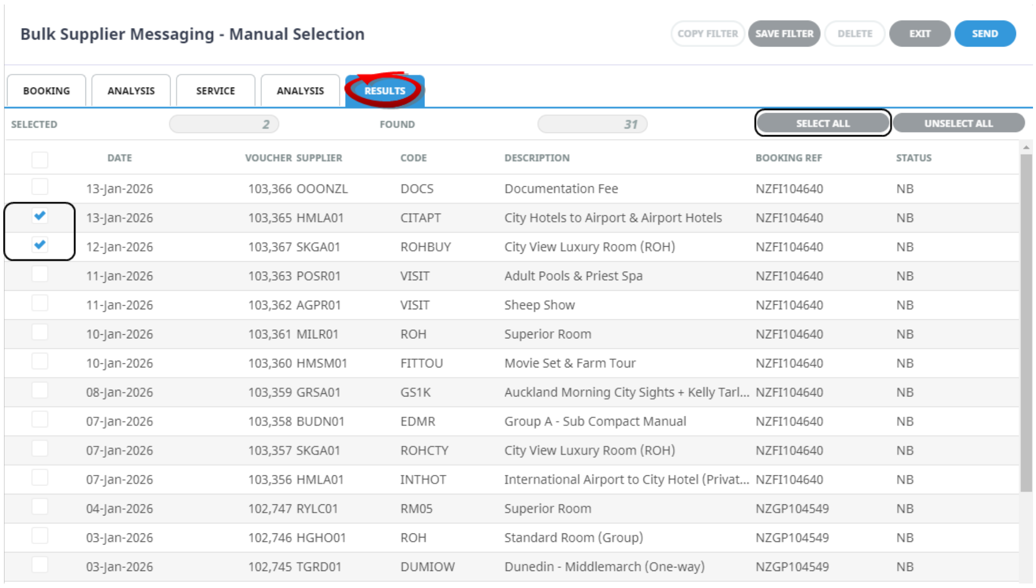


Analysis Tab (Supplier and Service Analysis)

In this example the Supplier Analysis fields have been expanded using +. Where as the Product Analysis fields have been left minimised. Your company's Analysis Fields and codes will be different to those shown in this User Manual and will reflect your organisations analysis requirements.



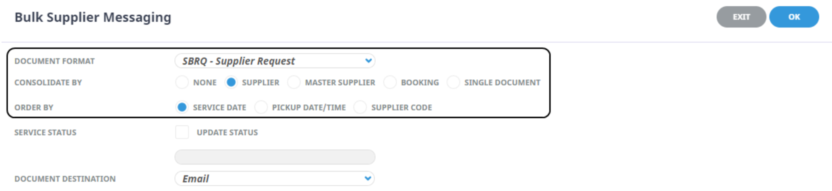
5. Click on the **Results Tab**. Select the services using the **Selected check boxes** next to each service, or use **Select All**.



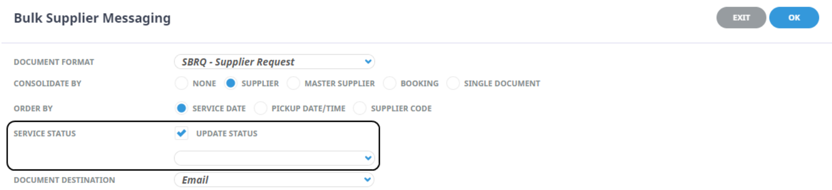
6. To send the messages, click **Send**.

7. Click **Exit** to discard any changes.

8. If Send is clicked, the **Bulk Supplier Messaging** screen will display. Select the **Document Format**, the **Consolidate By** option (if any) and how the messages will be ordered.



9. To updated Service Status, click the **Update Status** check box, and select the required status code from the drop-down.

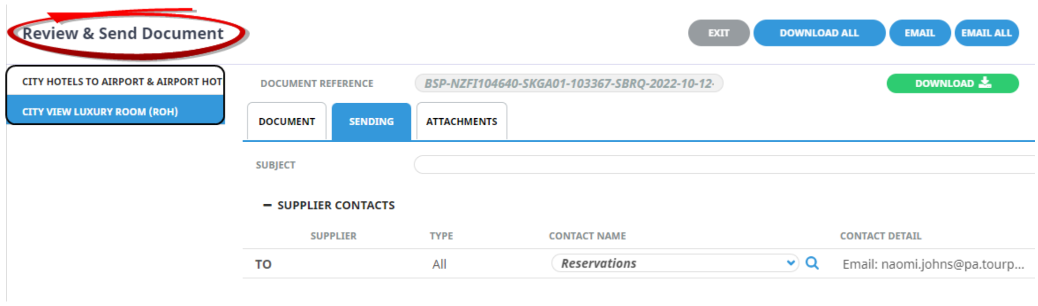


NOTE: This messaging example has been configured to use email as a **Document Destination**.

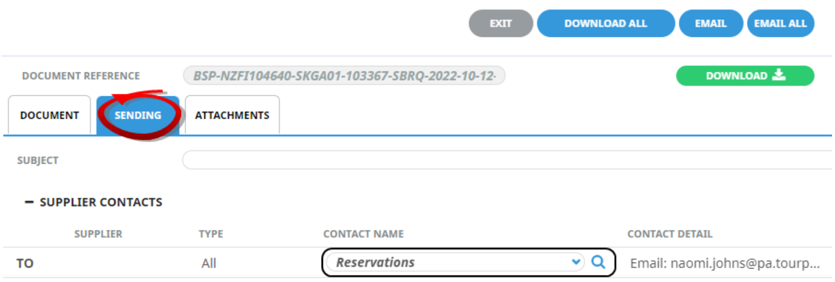
10. Click **OK** to keep the changes and save or update the entry.

11. Click **Exit** to discard any changes.

12. If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.

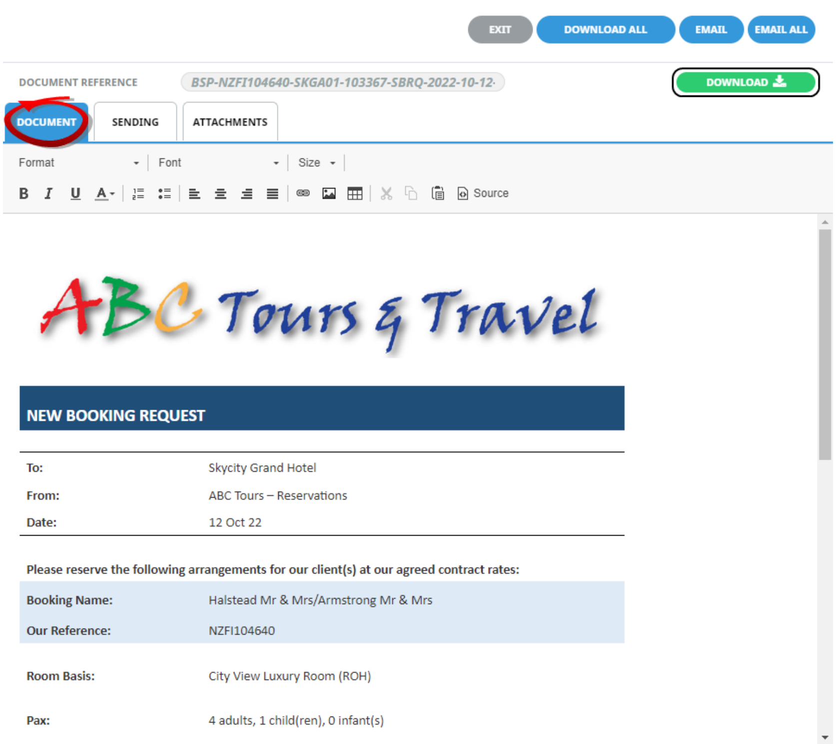


13. The **Sending Tab** will open if the Email and Sending tabs were activated when the message template was setup to send as an email. The sending tab allows you to view the email text that will be sent and the contact name and address the email is sending to.



NOTE: A contact will default from the coding in the message template, however an alternative contact name can be selected using the drop down arrow. The options for CC, and BCC are also available. A list of Contact names attached to the Agent will display in a dropdown, or an alternative (or manual contact) email address can be entered using the search button.

14. On the **Document Tab**, you can examine the generated document or **Download** it.



NOTE: A document can be downloaded from any of the tabs within Review & Send Documents.

Download will open the document in Microsoft Word. Any amendments made to the document in Word will not be saved unless the document is uploaded back into Tourplan.

15. On the **Attachments Tab**, click **Add** to add additional attachments to send with your email.

NOTE: If the Message Template has been configured to send attachments, a list of attachments will show on screen.

16. Click **Email** to send the document.

NOTE: 'Email All' will only be available if each listed service has an email address allocated.

17. Click **Exit** to discard any changes.

About Bulk Supplier Messaging Filters

Filter selection combinations are dependent on user's company's requirements. Selection of any filter combinations will return results in the Results Tab.

There are 4 Tabs that include field filter selections:

- Booking Tab.
- Analysis Tab (Booking and Agent).

- Service Tab.
- Analysis Tab (Supplier and Product).

Booking Tab

Last Worked Date From/To

The last worked date(s) of the services to be selected.

Travel Date From/To

Used to select services with a specific, or range of, travel dates of the services to be selected.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

NOTE: When a Master Agent (or range of Master Agents) is entered in these fields, Tourplan will find services in those bookings where the Agent(s) have the Master Agents attached to them. When searching on the Master Agent field, the Agent field should be left blank.

Date Entered From/To

The booking entered date(s) of the services to be selected.

Consultant

The consultant code attached to the bookings whose services are to be output.

Booking Types

The type of bookings that services are to be output from.

Booking Type selection includes:

- All booking types - services from either FIT bookings or Group bookings will be selected.
- FIT's - those services that are attached to FIT bookings will be selected.
- Groups - those services that are attached to Group bookings will be selected.

Reference

The reference attached to the booking that services are to be output from. This field will only accept the actual reference number if the Branch/Department components of the booking reference are selected from the Booking Branch and Booking Department multi select boxes.

Booking Status

By default, all booking statuses are checked and services in bookings that have that status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and services in bookings that have those branches will be selected.

Department

By default all departments are checked, services in bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user's company's system.

Service Tab

Service Date From/To

The service date(s) of the services to be selected.

Supplier From/To

Used to select services with a specific, or range of, supplier code(s) matching the selection.

Master Suppler From/To

Used to select services with a specific, (or range of) Master Supplier code(s) matching the selection.

NOTE: When a Master Supplier (or range of) Master Suppliers is entered in these fields, Tourplan will find those services whose supplier(s) have the Master Suppliers attached to them. When searching on the Master Supplier fields, the Supplier fields should be left blank.

Service Status

By default, all service statuses are checked and services that are this status will be selected. Un-check those statuses that are not required.

Service

Used to select services with a specific, (or range of) service code(s) matching the selection.

Location

Multi select checkboxes are used to select services in a specific location, by default all are selected.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier level selections attached to the service.

Product Analysis

The bottom two rows of this tab are the 6 Product Analysis codes. These are Product Analysis codes attached to the booking services.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected

The cell to the right of this heading will provide you with the number of services that have been selected.

Found

The system will provide you with the number of services found, matching the filter criteria.

Select All/Unselect All

Select all services found, or un-select all services selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Supplier Messaging, see "Bulk Documentation" on page 253.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Selected check boxes

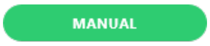
Services can be individually selected.

Save Filters for Supplier Messages

The save filters feature of Bulk Supplier messaging allows users to save common or frequently used Supplier Message filters. If filters are saved a list of pre-saved messages are given a description which will be used for easy identification for users to know the messages' intended use.

Save Filters for Supplier Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > Bookings > Supplier Messaging**.
2. Click **Manual**.

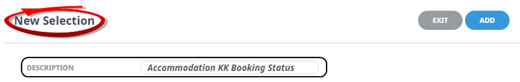


3. On the blank Bulk Supplier Messaging - Manual Selection screen, the **Service Tab** will open. Select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (PCM and Agent)**, **Service Tab** and the **Analysis Tab (Supplier and Product)**.

   View Supplier Messaging Filter Selections to learn more about all the field selections available, or view the individual tab filters: PCM Tab, Analysis (PCM and Agent), Service, Analysis (Supplier and Product), Results.

   NOTE: There are two tabs with the heading Analysis: the Analysis Tab on the left refers to the PCM or Agent Analysis field selections, whereas the Analysis Tab on the right refers to Supplier and Service Analysis field selections.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selection a *Description*.



8. Click **Add** to add this filter description.

9. Click **Exit** to discard any changes.

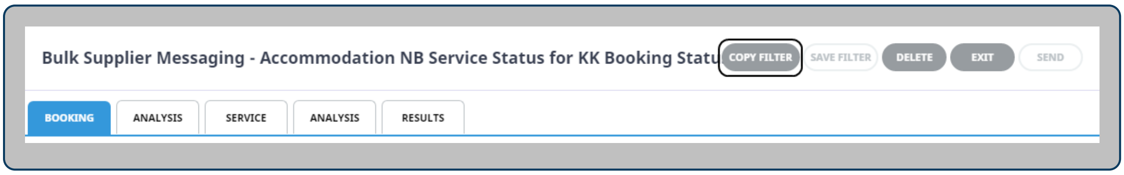
   NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the description will display each time a user opens Bulk Supplier Messaging. If selected for future Bulk Supplier Message sending, results will be returned based on the saved filters.
10. If **Add** is selected the results screen will re-display, where you can select to **Send** messages (following from Step 5 in the previous procedure), or **Exit**.

The procedures just described are sufficient to create manual filter criteria to send bulk supplier messages from PCMs, and to save filters for future use. There are many unique filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

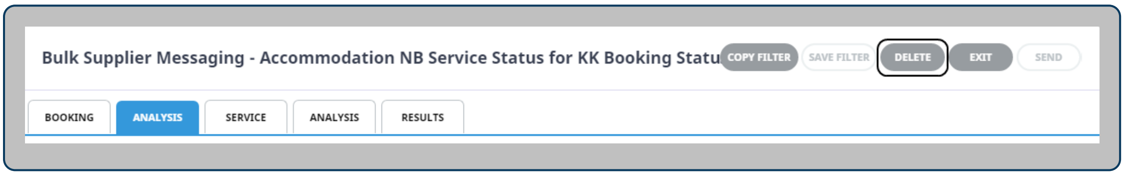
Copy Supplier Messaging Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new Description from within the Results Tab. Users can copy existing filters by using **Copy Filters** - make the necessary changes to filter selection. Re-saving will give the newly copied filters a New Description.



Deletion of Supplier Messaging Filter Descriptions

Deletion of Filter Descriptions is allowed and no warning message will display. The system will allow you to delete if the Filter Description is no longer required.



Agent Messaging

Bulk Messaging allows messages to be sent in bulk to Agents. The messages selected and sent can cover multiple bookings. Concurrently, the status of the services that have had messages sent can be updated.

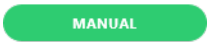
NOTE: Bulk Messaging will not suit all companies. This function is typically used where agent messaging is consolidated (either by user or company) and output at specific times or at end of day.

The selection criteria of frequently sent messages can be saved and recalled. If saved, a list will display when the Agent Messaging menu has been selected. Filters can be copied and saved from within the Bulk Agent Messaging screen.

Create Manual Agent Messaging Filters and Send Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > Bookings > Agent Messaging**.

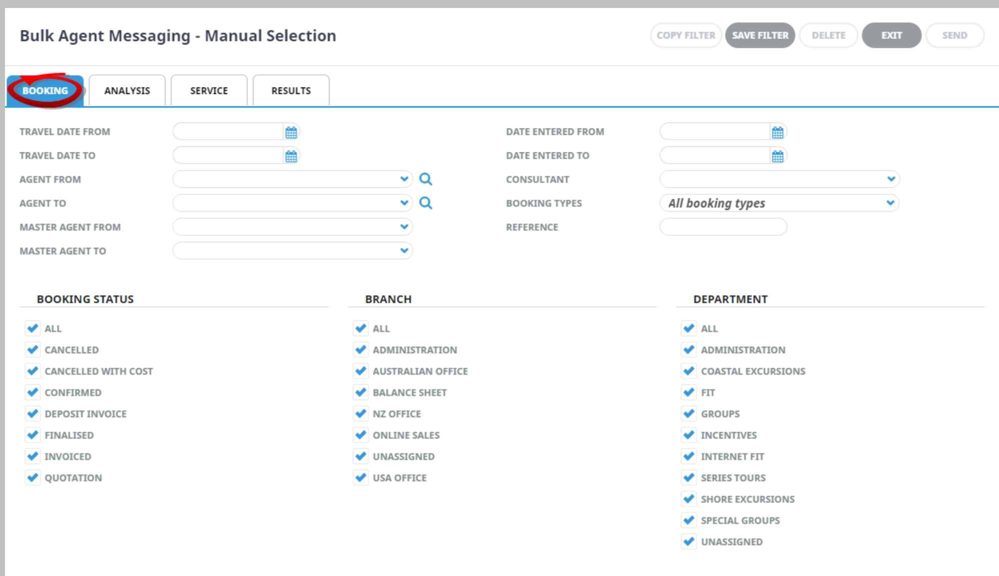
2. Click **Manual**.

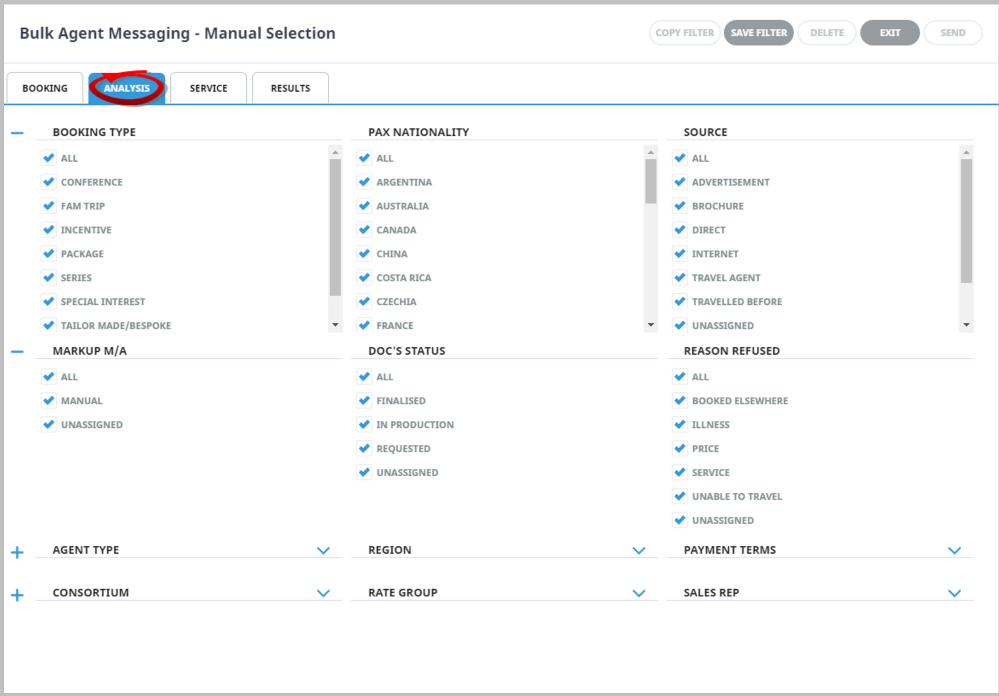
3. On the blank **Bulk Agent Messaging - Manual Selection** screen, the **Bookings Tab** will open, select the required filters from the field selections available within the **Booking Tab**, **Analysis Tab (Booking and Agent)** and the **Service Tab**.

   View Agent Filter Selections to learn more about all field selections available, or view the individual tab filters: Booking, Analysis (Booking and Agent), Service or Results.

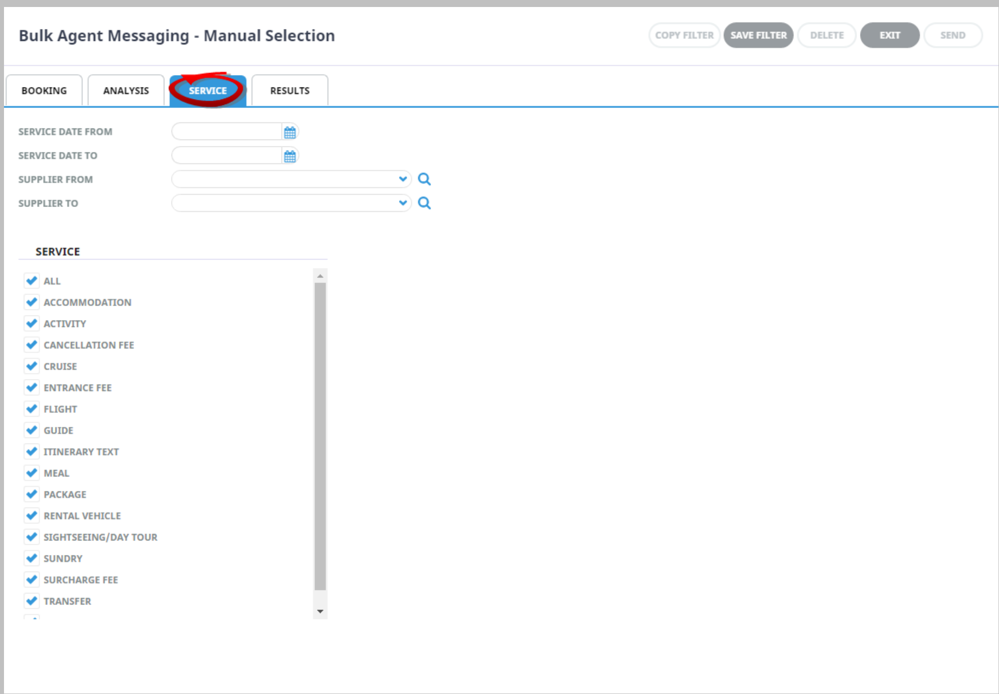
   Booking Tab

Analysis Tab

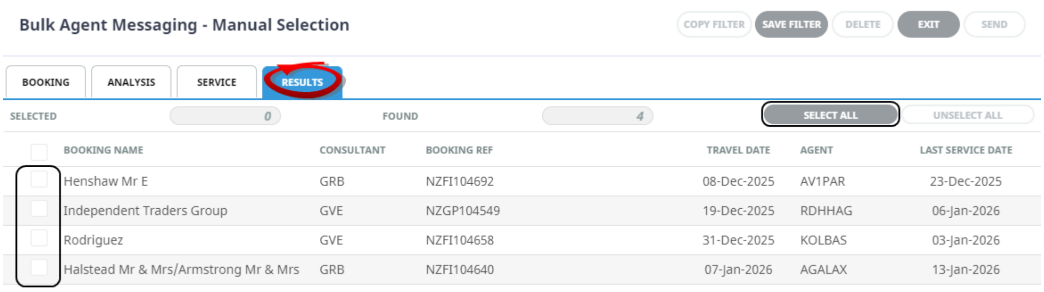


Services Tab



4. Check the **completed screens**.

5. Click on the **Results Tab**. Select the services using the **Selected check box** next to each service, or use **Select All**.



6. To send the messages, click **Send**.

7. Click **Exit** to discard any changes.

NOTE: If **Save** was selected the *Review & Send Document* screen will display and each service can be reviewed before sending. See "Supplier Messaging" on page 21.

About Bulk Agent Messaging Fields

Filter selection combinations are dependent on user's company's requirements. Selection of any filter combinations will return results in the Results Tab.

There are 4 Tabs that include field filter selections:

- Booking Tab.
- Analysis Tab (Booking and Agent).
- Service Tab.
- Results Tab.

Booking Tab

Travel Date From/To

Used to select services with a specific, or range of, travel dates of the bookings to be selected.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, (or range of) Master Agent code(s) in the booking header matching the selection.

Date Entered From/To

The booking entered date(s) of the bookings to be selected.

Consultant

The consultant code attached to the bookings whose messages are to be output.

Booking Types

The type of bookings that messages are to be output from selection includes:

- All booking types - bookings from either FIT bookings or Group bookings will be selected.
- FIT's - those bookings that are FIT bookings will be selected.
- Groups - those bookings that are Group bookings will be selected.

Reference

The reference attached to the booking that message is to be output from. This field will only accept the actual reference number if the Branch/Department components of the booking reference are selected from the Booking Branch and Booking Department multi select boxes.

Booking Status

By default, all booking statuses are checked and bookings that have this status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and bookings that have those branches will be selected.

Department

By default all departments are checked, bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this user manual will vary and will display what has been setup in each user's company's system.

Service Tab

Service Date From/To

The service date(s) of the services to be selected.

Supplier From/To

Used to select services with a specific, or range of, supplier code(s) matching the selection.

Service

Used to select services with a specific, (or range of) service code(s) matching the selection.

Results Tab

Selected

The cell to the right of this heading will provide you with the number of bookings that have been selected. (The screen capture above is showing that 0 services have been selected).

Found

The system will provide you with the number of bookings found matching the filter criteria.

Select All/Unselect All

Select all services found, or un-select all bookings selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Agent Messaging, see "Bulk Documentation" on page 253.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Selected check boxes

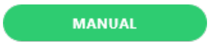
Bookings can be individually selected.

Save Filters for Agent Messages

The save filters feature of Bulk Agent messaging allows users to save common or frequently used Agent Message filters. If filters are saved a list of pre-saved messages are given a description which will be used for easy identification for users to know the messages' intended use.

Save Filters for Agent Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > Bookings > Agent Messaging**.
2. Click **Manual.**

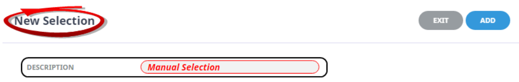
3. On the blank Bulk Agent Messaging - Manual Selection screen, the **Service Tab** will open. Select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (Booking and Agent)**, **Service Tab**, and the **Analysis Tab (Product and Supplier)**.

   View Agent Filter Selections to learn more about all field selections available, or view the individual tab filters: PCM, Analysis (Booking and Agent), Service, Analysis (Product and Supplier) or Results.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selection a **Description**.

   NOTE: The description will automatically default to the description name 'Manual Selection': simply over-type with the required text.

8. Click **Add** to add this filter description.

9. Click **Exit** to discard any changes.

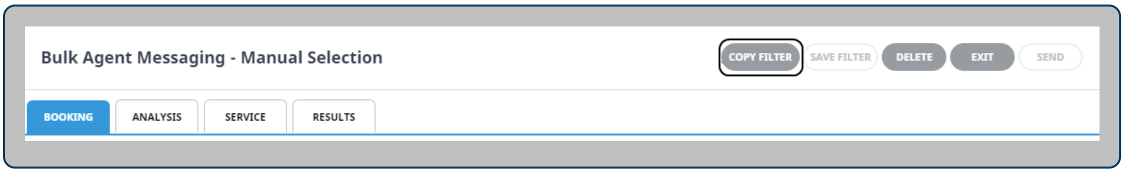
   NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Agent Messaging, if selected for future Bulk Agent Message sending results will be returned based on the saved filters.
10. If **Add** is selected you will return to the results screen, where you can select to **Send** messages (following from Step 5 in the previous procedure), or **Exit**.

> The procedures just described are sufficient to create manual filter criteria to send bulk agent messages from PCMs, and to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

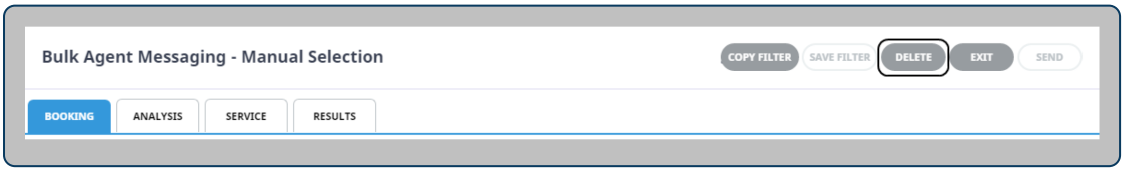
Copy Agent Messaging Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Results Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Agent Messaging Filter Descriptions

Deletion of Filter Descriptions is allowed, and no warning message will display. The system will allow you to Delete if the Filter Description is no longer required.



Vouchers

Bulk Messaging allows voucher messages to be sent in bulk. The messages selected and sent can cover multiple bookings. Concurrently, the status of the services where messages have been sent can be updated.

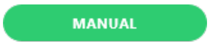
NOTE: Bulk Voucher Messaging will not suit all companies. This function is typically used where voucher messaging is consolidated (either by user or company) and output at specific times or at end of day.

The selection criteria of frequently sent messages can be saved and recalled, if saved a list will display when the Voucher Messaging menu is selected. Frequently used filters can be copied and saved from within the Bulk Voucher Messaging screen.

Create Manual Voucher Messaging Filters and Send Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > Bookings > Voucher Messaging**.

2. Click **Manual**.

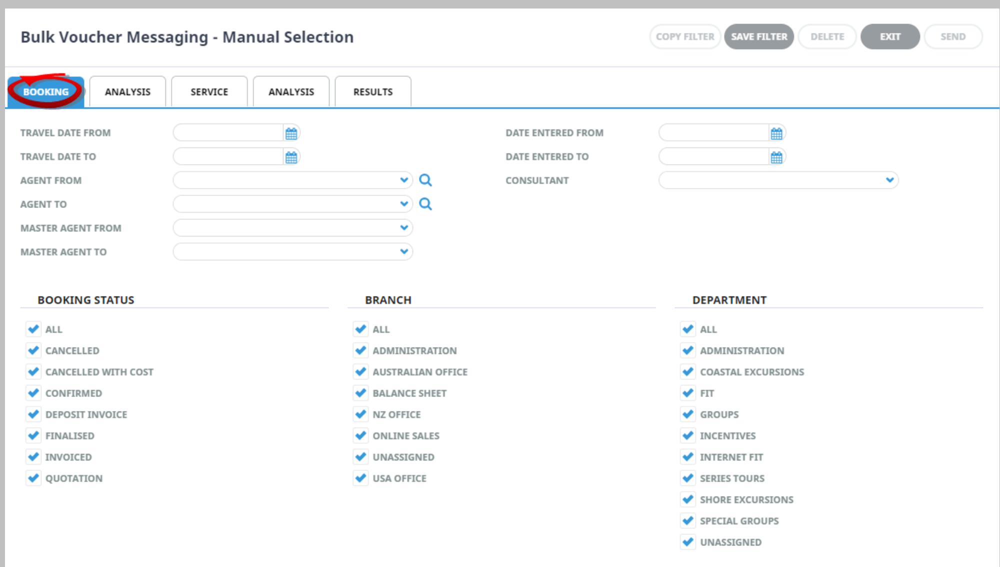


3. On the blank **Bulk Voucher Messaging - Manual Selection** screen, the **Booking Tab** will open. Select the required filters from the field selections available within the **Booking Tab**, **Analysis Tab (Booking)**, **Service Tab** and the **Analysis Tab (Supplier)**.

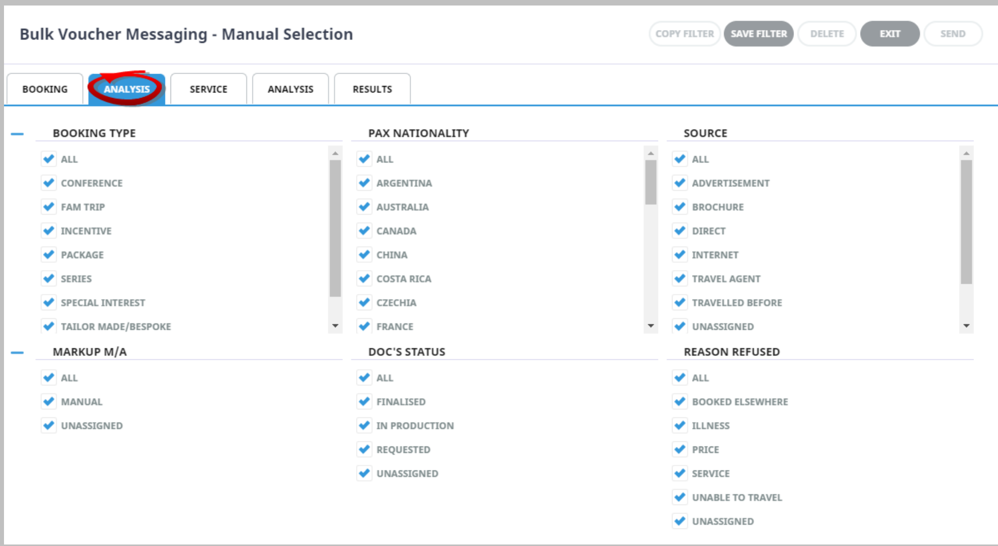
   View Voucher Filter selections to learn more about all the field selections available, or view the individual tab filters: Booking Tab, Analysis (Booking), Service, Analysis (Supplier), Results.

   NOTE: There are two tabs with the heading Analysis, the Analysis Tab on the left refers to the Booking Analysis field selections, whereas the Analysis Tab on the right refers to the Supplier Analysis field selections.

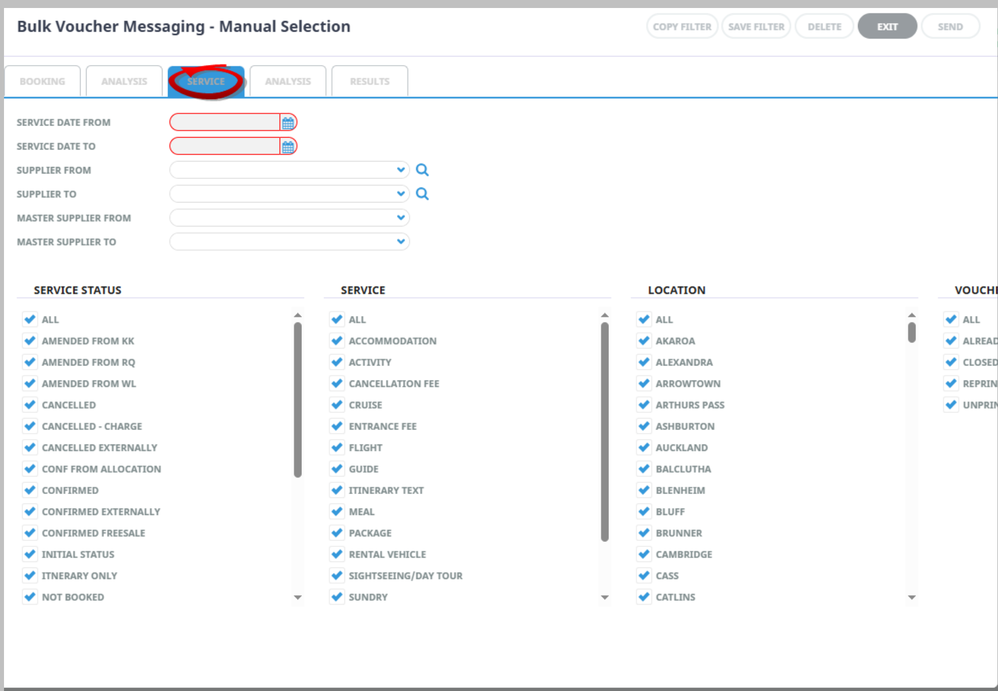
Booking Tab

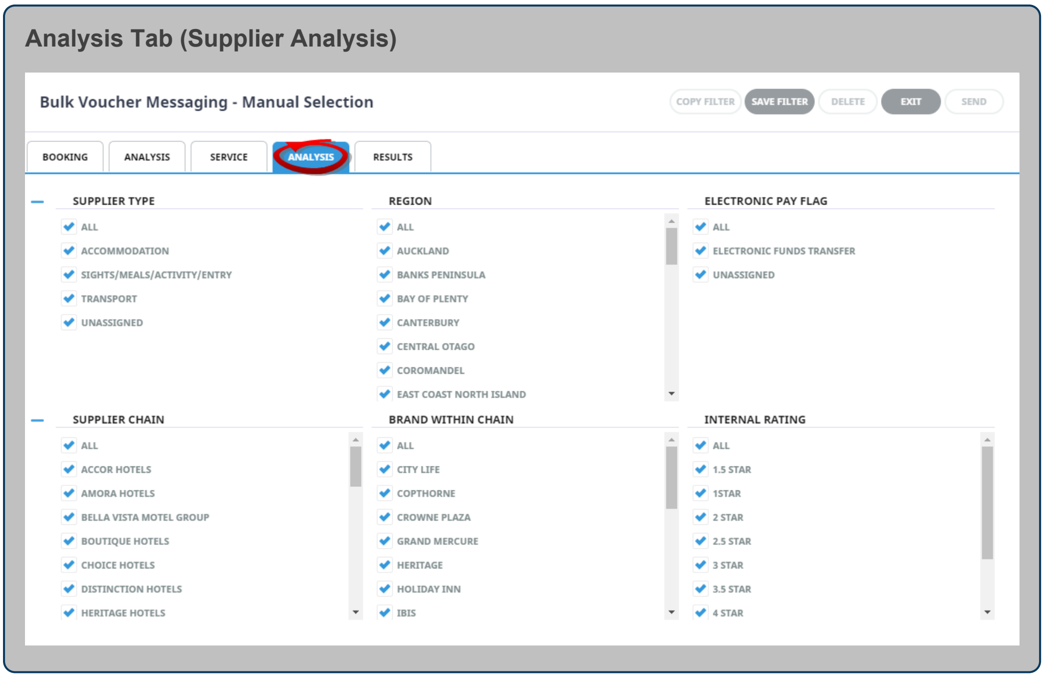


Analysis Tab (Booking Analysis)



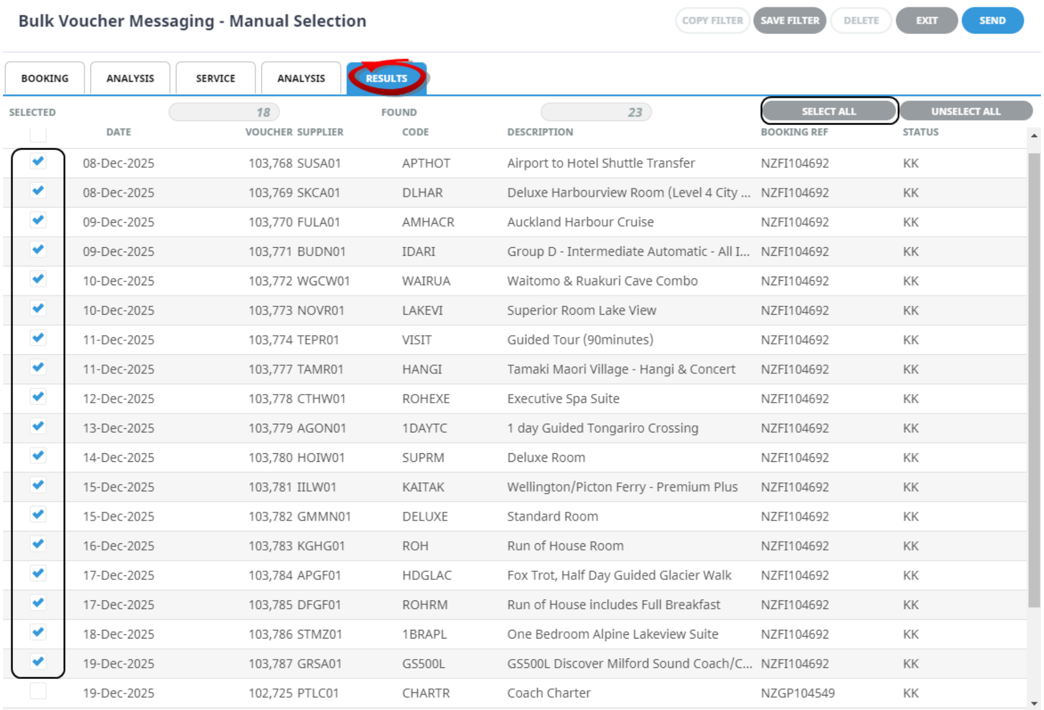
Service Tab





4. Check the **completed screens.**

5. Click on the **Results Tab**. Select the services using the **Selected check box** next to each service, or use **Select All**.

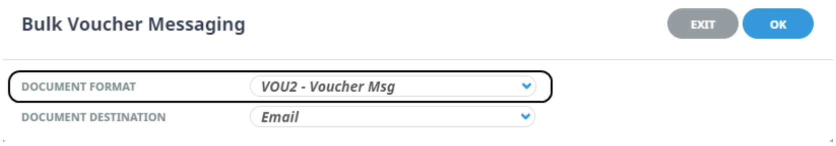


	DATE	VOUCHER	SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS
✔	08-Dec-2025	103,768	SUSA01	APTHOT	Airport to Hotel Shuttle Transfer	NZFI104692	KK
✔	08-Dec-2025	103,769	SKCA01	DLHAR	Deluxe Harbourview Room (Level 4 City ...	NZFI104692	KK
✔	09-Dec-2025	103,770	FULA01	AMHACR	Auckland Harbour Cruise	NZFI104692	KK
✔	09-Dec-2025	103,771	BUDN01	IDARI	Group D - Intermediate Automatic - All I...	NZFI104692	KK
✔	10-Dec-2025	103,772	WGCW01	WAIRUA	Waitomo & Ruakuri Cave Combo	NZFI104692	KK
✔	10-Dec-2025	103,773	NOVR01	LAKEVI	Superior Room Lake View	NZFI104692	KK
✔	11-Dec-2025	103,774	TEPR01	VISIT	Guided Tour (90minutes)	NZFI104692	KK
✔	11-Dec-2025	103,777	TAMR01	HANGI	Tamaki Maori Village - Hangi & Concert	NZFI104692	KK
✔	12-Dec-2025	103,778	CTHW01	ROHEXE	Executive Spa Suite	NZFI104692	KK
✔	13-Dec-2025	103,779	AGON01	1DAYTC	1 day Guided Tongariro Crossing	NZFI104692	KK
✔	14-Dec-2025	103,780	HOIW01	SUPRM	Deluxe Room	NZFI104692	KK
✔	15-Dec-2025	103,781	IILW01	KAITAK	Wellington/Picton Ferry - Premium Plus	NZFI104692	KK
✔	15-Dec-2025	103,782	GMMN01	DELUXE	Standard Room	NZFI104692	KK
✔	16-Dec-2025	103,783	KGHG01	ROH	Run of House Room	NZFI104692	KK
✔	17-Dec-2025	103,784	APGF01	HDGLAC	Fox Trot, Half Day Guided Glacier Walk	NZFI104692	KK
✔	17-Dec-2025	103,785	DFGF01	ROHRM	Run of House includes Full Breakfast	NZFI104692	KK
✔	18-Dec-2025	103,786	STMZ01	1BRAPL	One Bedroom Alpine Lakeview Suite	NZFI104692	KK
✔	19-Dec-2025	103,787	GRSA01	GS500L	GS500L Discover Milford Sound Coach/C...	NZFI104692	KK
	19-Dec-2025	102,725	PTLC01	CHARTR	Coach Charter	NZGP104549	KK

6. To send the messages, click **Send**.

7. Click **Exit** to discard any changes.

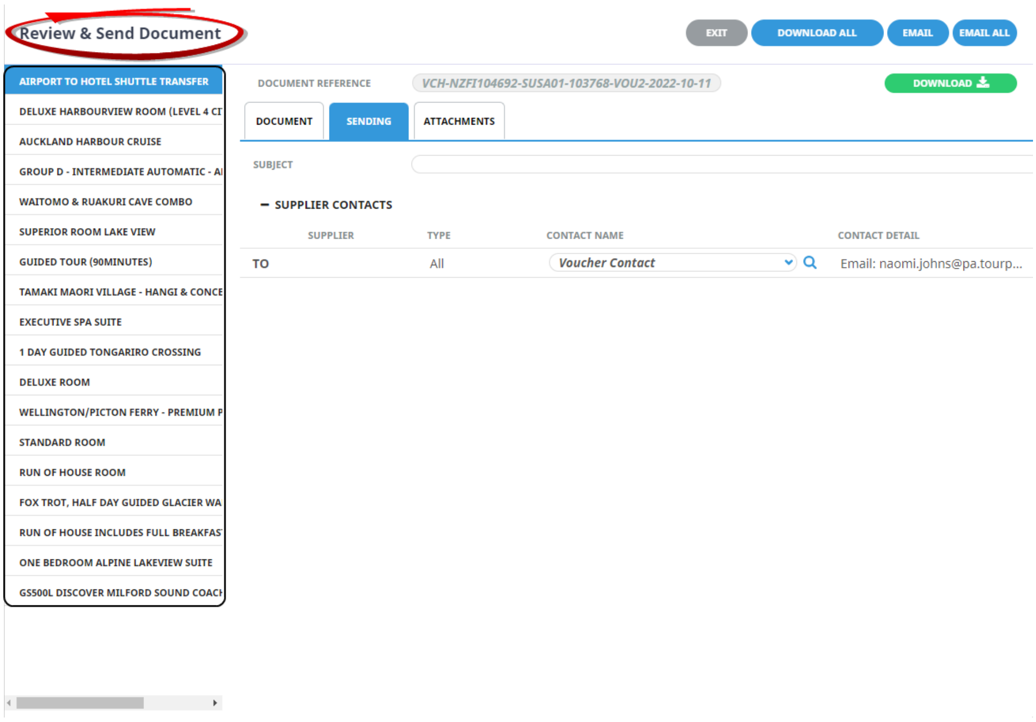
8. If **Send** is clicked, the **Bulk Voucher Messaging** screen will display. Select the **Document Format** and **Document Destination** to send to.



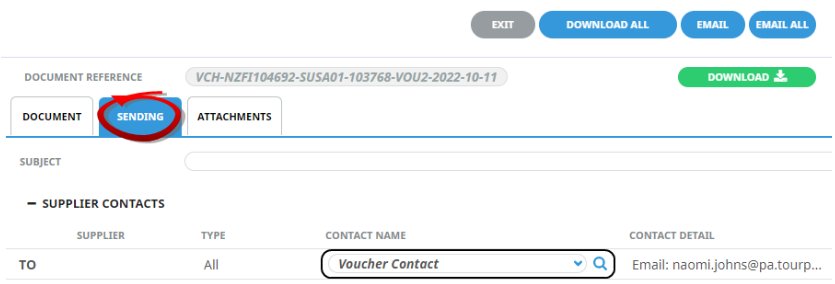
9. Click **OK** to keep the changes and save or update the entry.

10. Click **Exit** to discard any changes.

11. If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.

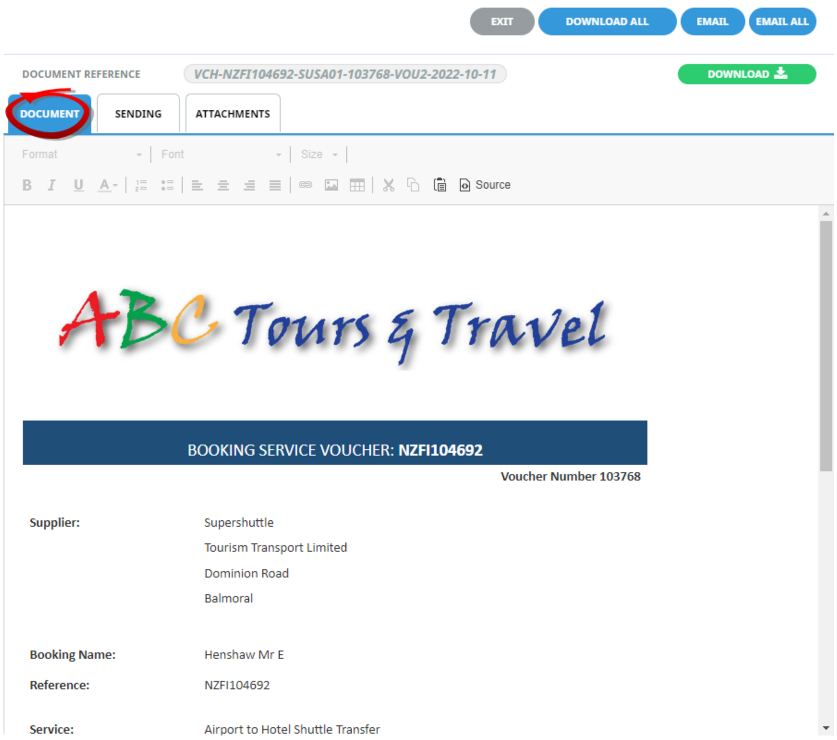


12. The **Sending Tab** will open if the Email and Sending tabs were activated when the message template was setup to send as an email. The sending tab allows you to view the email text that will be sent and the contact name and address the email is sending to.



NOTE: A contact will default from the coding in the message template, however an alternative contact name can be selected using the drop down arrow. The options for CC, and BCC are also available. A list of Contact names attached to the Agent will display in a dropdown, or an alternative (or manual contact) email address can be entered using the search button.

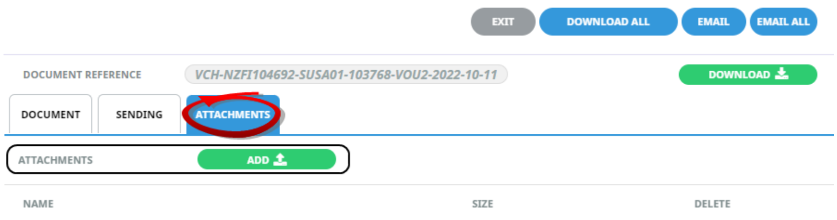
13. On the **Document Tab**, you can examine the generated document or download it (using the **Download** button).



NOTE: A document can be downloaded from any of the tabs within **Review & Send Documents**.

Download will open the document in Microsoft Word. Any amendments made to the document in Word will not be saved unless the document is uploaded back into Tourplan.

14. On the **Attachments Tab**, click **Add** to add additional attachments to send with your email.



NOTE: If the Message Template has been configured to send attachments, a list of attachments will show on screen.

15. Click **Email** to send the document.

NOTE: 'Email All' will only be available if each listed service has an email address allocated.

16. Click **Exit** to discard any changes.

About Bulk Documentation - Voucher Messaging Filter Selections

Filter selection combinations are dependant on user's company's requirements. Selection of any filter combinations will return results in the Results Tab.

There are 4 Tabs that include field filter selections:

- Booking Tab.
- Analysis Tab (Booking).
- Service Tab.
- Analysis Tab (Supplier).

Booking Tab

Travel Date From/To

Used to select services with a specific, (or range of), travel dates of the services to be selected.

Agent From/To

Used to select services with a specific, (or range of), agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, (or range of), Master Agent code(s) in the booking header matching the selection.

NOTE: When a Master Agent (or range of Master Agents) is entered in these fields, Tourplan will find services in those bookings where the Agent(s) have the Master Agents attached to them. When searching on the Master Agent fields the Agent fields should be left blank.

Date Entered From/To

The booking entered date(s) of the services to be selected.

Consultant

The consultant code attached to the bookings whose services are to be output.

Booking Status

By default, all booking statuses are checked and services in bookings that have those statuses will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and services in bookings that have those branches will be selected.

Department

By default all departments are checked, services in bookings that have those branches will be selected.

Analysis Tab (Booking Analysis)

Booking Analysis

These are booking level selections.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this user manual will vary and will display what has been setup in each user's company's system.

Service Tab

Service Date From/To

The service date(s) of the services to be selected.

Supplier From/To

Used to select services with a specific, or range of, supplier code(s) matching the selection.

Master Suppler From/To

Used to select services with a specific, or range of, Master Supplier code(s) matching the selection.

NOTE: When a Master Supplier (or range of Master Suppliers) is entered in these fields, Tourplan will find those services whose supplier(s) have the Master Suppliers attached to them. When searching on the Master Supplier fields, the Supplier fields should be left blank.

Service Status

By default, all service statuses are checked and services with those statuses will be selected. Un-check those statuses that are not required.

Service

Used to select services with a specific, or range of, service code(s) matching the selection.

Location

Multi select checkboxes used to select services in a specific location. (By default All are checked).

Voucher Status

Used to select services with a specific, or range of, voucher statuses matching the selection.

Analysis Tab (Supplier Analysis)

Supplier Analysis

The rows of this tab are the 6 Supplier Analysis codes. These are Supplier level selections attached to the service.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this procedure will vary and will display what has been setup in each user's company's system.

Results Tab

Selected

The cell to the right of this heading will provide you with the number of services that have been selected.

Found

The system will provide you with the number of services found, matching the filter criteria.

Select All/Unselect All

Select all services found, or un-select all services selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Voucher Messaging, see "Bulk Documentation" on page 253.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Selected check boxes

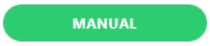
Services can be individually selected.

Save Filters for Vouchers

There will be common or frequently used Voucher Message Filters that your organisation will use. These can be saved and given a Description for users to select instead of Manual Filter entries.

Save Filters Procedure for Vouchers

1. From the Home menu, select **Home > Operations > Bulk Documentation > Bookings > Voucher**.
2. Click **Manual**.

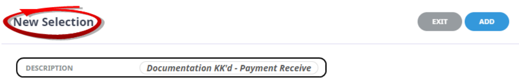


3. On the blank Bulk Voucher Messaging - Manual Selection screen, the **Bookings Tab** will open. Select the required filters from the field selections available within the **Booking Tab**, **(Booking) Analysis Tab**, **Service Tab** and the **(Supplier) Analysis Tab**.

   View Voucher Filter Selections to learn more about all the field selections available, or view the individual tab filters: Booking, Analysis (Booking), Service, Analysis (Supplier), Results.

   NOTE: There are two tabs with the heading Analysis: the Analysis Tab on the left refers to the Booking Analysis field selections, whereas the Analysis Tab on the right refers to Supplier Analysis field selections.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selection a *Description*.



8. Click **Add** to add this filter description.

9. Click **Exit** to discard any changes.

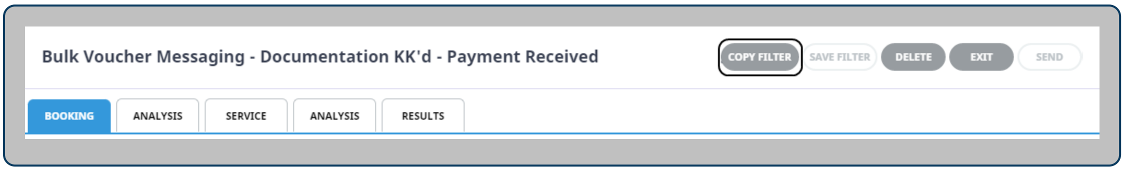
   NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Voucher Messaging. If selected for future Bulk Voucher Message sending - results will be returned based on the saved filters.
10. If **Add** is selected you will return to the results screen, where you can select to **Send** messages (following from Step 5 in the previous procedure), or **Exit**.

> The procedures just described are sufficient to create manual filter criteria to send bulk voucher run from to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

Copy Voucher Filters

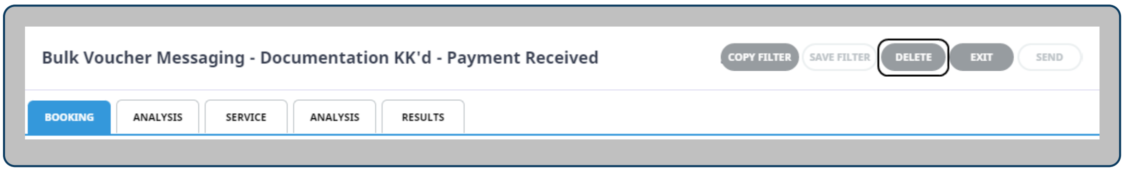
There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Results Tab. Users can copy existing filters by using **Copy Filters**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Voucher Filter Descriptions

Deletion of Filter Descriptions is allowed, and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to delete, the filters will not be able to be retrieved again.

The system will allow you to Delete if the Filter Description if it is no longer required.



PCM Supplier Messaging

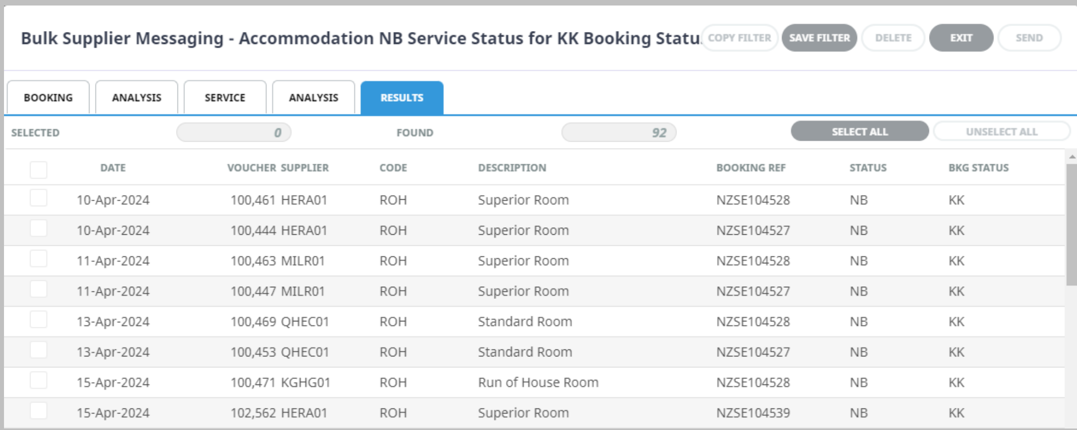
Bulk Messaging allows messages to be sent in bulk to suppliers, and messages selected can be sent from multiple PCMs. Concurrently, the status of the services where messages have been sent can be updated.

NOTE: Bulk Messaging will not suit all companies. This function is typically used where supplier messaging is consolidated (either by user or company) to output at specific times or at the end of day.

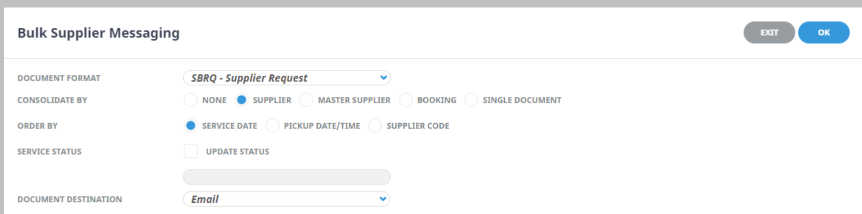
The selection criteria of frequently sent messages can be saved and recalled. If saved, a list will display when the Supplier Messaging menu is selected. Frequently used filters can be copied and saved from within the Bulk Supplier Messaging screen.

For example, with this supplier message we wanted to send bulk messages for a selection of PCMs to secure group pricing for the selected dates of service for the PCM. The system has filtered the PCMs that meet the requirements of service status and PCM status. Now individual selection or select all can be chosen.

NOTE: The service status and booking status used in this example may differ from your company's service status.



After the user has selected the services the supplier requests are to be sent to, a document message format can be selected. Bulk supplier messages are generated and a status can be selected for the services to be updated to.



Field selections also allow the message content to be consolidated by Supplier, Master Supplier, PCM, Single Document.

Create Manual Supplier Messaging Filters and Send Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > PCM Quotes > Supplier Messaging.**

2. Click **Manual.**

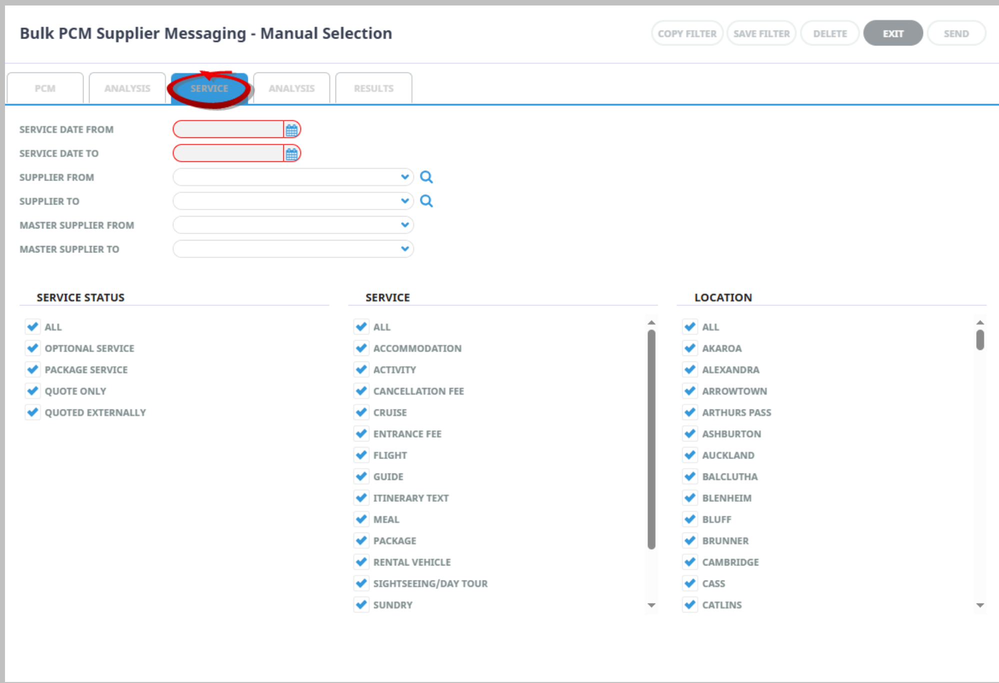
3. On the blank Bulk Supplier Messaging - Manual Selection screen, the **Service Tab** will open, select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (PCM and Agent)**, **Service Tab** and the **Analysis Tab (Supplier and Product)**.

   View Supplier Messaging Filter Selections to learn more about all the field selections available, or view the individual tab filters: PCM Tab, Analysis (PCM), Service, Analysis (Supplier and Product), Results.

NOTE: There are two tabs with the heading Analysis, the Analysis Tab on the left refers to the PCM or Agent Analysis field selections, whereas the Analysis Tab on the right refers to Supplier and Service Analysis field selections.

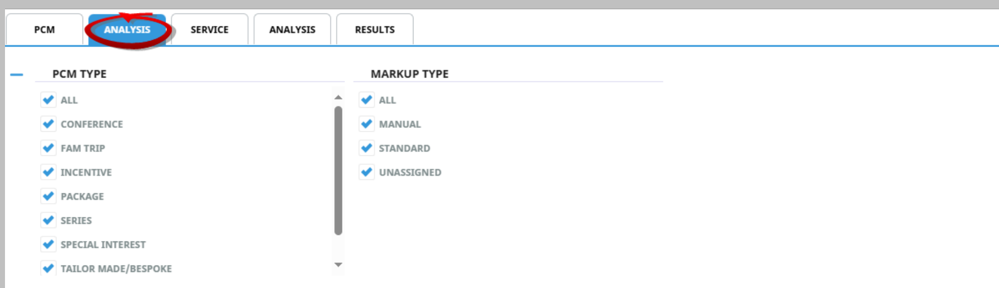
4. Check the **completed screens.**

Service Tab

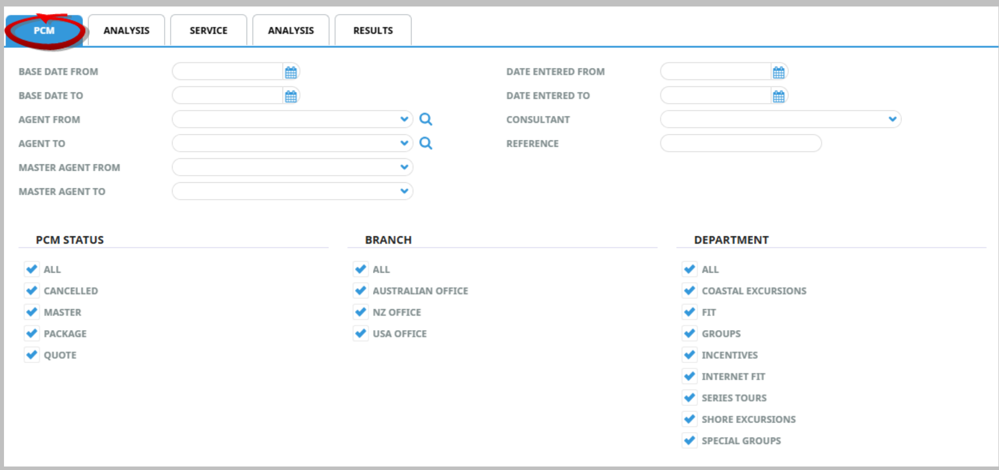


Analysis Tab (PCM Analysis)

In this example the PCM Analysis fields have been expanded using +. Your company's Analysis Fields and codes will be different to those shown in this User Manual and will reflect your organisations analysis requirements.

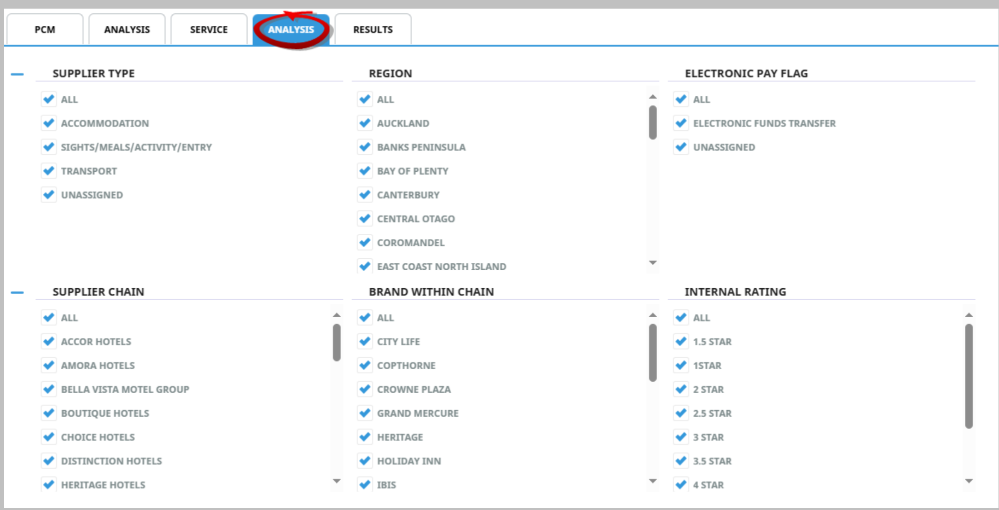


PCM Tab

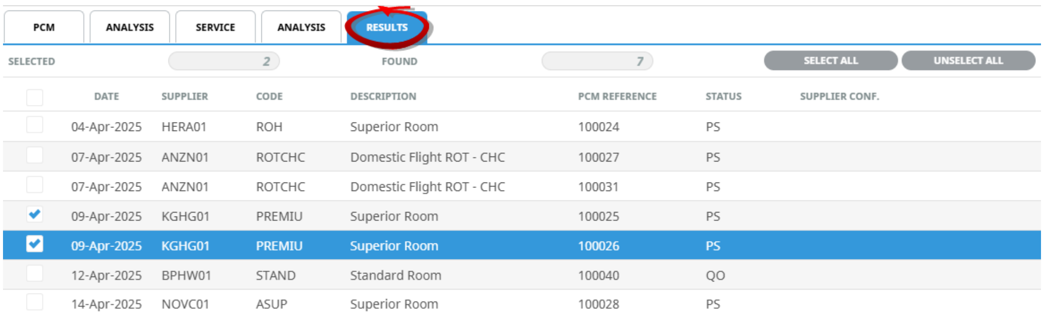


Analysis Tab (Supplier)

In this example the Supplier Analysis fields have been expanded using +. . Your company's Analysis Fields and codes will be different to those shown in this User Manual and will reflect your organisations analysis requirements.



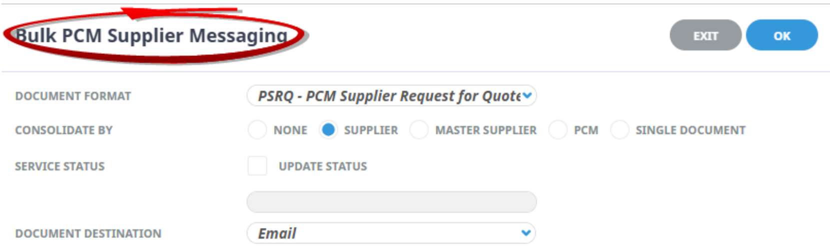
5. Click on the **Results Tab**. Select the services using the **Selected check boxes** next to each service, or use **Select All**.



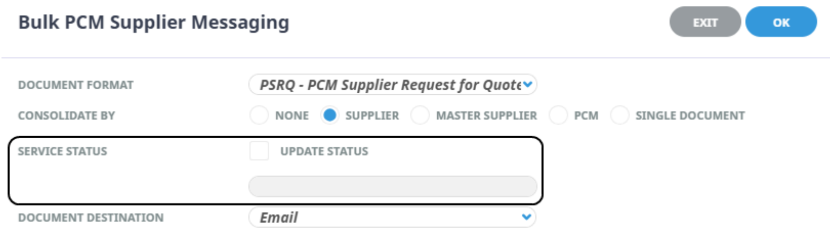
6. To send the messages, click **Send**.

7. Click **Exit** to discard any changes.

8. If Send is clicked, the **Bulk PCM Supplier Messaging** screen will display. Select the **Document Format**, click the radio button for how the messages are to **Consolidate By**.



9. To update Service Status, click the **Update Status** check box, and select the required status code from the drop-down.

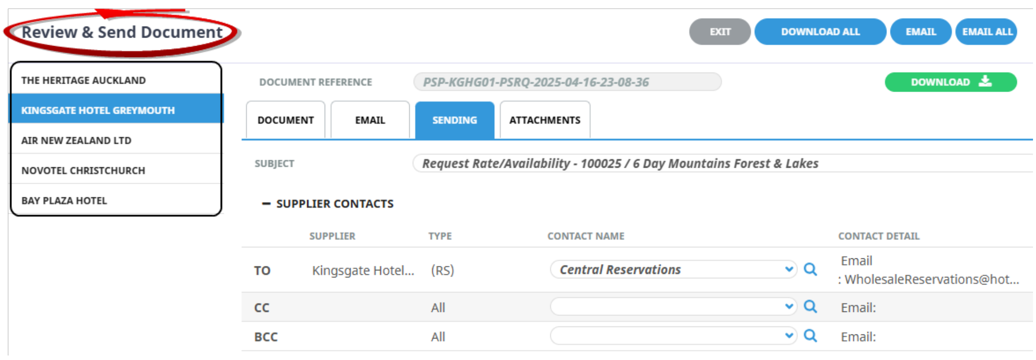


NOTE: This messaging example has been configured to use email as a **Document Destination**, select the **Document Destination** Required.

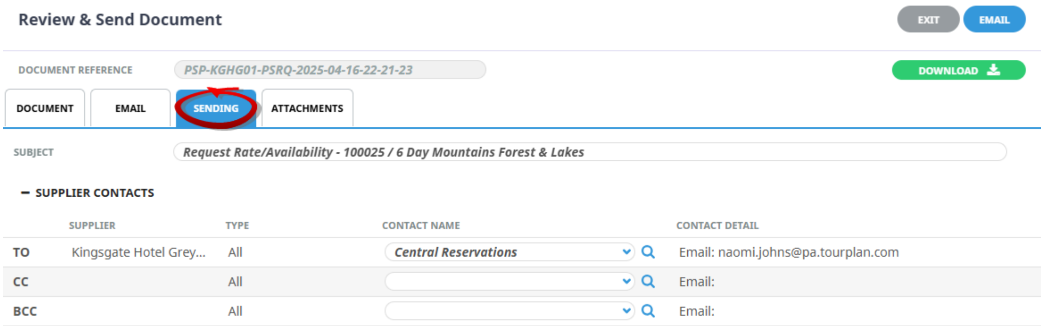
10. Click **OK** to keep the changes and save or update the entry.

11. Click **Exit** to discard any changes.

12. If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.

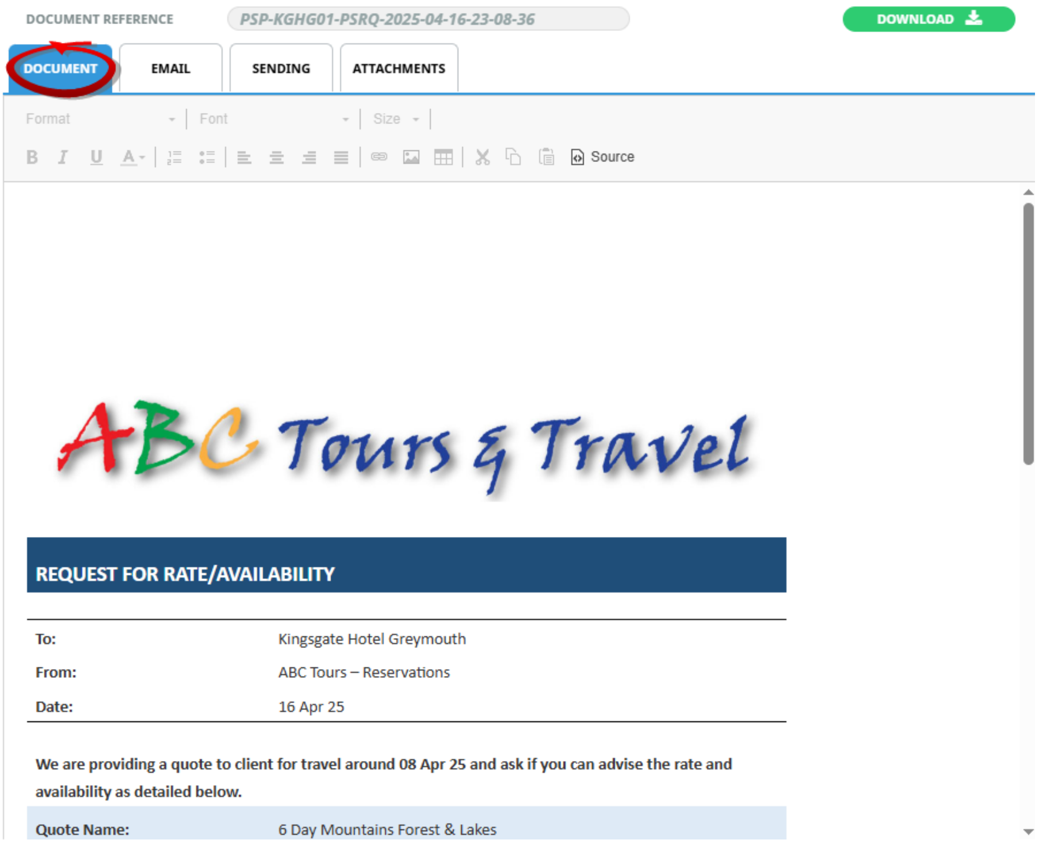


13. The **Sending Tab** will open if the Email and Sending tabs were activated when the message template was setup to send as an email. The Sending tab allows you to view the email text that will be sent and the contact name and address the email is sending to.



NOTE: A contact will default from the coding in the message template, however an alternative contact name can be selected using the drop down arrow. The options for CC, and BCC are also available. A list of Contact names attached to the Supplier will display in a dropdown, or an alternative (or manual contact) email address can be entered using the search button.

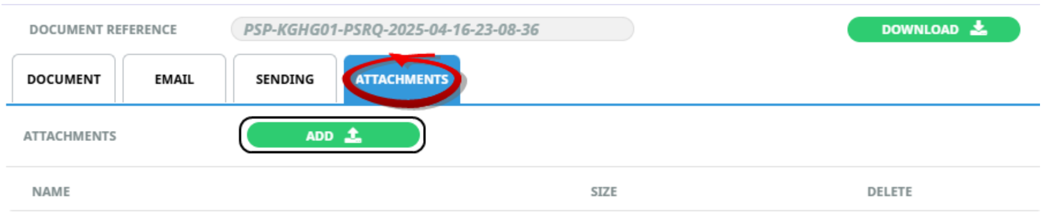
14. On the **Document Tab**, you can examine the generated document or **Download** it.



NOTE: A document can be downloaded from any of the tabs within Review & Send Documents.

> Download will open the document in Microsoft Word. Any amendments made to the document in Word will not be saved unless the document is uploaded back into Tourplan.

15. On the **Attachments Tab**, click **Add** to add additional attachments to send with your email.



NOTE: If the Message Template has been configured to send attachments, a list of attachments will show on screen.

16. Click **Email** to send the document.

NOTE: 'Email All' will only be available if each listed service has an email address allocated.

17. Click **Exit** to discard any changes.

About Bulk Supplier Messaging Filters

Filter selection combinations are dependent on user's company's requirements. Selection of any filter combinations will return results in the Results Tab.

There are 4 Tabs that include field filter selections:

- PCM Tab.
- Analysis Tab (PCM Analysis).
- Service Tab.
- Analysis Tab (Supplier Analysis).

PCM Tab

Base Date From/To

Used to select PCMs with a specific, or range of, base dates of the services to be selected.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Master Agent From/To

Used to select PCMs with a specific, or range of, Master Agent code(s) in the PCM header matching the selection.

NOTE: When a Master Agent (or range of Master Agents) is entered in these fields, Tourplan will find PCMs where the Agent(s) have the Master Agents attached to them. When searching on the Master Agent field, the Agent field should be left blank.

Date Entered From/To

The PCM entered date(s) of the services to be selected.

Consultant

The consultant code attached to the PCM.

Reference

The reference attached to the PCM that messages are to be output from. This field will only accept the actual reference number, the Branch/Department components of the PCM reference are selected from the PCM Branch and Booking Department multi select boxes.

PCM Status

By default, all PCM statuses are checked and PCMs that have that status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and services in PCMs that have those branches will be selected.

Department

By default all departments are checked, services in PCMs that have those branches will be selected.

Analysis Tab (PCM)

PCM Analysis

The top two rows of this tab are the 6 PCM Analysis codes. These are PCM header level selections.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user's company's system.

Service Tab

Service Date From/To

The service date(s) of the services to be selected.

Supplier From/To

Used to select services with a specific, or range of, supplier code(s) matching the selection.

Master Suppler From/To

Used to select services with a specific, (or range of) Master Supplier code(s) matching the selection.

NOTE: When a Master Supplier (or range of) Master Suppliers is entered in these fields, Tourplan will find those services whose supplier(s) have the Master Suppliers attached to them. When searching on the Master Supplier fields, the Supplier fields should be left blank.

Service Status

By default, all service statuses are checked and services that are this status will be selected. Un-check those statuses that are not required.

Service

Used to select services with a specific, (or range of) service code(s) matching the selection.

Location

Multi select checkboxes are used to select services in a specific location. (By default All checkboxes are selected).

Analysis Tab (Supplier Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier level selections attached to the service.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected

The cell to the right of this heading will provide you with the number of PCM services that have been selected.

Found

The system will provide you with the number of services found, matching the filter criteria.

Select All/Unselect All

Select all services found, or un-select all services selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Supplier Messaging, see "Bulk Documentation" on page 253.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Selected check boxes

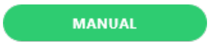
Services can be individually selected.

Save Filters for Supplier Messages

The save filters feature of Bulk Supplier messaging allows users to save common or frequently used Supplier Message filters. If filters are saved a list of pre-saved messages are given a description which will be used for easy identification for users to know the messages' intended use.

Save Filters for Supplier Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > PCM Quotes > Supplier Messaging**.
2. Click **Manual**.

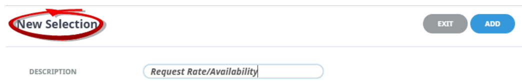


3. On the blank Bulk Supplier Messaging - Manual Selection screen, the **Service Tab** will open. Select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (PCM and Agent)**, **Service Tab** and the **Analysis Tab (Supplier and Product)**.

   View Supplier Messaging Filter Selections to learn more about all the field selections available, or view the individual tab filters: PCM Tab, Analysis (PCM and Agent), Service, Analysis (Supplier and Product), Results.

   NOTE: There are two tabs with the heading Analysis: the Analysis Tab on the left refers to the PCM or Agent Analysis field selections, whereas the Analysis Tab on the right refers to Supplier and Service Analysis field selections.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selection a *Description*.



8. Click **Add** to add this filter description.

9. Click **Exit** to discard any changes.

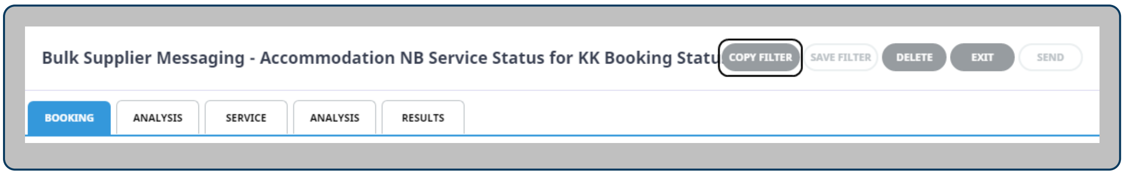
   NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the description will display each time a user opens Bulk Supplier Messaging. If selected for future Bulk Supplier Message sending, results will be returned based on the saved filters.
10. If **Add** is selected the results screen will re-display, where you can select to **Send** messages (following from Step 5 in the previous procedure), or **Exit**.

The procedures just described are sufficient to create manual filter criteria to send bulk supplier messages from PCMs, and to save filters for future use. There are many unique filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

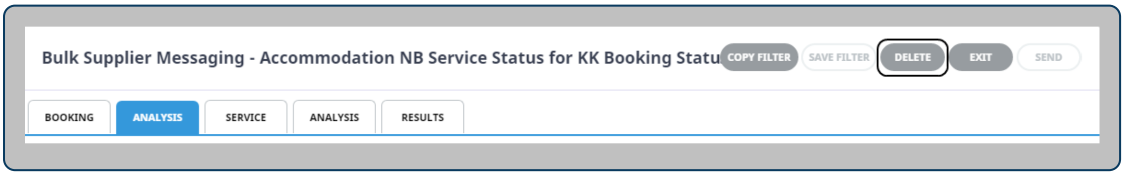
Copy Supplier Messaging Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new Description from within the Results Tab. Users can copy existing filters by using **Copy Filters** - make the necessary changes to filter selection. Re-saving will give the newly copied filters a New Description.



Deletion of Supplier Messaging Filter Descriptions

Deletion of Filter Descriptions is allowed and no warning message will display. The system will allow you to delete if the Filter Description is no longer required.



PCM Agent Messaging

Bulk Messaging allows messages to be sent in bulk to Agents. The messages selected and sent can cover multiple bookings. Concurrently, the status of the services that have had messages sent can be updated.

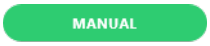
NOTE: Bulk Messaging will not suit all companies. This function is typically used where agent messaging is consolidated (either by user or company) and output at specific times or at end of day.

The selection criteria of frequently sent messages can be saved and recalled. If saved, a list will display when the Agent Messaging menu has been selected. Filters can be copied and saved from within the Bulk Agent Messaging screen.

Create Manual Agent Messaging Filters and Send Messages

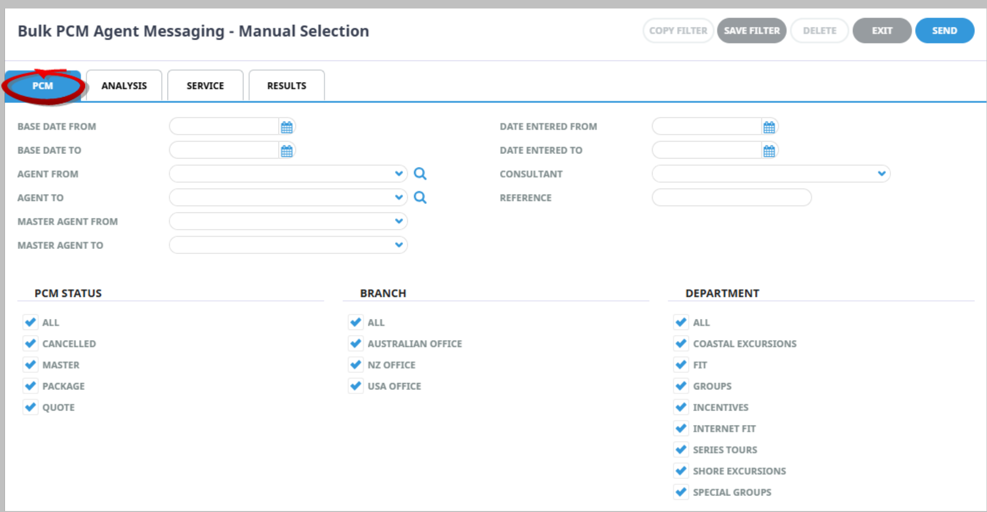
1. From the Home menu, select **Home > Operations > Bulk Documentation > PCM Quotes > Agent Messaging**.

2. Click **Manual**.

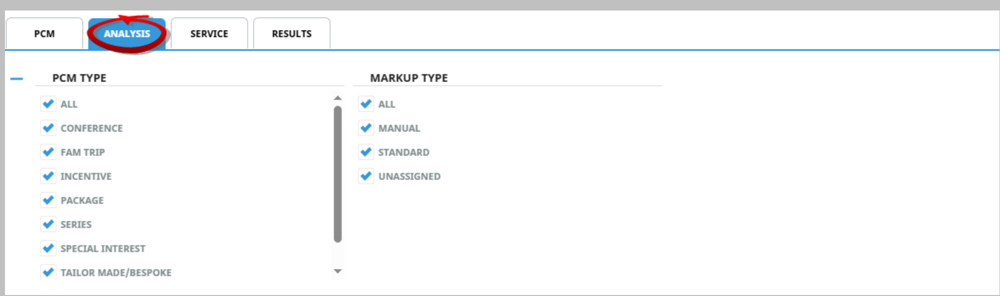


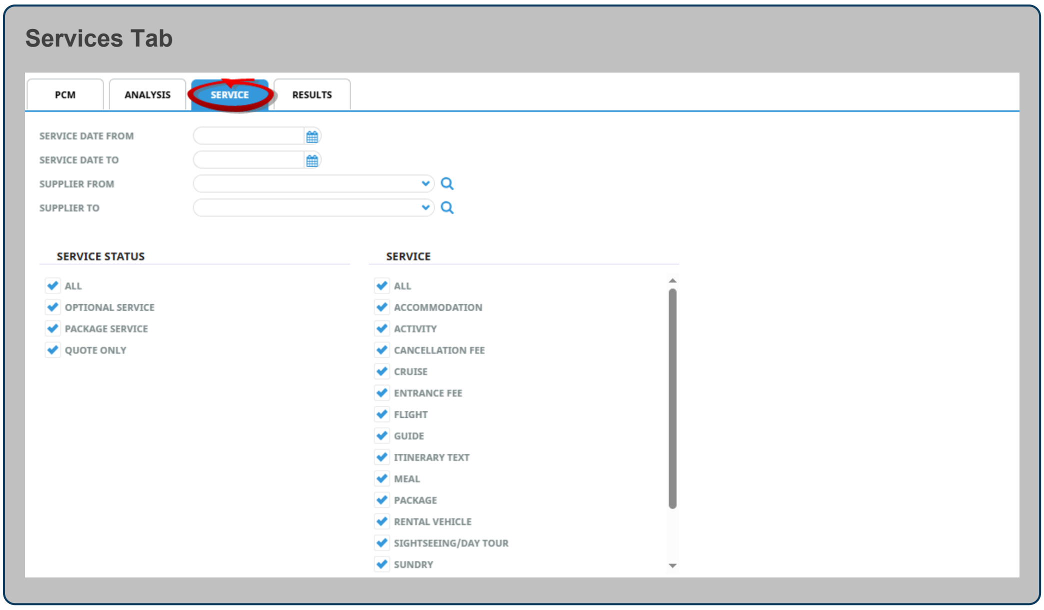
3. On the blank **Bulk PCM Agent Messaging - Manual Selection** screen, the **PCM Tab** will open, select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (PCM)** and the **Service Tab**.
View Agent PCM Filter Selections to learn more about all field selections available, or view the individual tab filters: PCM, Analysis (PCM), Service or Results.

PCM Tab



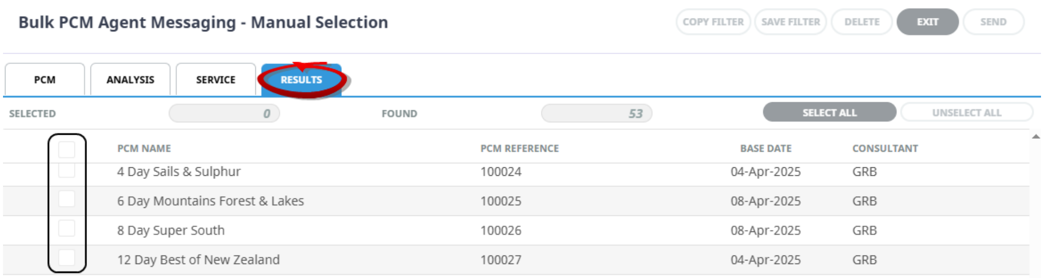
Analysis Tab





4. Check the **completed screens**.

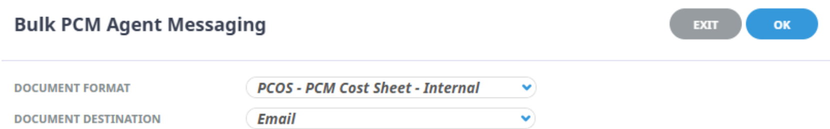
5. Click on the **Results Tab**. Select the services using the **Selected check box** next to each service, or use **Select All**.



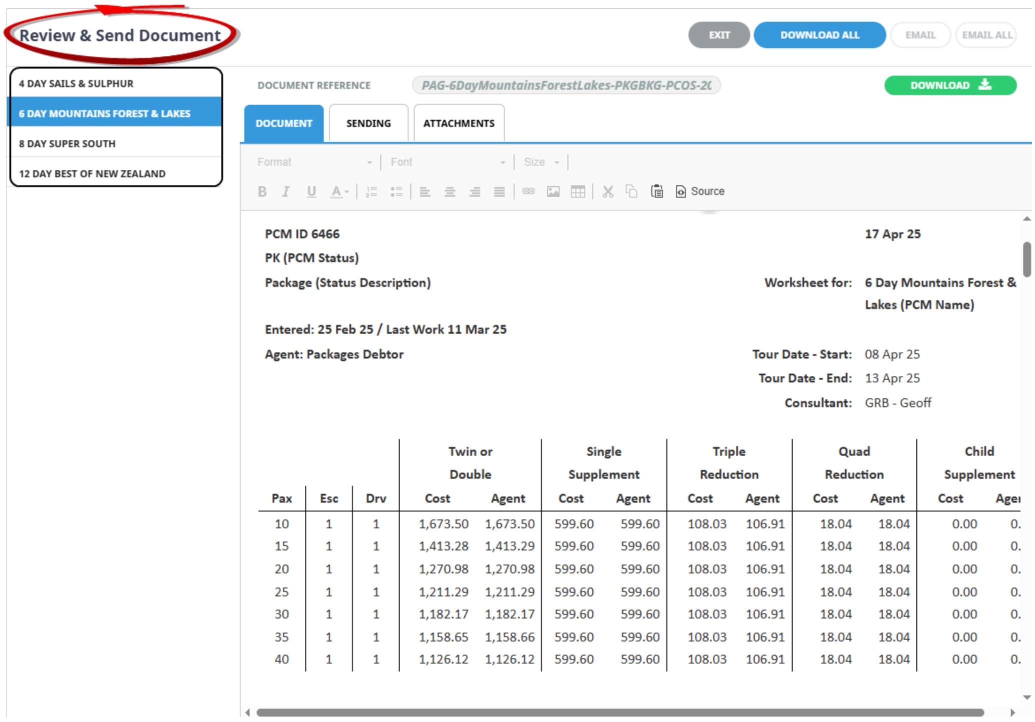
6. To send the messages, click **Send**.

7. Click **Exit** to discard any changes.

8. If Send is clicked, the **Bulk PCM Agent Messaging** screen will display. Select the **Document Format**, and the **Document Destination**.

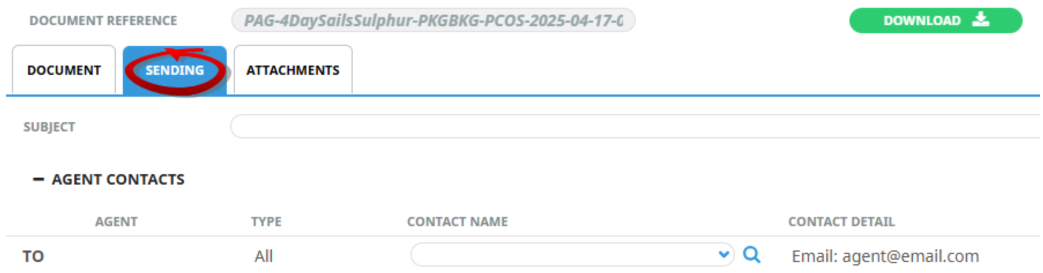


9. If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.



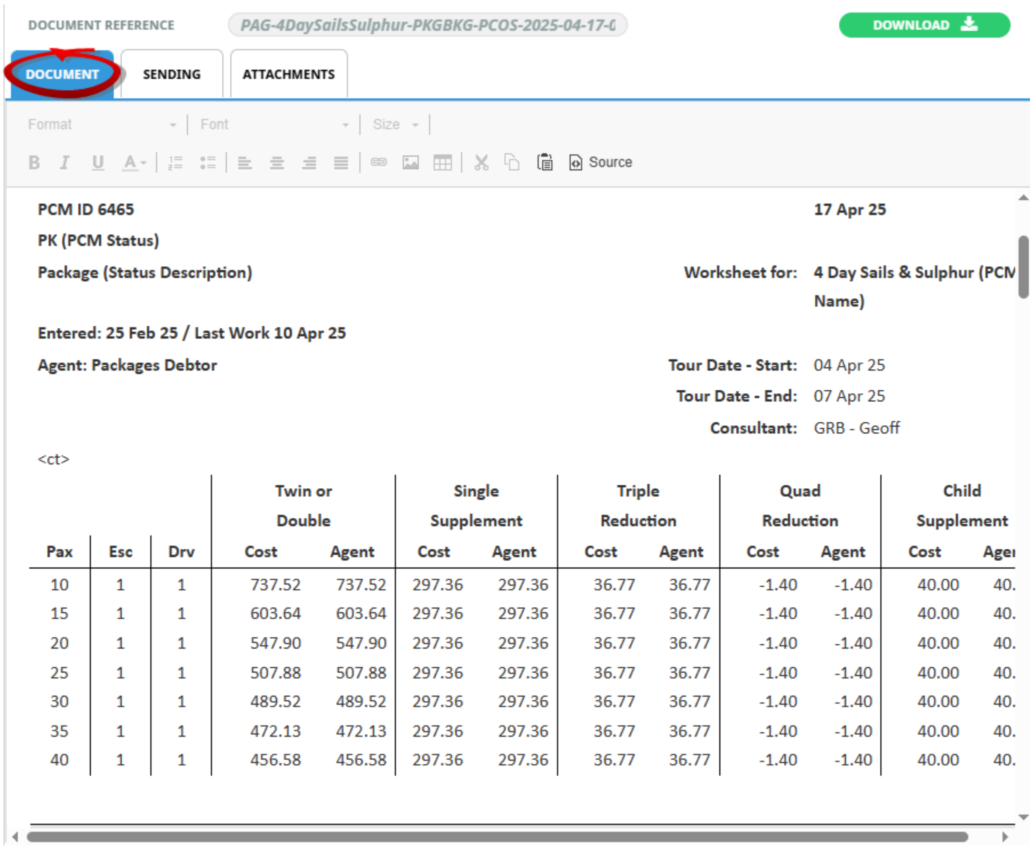
			Twin or Double		Single Supplement		Triple Reduction		Quad Reduction		Child Supplement	
Pax	Esc	Drv	Cost	Agent	Cost	Agent	Cost	Agent	Cost	Agent	Cost	Agei
10	1	1	1,673.50	1,673.50	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.
15	1	1	1,413.28	1,413.29	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.
20	1	1	1,270.98	1,270.98	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.
25	1	1	1,211.29	1,211.29	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.
30	1	1	1,182.17	1,182.17	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.
35	1	1	1,158.65	1,158.66	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.
40	1	1	1,126.12	1,126.12	599.60	599.60	108.03	106.91	18.04	18.04	0.00	0.

10. The **Sending Tab** will open if the Email and Sending tabs were activated when the message template was setup to send as an email. The Sending tab allows you to view the email text that will be sent and the contact name and address the email is sending to.



NOTE: A contact will default from the coding in the message template, however an alternative contact name can be selected using the drop down arrow. The options for CC, and BCC are also available. A list of Contact names attached to the Agent will display in a dropdown, or an alternative (or manual contact) email address can be entered using the search button.

11. On the **Document Tab**, you can examine the generated document or **Download** it.

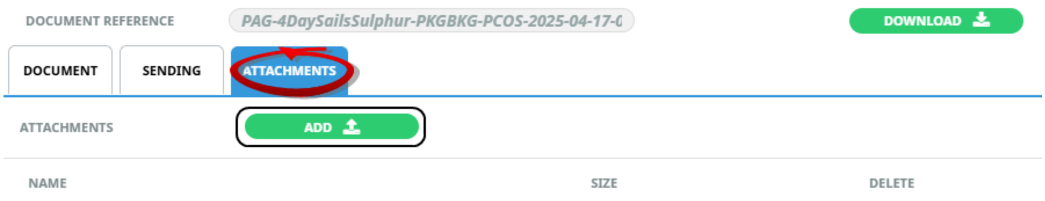


			Twin or Double		Single Supplement		Triple Reduction		Quad Reduction		Child Supplement	
Pax	Esc	Drv	Cost	Agent	Cost	Agent	Cost	Agent	Cost	Agent	Cost	Agei
10	1	1	737.52	737.52	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.
15	1	1	603.64	603.64	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.
20	1	1	547.90	547.90	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.
25	1	1	507.88	507.88	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.
30	1	1	489.52	489.52	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.
35	1	1	472.13	472.13	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.
40	1	1	456.58	456.58	297.36	297.36	36.77	36.77	-1.40	-1.40	40.00	40.

NOTE: A document can be downloaded from any of the tabs within Review & Send Documents.

Download will open the document in Microsoft Word. Any amendments made to the document in Word will not be saved unless the document is uploaded back into Tourplan.

12. On the **Attachments Tab**, click **Add** to add additional attachments to send with your email.



NOTE: If the Message Template has been configured to send attachments, a list of attachments will show on screen.

13. Click **Email** to send the document.

NOTE: '**Email All**' will only be available if each listed service has an email address allocated.

14. Click **Exit** to discard any changes.

About Bulk Agent Messaging Fields

Filter selection combinations are dependent on user's company's requirements. Selection of any filter combinations will return results in the Results Tab.

There are 4 Tabs that include field filter selections:

- PCM Tab.
- Analysis Tab (PCM).
- Service Tab.
- Results Tab.

PCM Tab

Base Date From/To

Used to select PCMs with a specific, or range of, base dates.

Agent From/To

Used to select PCMs with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Master Agent From/To

Used to select PCMs with a specific, (or range of) Master Agent code(s) in the booking header matching the selection.

Date Entered From/To

The PCM entered date(s) of the PCMs to be selected.

Consultant

The consultant code attached to the PCM whose messages are to be output.

Reference

The reference attached to the PCM that message is to be output from. This field will only accept the actual reference number. The Branch/Department components of the PCM reference are selected from the Booking Branch and Booking Department multi select boxes.

Booking Status

By default, all booking statuses are checked and PCMs that have this status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and PCMs that have those branches will be selected.

Department

By default all departments are checked, PCMs that have those departments will be selected.

Analysis Tab (PCM Analysis)

PCM Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this user manual will vary and will display what has been setup in each user's company's system.

Service Tab

Service Date From/To

The service date(s) of the services to be selected.

Supplier From/To

Used to select services with a specific, or range of, supplier code(s) matching the selection.

Service Status

By default, all service statuses are checked and services that are this status will be selected. Un-check those statuses that are not required.

Service

Used to select services with a specific, (or range of) service code(s) matching the selection.

Results Tab

Selected

The cell to the right of this heading will provide you with the number of PCMs that have been selected. (The screen capture above is showing that 0 services have been selected).

Found

The system will provide you with the number of PCMs found matching the filter criteria.

Select All/Unselect All

Select all services found, or un-select all PCMs selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Agent Messaging, see "Bulk Documentation" on page 253.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Selected check boxes

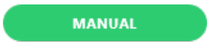
PCMs can be individually selected.

Save Filters for Agent Messages

The save filters feature of Bulk Agent messaging allows users to save common or frequently used Agent Message filters. If filters are saved a list of pre-saved messages are given a description which will be used for easy identification for users to know the messages' intended use.

Save Filters for Agent Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > PCM Quotes > Agent Messaging**.
2. Click **Manual.**

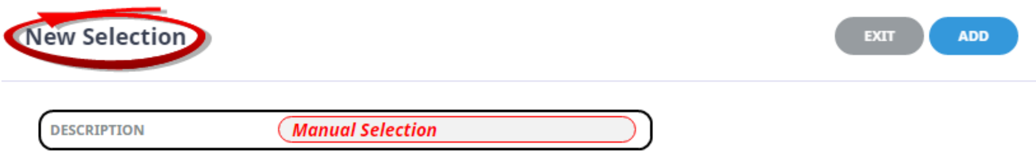
3. On the blank Bulk Agent Messaging - Manual Selection screen, the **PCM Tab** will open. Select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (Booking and Agent)** and the **Service Tab**.

   View Agent PCM Filter Selections to learn more about all field selections available, or view the individual tab filters: PCM, Analysis (Booking and Agent), Service or Results.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selection a **Description**.

   NOTE: The description will automatically default to the description name 'Manual Selection': simply over-type with the required text.

8. Click **Add** to add this filter description.

9. Click **Exit** to discard any changes.

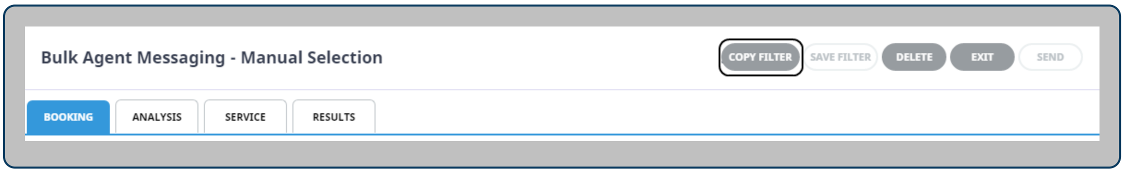
   NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Agent Messaging, if selected for future Bulk Agent Message sending results will be returned based on the saved filters.
10. If **Add** is selected you will return to the results screen, where you can select to **Send** messages (following from Step 5 in the previous procedure), or **Exit**.

> i The procedures just described are sufficient to create manual filter criteria to send bulk agent messages from, and to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

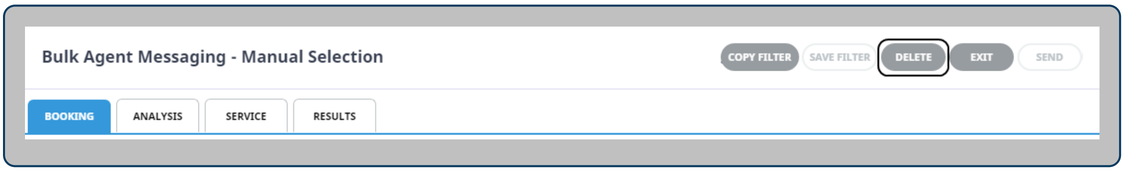
Copy Agent Messaging Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Results Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Agent Messaging Filter Descriptions

Deletion of Filter Descriptions is allowed, and no warning message will display. The system will allow you to Delete if the Filter Description is no longer required.



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CHAPTER 3

Booking Operations

Booking operations is an application that contains booking operation utilities. Not all companies will use all of these functions: usage will be dependent on which aspects of the Tourplan system a particular company has a need for.

Services can be substituted, and bulk replacement of one service in a range of bookings with different services can be completed. There is also a Book On function where FIT bookings are selected that have a specific book on package for a specific date: the book on application allows the FIT bookings to create one group booking. Recalculation of the Booking or Services can be done in bulk from the Booking Operations applications.

Operations also offers a queue management function where filters can be set to view and act on queues from across the system. This allows messages to be actioned and generated for entities that the queued message is associated with.

In this chapter ...

Substitute Service

The Substitute Service facility allows a service to be replaced in bookings, in bulk, with an alternative service, without having to open each booking individually.

This can be useful when (e.g.) a decision has been made not to use a particular service from a certain date, and an arrangement has been made to use another service from that date. Similarly if a supplier closes down and bookings already exist that have that supplier's service in it, a replacement service can be entered into the bookings in bulk.

NOTE: Services will not be substituted if:

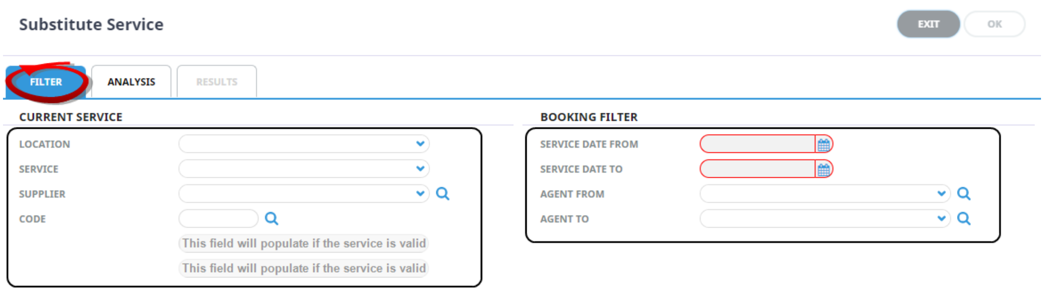
- One of the selected services in a booking is closed.
- A selected service is in an FIT booking as part of a 'Book On' package.
- A selected service is in an FIT booking as a 'Sell on Request' package, and the replacement service is not set up in the package as a valid substitutable service.
- The replacement service is the same as the original service.
- The service category is different from the original service category.
- The location of the service is different from the original service location.
- The original service has a Special Offer Fixed Nights or Extra Nights service.

Substitute Service

1. From the Home menu, select **Home > Operations > Booking Operations > Substitute Service**.

2. On the blank **Substitute Service** screen, the **Filter Tab** will open, in the 'Current Service' section, select the *Location*, *Service*, *Supplier*, and enter the *Service Code*. Select the required *Service Date From/To* dates.

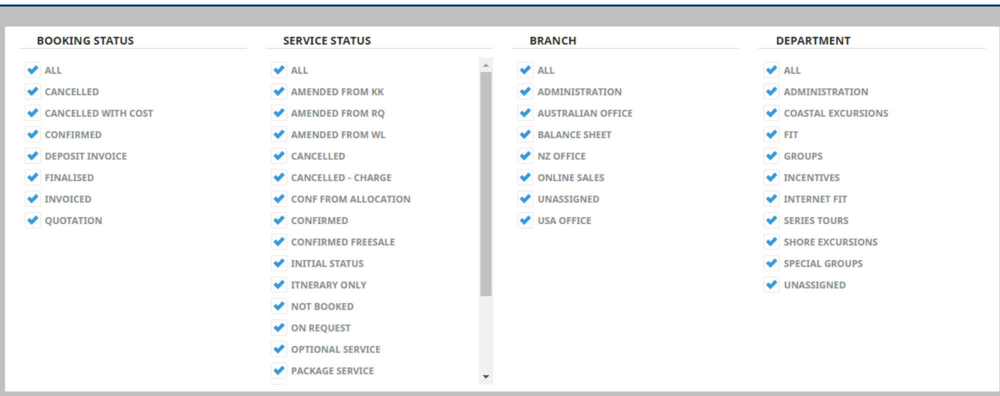
   NOTE: All 'Current Service' fields are to be completed, manual entry of the Service type is required, the Description and Comment fields from the product option will populate if a valid service has been selected. The Booking Filter **Service Date From/To** fields are mandatory, the results tab will not return results until these two fields have dates applied.



3. Keeping with the **Filter Tab**, services to be substituted can be filtered using *Booking Status*, *Service Status*, *Branch* and or *Department*. If applicable, select the required filters.

Filter Tab

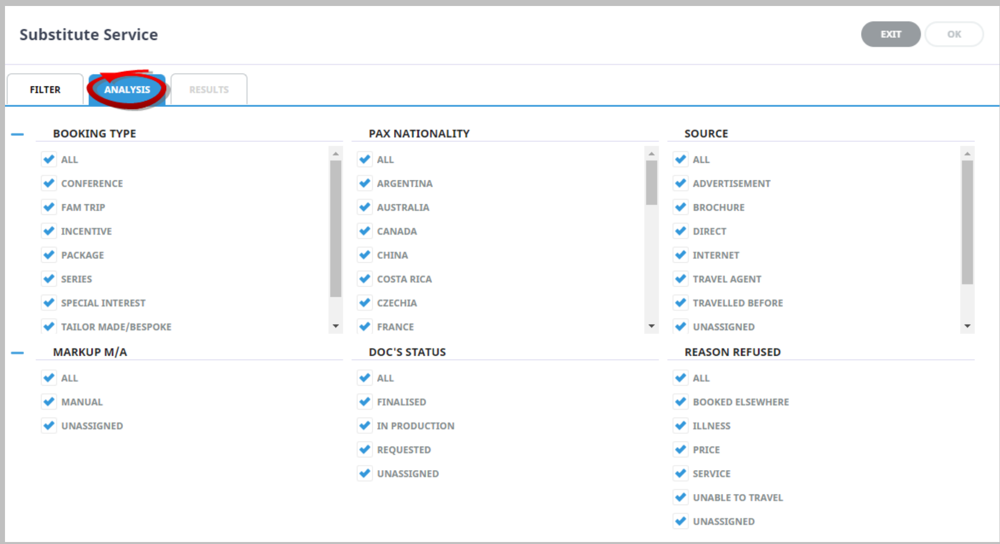
Filters used in this screen capture are examples used for Training purposes, Status Branch and Department selection will reflect users own organisational fields.



4. Click on the **Analysis Tab** a selection of current services can also be made from 6 of the Booking Header Analysis Codes. If required select the applicable *Analysis Codes*.

Analysis Tab

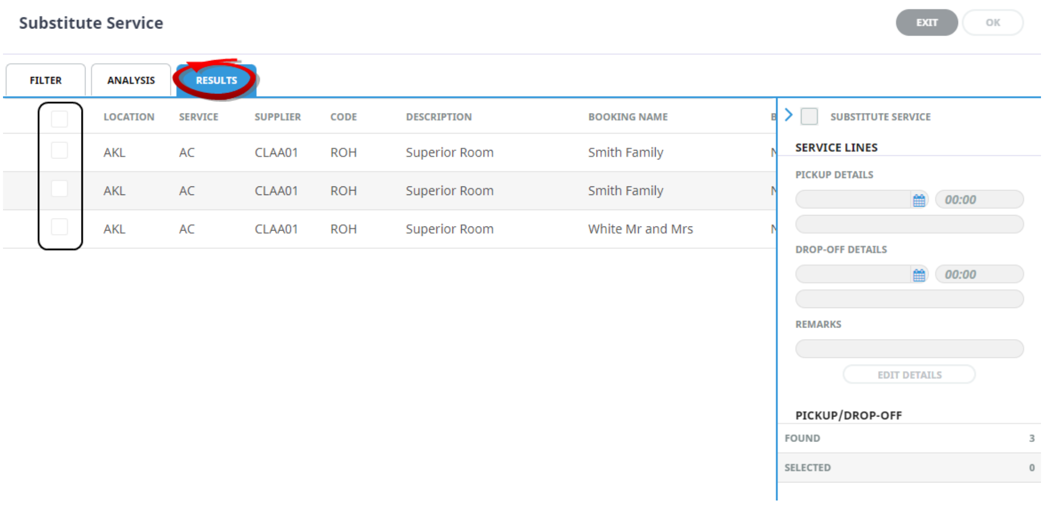
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



5. Check the **completed screens**.

6. Click on the **Results Tab**. Select the services using the **Select check boxes** next to each service, or use **Select All**.

NOTE: The Substitute Service check box will become active when services are selected.

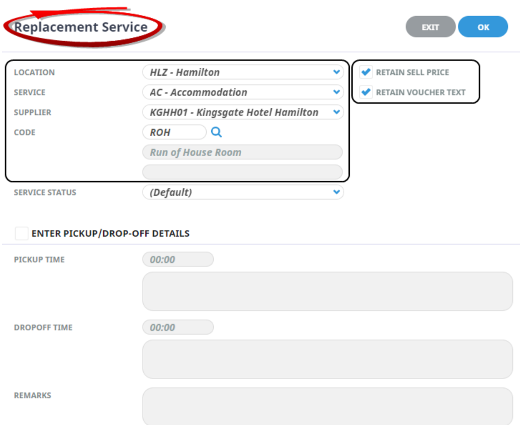


7. Click **OK** to keep the changes and save or update the entry.
8. On the blank **Replacement Service** screen, select the *Location*, *Service*, *Supplier*, and enter the *Service Code* for the Replacement Service.

   NOTE: All 'Replacement Service' fields are to be completed, entry of the (product) Code is required. The Description and Comment fields from the product option will populate if a valid product has been selected.

9. If required un-select *Retain Sell Price* and *Retain Voucher Text* check boxes.

   NOTE: By default the Retain Sell Price and Retain Voucher text check boxes are selected, users are to un-select if the replacement service is **not** to use the current service sell price or voucher text attached to the service itself or product rate.

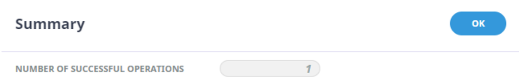


11. Keeping with the **Replacement Service** screen, select *Service Status*.

12. Click **OK** to keep the changes and save or update the entry.

13. Click **Exit** to discard any changes.

14. If '**OK**' was selected a Summary will appear with the number of successful services to be updated.

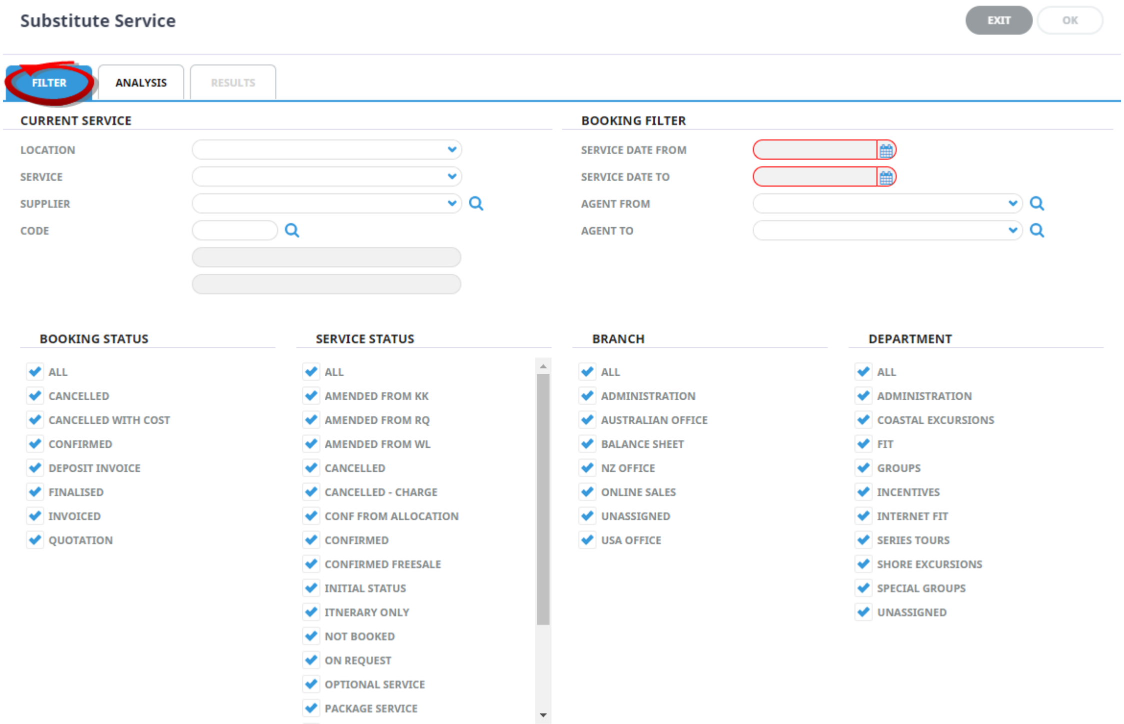


15. Click **OK** to exit the modal.
16. **Substitute Service** screen will re-display select **Exit** to close.

About Substitute Service Fields

Filter Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes options to select Booking Status, Service Status, Branch and or Department.



Current Service Fields

The 'Current Service' selection, uses drop downs to select Location, Service, Supplier code for the service that is to be replaced. The (product) Code is to be inserted manually.

When a valid service has been selected the grayed fields below the Code will populate with the product description, and comments if used for the service.

NOTE: If data does not display in the fields below the Code then incorrect detail has been entered.

Booking Filter

Service Date From/To

The selected current service can be filtered based on the date of the service, this is a mandatory field entry.

Agent From/To

Services in bookings with a specific agent or range of agents can be selected.

Booking Status Section

Check the boxes alongside the booking status(es) which are to be included in the filter. e.g., if bookings with a cancelled status are not to be included, uncheck the cancelled status checkbox.

Service Status Section

Check the boxes alongside the service status that are to be included in the filter, e.g., if bookings with a cancelled status are not to be included, uncheck the cancelled status(es) checkbox(es).

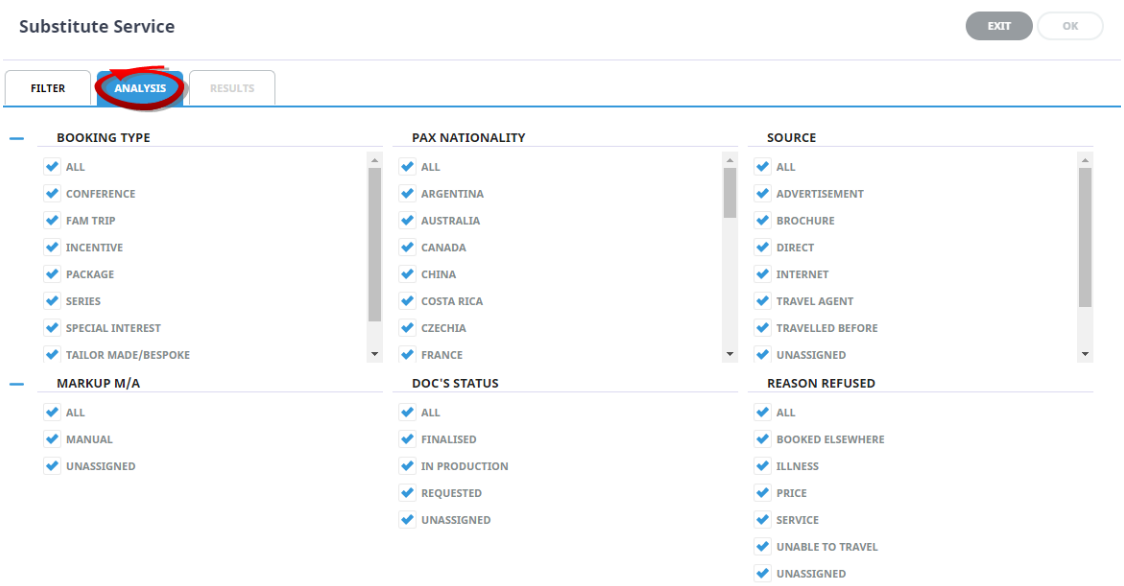
Booking Branch Section

If only bookings for specific Branch(s) need to have the service substituted, check the appropriate box(es).

Booking Department Selection

If only bookings for specific Department(s) need to have the service substituted, check the appropriate box (es).

Analysis Tab (Booking Analysis)



Analysis Codes

The selection of the current service can also be made based on the six booking header Analysis Codes.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or check boxes, see the System Setup User Manual.

Results Tab

Selected check boxes

Services can be individually selected.

Select All/Unselect All

Select all services found, or un-select all services selected.

Service Lines

Pickup and Drop-Off details will display if the service has this information previously attached to the service. The pick up and drop off information can be updated here by completing the required fields and selecting 'Edit Details'.

Found

The system will provide you with the number of services found, matching the filter criteria.

Selected

A numerical value showing the number of services that have been selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Substitute Services, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Replacement Service Selection

These fields are where the detail of the replacement service is entered.

Use the drop-downs or enter the codes to select the Location, Service and Supplier of the replacement service to be used. Enter the (product) Code manually.

NOTE: If data does not display in the fields underneath the drop-down or (product) Code field(s), then incorrect detail has been entered—i.e., the (product) Description should display underneath the (product) Code field.

Service Status

This field is defaulted to 'Default', however if a service status is selected here the system will update the service status in the booking(s) at the time of replacing the service.

Retain Sell Price

When checked, the system will adjust the cost price of the service in the booking to reflect the cost price of the replacement service. However, the sell price from the current service will be held against the replacement service. This feature is useful when an original selling price of bookings needs to be maintained.

Retain Voucher Text

When checked, any voucher text (entered at either service or rate level) will be written into the replacement service line. This feature is useful if booking specific voucher text has been entered against the current service and these details are the same for the replacement service.

Enter Pickup/Drop-off Details

Existing pick up and drop off details will store within the replaced service if the pick up and drop of fields were used in the initial booking.

NOTE: To amend pick up and drop off details for the substituted service select the 'Enter Pickup/Drop-off Details' check box and insert information into the; Pick up Time, pick up text, Drop off Time, drop off text, and Remarks text. This information will then be updated alongside substituted service pick up/drop off fields within the booking.

Update Pickup & Dropoff

Bulk updates to pick up and drop off times for services can be achieved when using the Booking Operations function Update Pickup and Drop off. Some organisations may need the facility to locate or update a number of services at once.

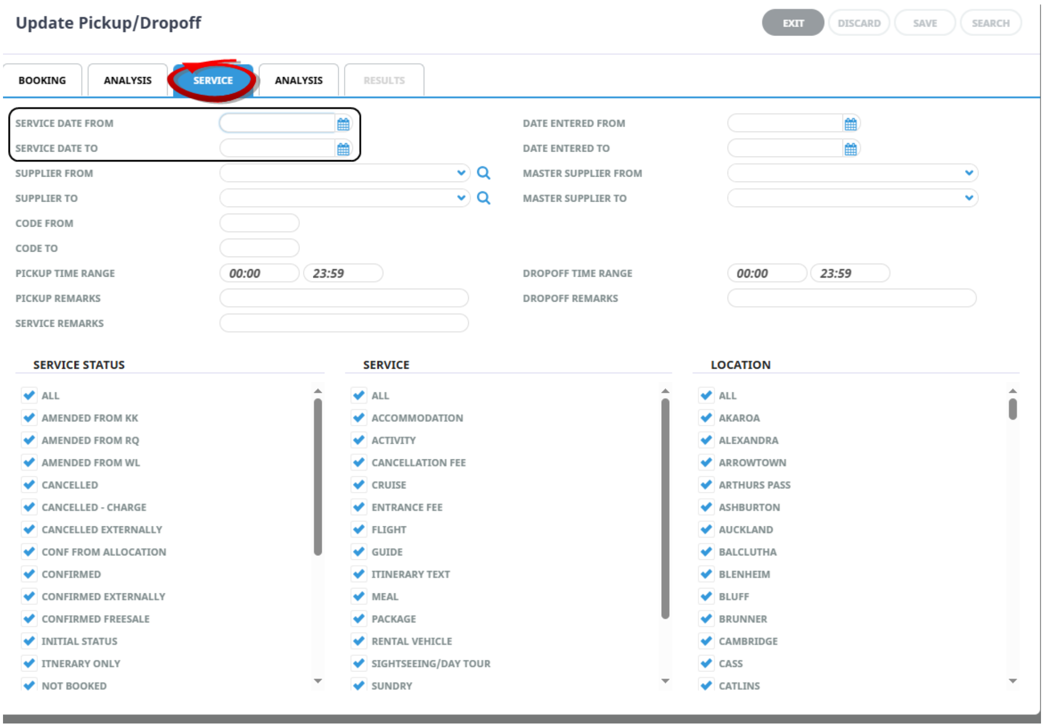
The Update Pick up/Drop off menu option allows users to set filter options to return required results, and amendment to pick up/drop off points or times can be performed to multiple services across multiple bookings.

Updating Pick Up & Drop Off Details

1. From the Home menu, select **Home > Operations > Booking Operations > Update Pickup and Dropoff**.

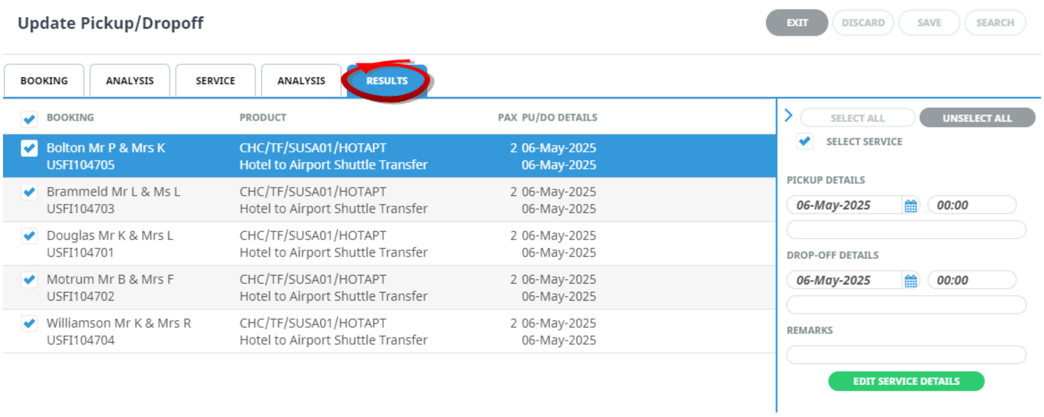
2. On the blank **Update Pickup/Dropoff** screen, the **Service Tab** will open, select fields to narrow the search filter results.

   NOTE: '**Save**' will enable when the **Service From/To** fields have dates selected. Further filter selections are available from the following tabs *Booking Tab*, *Analysis Tab* (Booking), *Service Tab* and *Analysis Tab* (Service).

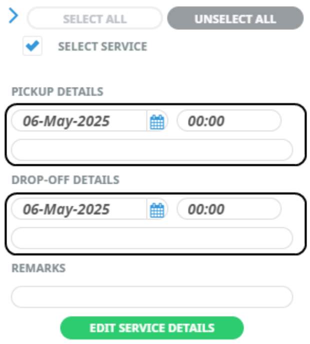


3. Check the **completed screens**.

4. Click on the **Results Tab**. Select the services to update. There are three ways to select:
   a. Using the **check-box**.
   b. Or clicking on the **Booking Service**.
   c. If all services are to be updated, use **Select All** for bulk selection.



5. Update the **Pick Up/Drop Off** details on the right of the screen.



6. Or click **Edit Service Details**, to enter the Pickup and Drop off details.

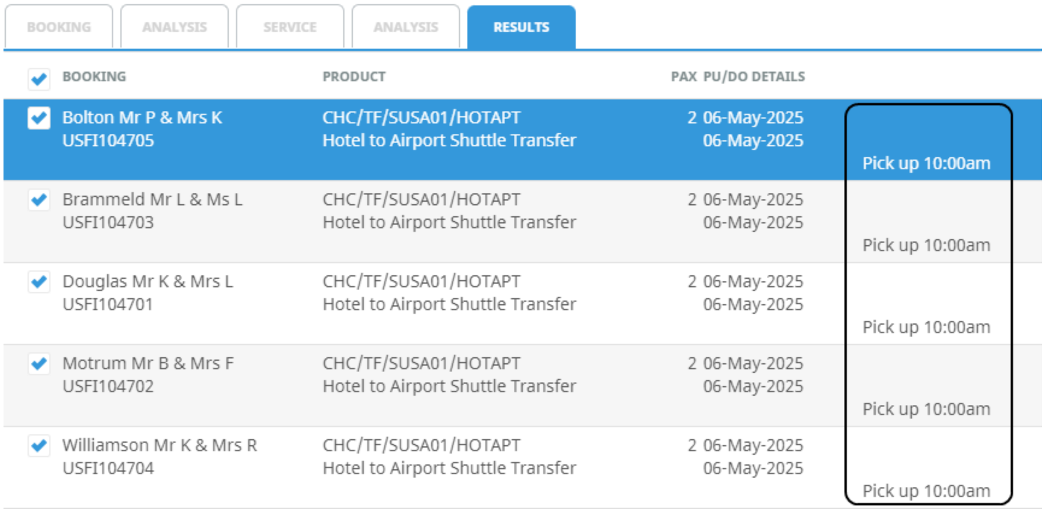
   a. Click **OK** to keep the changes and save or update the entry.

7. Click **Save** to keep the changes.

8. Click **Exit** to discard any changes.
9. If **Save** was selected a Summary will appear with the number of successful bookings to be updated.

10. Click **OK** to exit the modal.

11. The **Update Pick Up and Drop Off** Results tab will re-display, the service details will have updated and can be viewed from here.



About Update Pick Up/Drop Off Fields

Service Tab

Service Date From/To

NOTE: Mandatory field selection to trigger the Save button activation.

This is the date of the service within a booking. Selection for a range of dates is entered here Pick Up and Drop off details for services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Pick up and Drop off details with a specific, or range of, supplier(s) codes matching the selection.

Code From/To

This is the service code or range of service codes.

Pick up Time Range

Used to select a range of pick up times for services that fall within the time range provided.

Pick up Remarks

Used to select specific pick up points selected in the booking.

Service Remarks

This selection can be used to filter by specific remarks stored within the service.

Date Entered From/To

This is the date the booking was entered. If selection for a range of dates is entered here Pick up and Drop off details for bookings that were created within the date range provided will be display in the results screen.

Master Supplier From/To

Used to select Master Suppliers with a specific, or range of, Master Supplier code(s) matching the selection.

Drop off Time Range

Used to select a range of drop off times for services that fall within the time period provided.

Drop off Remarks

Used to select specific drop off points selected within the booking.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked and Queue Messages for those service types that have been selected will return results.

Location

Multi select checkboxes to display results for services in the booking matching the locations selected - by default all Locations are selected. (Un-check Locations which are not required)

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

Booking Tab

Travel Date From/To

Travel date for bookings is the date that appears in the header of a booking this is generally the date of the first service. This date range field is used to select bookings with a specific date, or Pick up and Drop off details for bookings that fall within a range of travel dates.

Booking Name

This is the name of the booking that appears in the header of a booking.

Booking Ref From/To

Used to select a specific booking reference or range of references.

Agent From/To

Used to select Pick up and Drop off Details with a specific, or range of, agent(s) codes in the booking header matching the selection.

Consultant

Selecting this field will filter bookings by the consultant code attached to the booking.

Last Service Date From/To

Used to filter by the date of the last service or range of dates.

Date Entered From/To

This is the date the booking was entered. If selection for a range of dates is entered here Pick up and Drop off details for bookings that were created within the date range provided will be display in the results screen.

Booking Type

Used to filter by booking type, FITs, Groups or All booking types.

Master Agent From/To

Used to select Pick up and Drop off details with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Currency

Used to select bookings with a particular booking currency.

Booking Status

By default, all booking statuses are checked and services in bookings that have those status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and services in bookings that have those branches will be selected.

Department

By default all departments are checked, services in bookings that have those branches will be selected.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes.

Service Analysis

The bottom two rows of this tab are the 6 Product (Service) Analysis codes. These are Product Analysis codes attached to the Service.

Analysis fields can be expanded or minimised by using the + or - function.

Bulk Service Insert

This feature allows users to insert a service into multiple bookings using a bulk service insert process. Filters are applied to display a list of booking results, allowing users to manage the insert of a service into selected bookings.

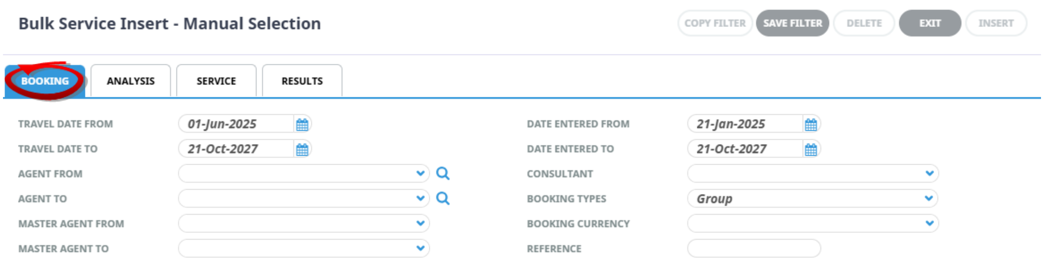
Users can view standard product options and select one product at a time to insert. The day sequence must be specified for the search, which will then be used to insert into each booking based on the day number. When the "Add Service" operation is performed, it is inserted using the Day and Sequence number from the initial selection.

> For group bookings with more than one itinerary, users can select an itinerary to insert the service. When multiple bookings are selected the data is automatically populated from the first booking selected. Any pricing or rate values are generated based on the Pax details from the first selected booking.

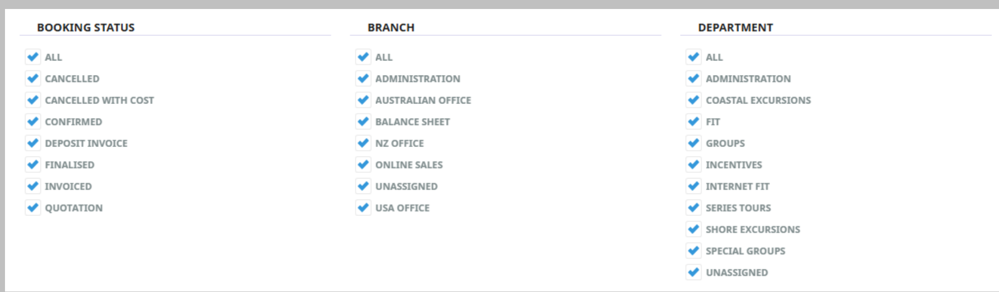
Bulk Service Insert

1. From the Home menu, select **Home > Operations > Booking Operations > Bulk Service Insert**.

2. On the blank **Bulk Service Insert - Manual Selection** screen, the **Booking Tab** opens. Complete the fields necessary to filter a list of Booking results. .

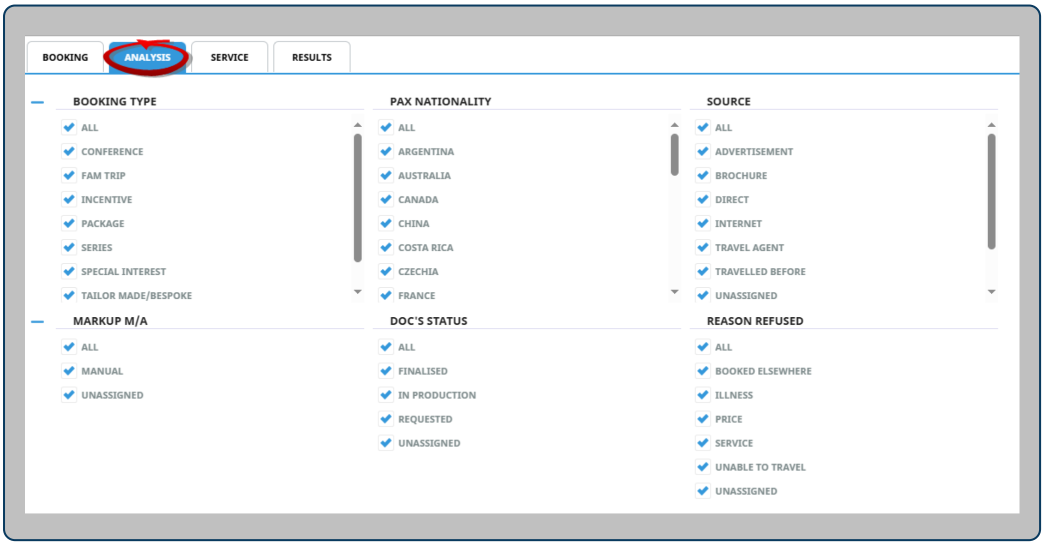


3. Keeping with the **Booking Tab**, Bookings can be filtered by 'Booking Status', 'Branch' and or 'Department'. If applicable, select the required filters.

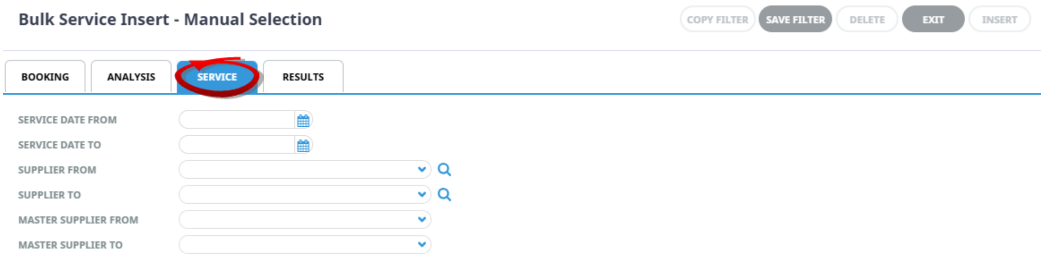
> Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.
>
> 
>

4. Click on the **Analysis Tab**, selection of current Bookings can also be made from 6 of the Booking Analysis Codes. If required select the applicable 'Analysis Codes'.

> Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



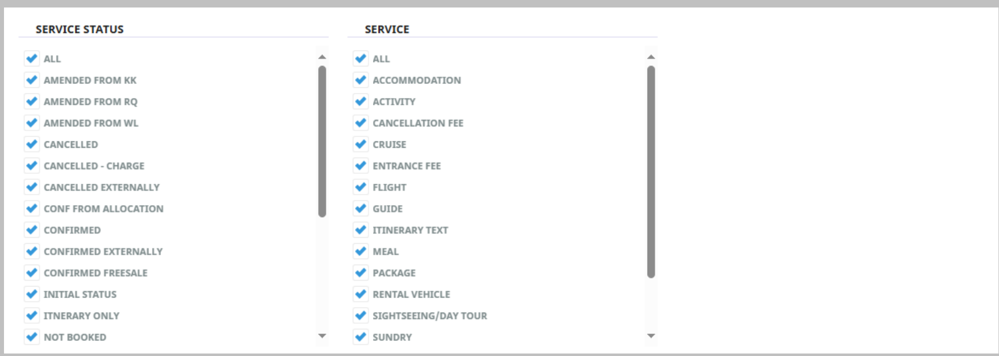
5. Click on the **Service Tab**, select a *Service Date From/To*, *Supplier*, *Master Supplier*, or *Location* to filter Bookings with specific Services.



6. Keeping with the **Service**, Bookings can be filtered using *Service Status*, *Service Type*.

Service Tab

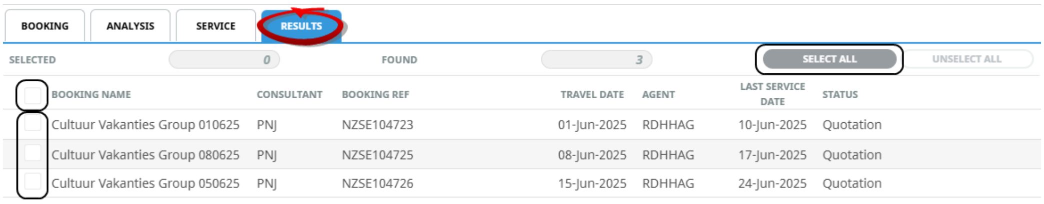
Filters used in this screen capture are examples used for Training purposes, Service Status, Service Type selection will reflect users own organisational fields.



7. Check the **completed screens**.

8. Click on the **Results Tab**. Select the Bookings using the 'Selected check boxes' next to each Booking, or use 'Select All'.

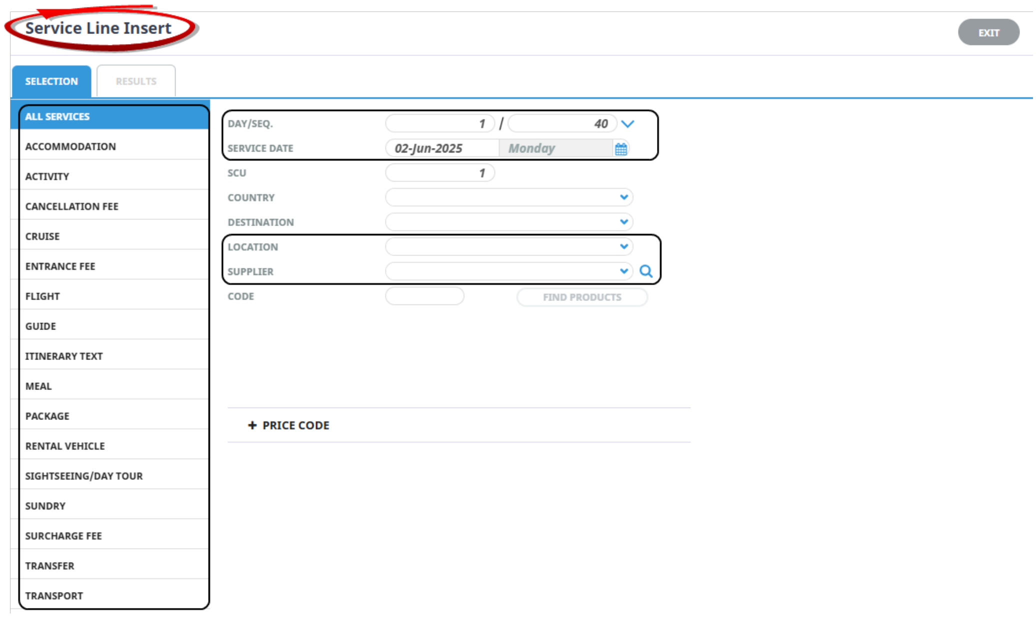
NOTE: The Insert Button will become active when Bookings are selected.



9. Click **Insert** to add a new entry.

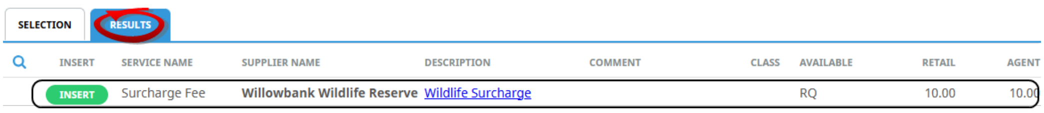
10. On the blank **Service Line Insert** screen, select a 'Location' or 'Supplier' and a 'Service Type' to search for Product.

NOTE: To insert the service mid itinerary adjust the Day/Seq fields to show the correct values, the Service Date will update if Day/Seq fields are edited. If the Service Date is edited the Day/Seq will automatically update.



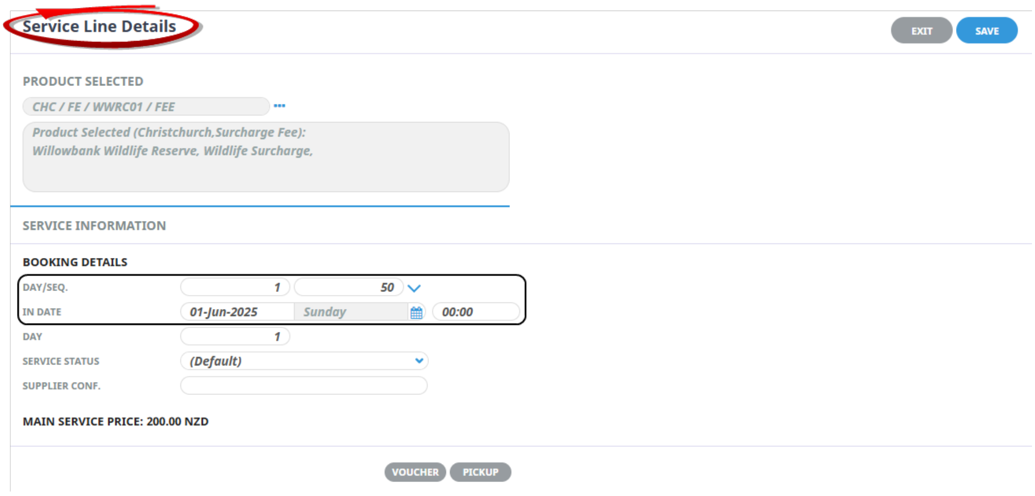
11. Click **Find Products**.

12. On the **Results tab**, select the service to insert into the Bookings.



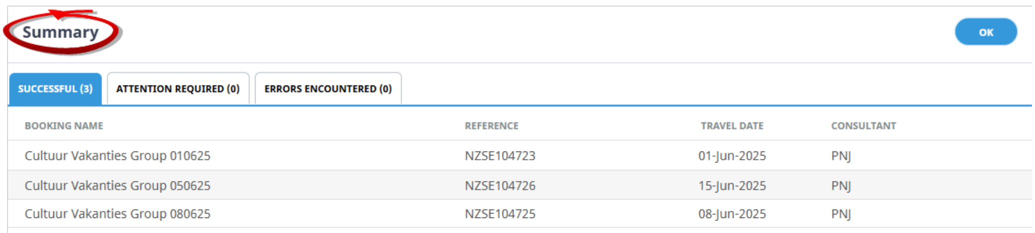
13. Click **Insert** to add a new entry.

14. The **Service Line Details** screen opens with the Product Selected, check the completed screen. If pickup and drop off details are known they can be edited here.



15. Click **Save** to keep the changes.

16. Click **Exit** to discard any changes.
17. If '**Save**' was selected a Summary will appear with the number of successful Bookings updated.



18. Click **OK** to exit the modal.
19. The Bulk Service Insert Results Tab will re-display select **Exit** to close.

About Bulk Service Insert Fields

There are some additional considerations with using this bulk service insert feature.

- Package and, non-accommodation package products cannot be inserted into multiple bookings.
- External Services are unable to display in the Insert Service Results screen and therefore cannot be inserted into multiple bookings.
- If a product rate has a Split Service, Rate Category for cross seasonal bookings - the bulk service insert process will insert a single service for the entire stay length.

Booking Tab

This is the default tab that will open when selecting to insert a service within multiple Bookings in a bulk update process.

Travel Date From/To

Travel Date for Bookings is the date that appears in the header of a Booking, this is generally the date of the first service. This date range field is used to select Bookings with a specific date, or a range of travel dates.

Agent From/To

Used to select Bookings with a specific, or range of, agent(s) codes in the Booking header matching the selection.

Master Agent From/To

This selection is used to filter Bookings with a specific, or range of, Master Agent(s) codes in the Booking header matching the selection.

Date Entered From/To

This is the date the Booking was created. If selection for a range of dates is entered here Bookings that were created within the date range provided will be display in the results screen.

Booking Types

Drop down selection for the type of bookings to be included, selection includes:

- Groups - those bookings that are Group bookings will be selected. (this is the default setting)
- FITs - those bookings that are FIT bookings will be selected.

Consultant

Selecting this field will filter Bookings by the consultant code attached to the Booking.

Reference

Used to select a specific Booking reference.

Booking Status

By default, all Booking statuses are checked and bookings that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all Booking branches are checked bookings that have those branches will be selected.

Department

By default all Departments are checked, bookings that have those branches will be selected.

Analysis Tab

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are Booking header level Analysis selections.

Service Tab

Service Date From/To

This is the date of the service within a Booking. If selection for a range of dates is entered here Bookings with services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Bookings with a specific, or range of, supplier(s) codes matching the selection.

Master Supplier From/To

This selection is used to find Bookings with a specific, or range of, Master Supplier(s) codes matching the selection.

Location

Use this field to find Bookings with services in the itinerary for a selected location.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Results Tab

Selected check boxes

Bookings can be individually selected.

Selected/Found Fields

These fields are non editable fields, which provide a tally of the results found, and the Bookings selected.

Select All/Unselect All

Select all Bookings found, or un-select all Bookings selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Bulk Service Insert (PCM), see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Service Line Insert

All Service Types

An alphabetic list of services types to choose from when searching the product database. Click on a service type to highlight it (i.e. to select it). One or more service types can be selected and all matching products found will be returned in the Results tab.

Day/Seq.

For the first service to be entered into the Booking, this defaults to Day 1, Sequence 10. As services are added within each day of the Booking itinerary, Tourplan increases the sequence number by 10. The day and sequence number can be used to change the order of service lines within a Booking.

NOTE: Incrementing the Sequence number in 10s, allows new services to be inserted in-between existing services on the same day as those that have already been added to the Booking. A drop-down arrow next to the sequence field when selected provides a list of existing services allowing users to locate the point within the Booking that they may want to insert the new service. The system will then allocate the correct day sequence number.

Service Date

The date being entered here is the date of the service to be selected and inserted into the Booking. The date can be changed for each service by typing a new date or using the drop-down calendar. Changing the date will automatically change the Day number. Alternatively, the Day number can be used to change the date. The day of the week will automatically update to reflect any change in the date.

Time: If a time of arrival is known, it can be entered here. If entered here, the time will transfer into the Pickup field when selecting the Pickup Button.

NOTE: Once the service is saved editing or updating a time can occur within the service line Pickup/Dropoff tab within the service details or from the Itinerary Menu > Pickup/Dropoff.

The value in this field quantifies the number of product Second Charge Units.

> Once a product is selected, the SCU gets a label, which comes from the Second Charge Unit description in the Product Database.
>
> For example, the supplier ***SCEN01 - Johnstons Scenic Coachlines***, out of ***AKL - Auckland*** has two product offerings; a charter service and an intercity service. These are found in the Product Database via *Home > Products > Product Setup* (*Price Rules tab)*.
>
> For the charter service, the First Charge Unit is ***Coach*** and the Second Charge Unit is ***Tour***, so this service will have an SCU label of ***Tour*** on the Service Line Insert screen when it is selected.
>
> Conversely, the intercity service will have an SCU label of ***Trip***, which is how the service is charged.

NOTE:

- **Accommodation** - the FCU is Room, and the SCU is Night, so the is the number of Nights required.

- **Non-accommodation** - e.g. for , the FCU is , the SCU is , so the quantity required is . The system knows (from the product setup) how many people the can take and, if the number of people exceeds the available size, the system will automatically adjust the number of FCUs () to suit so, in this example, .

Country

The Country where the service takes place or originates. Not all users will see this field, this is determined by each user company's procedures as to if this field is required.

Destination

The Destination where the service takes place or originates. Not all users will see this field. It will depend if user company's requirements.

Location

The location where the service takes place or originates.

Supplier

Used in conjunction with Service Type, Location and Code fields to search the product database.

Code

Used in conjunction with Service Type, Supplier and Location fields to search the product database.

NOTE: In addition to Service Type (which defaults to *All Service Types*), with any one of either Location, Supplier or Code, the **Find Products** green button is highlighted. The more codes that are filled in when searching for products in this screen, the more accurate and filtered the results.

Price Code (+ to expand)

There are 4 selections available each of which defines how the system will handle rate retrieval and possible re-calculations for this service.

System Price Code - this selection allows the system to handle selection of the price code. This means when the package is booked, the price code will be re-evaluated using the booking agents attached price code hierarchy without honouring the original price code used in the package service line. The System Price Code selection will ensure the package service will be booked using a price code available to the agent.

The remaining selections are:

- All Price Codes
- Applicable Price Codes
- Selected Price Codes - where a nominated price code can be selected

Selecting one of the remaining three options, will override the system selection defining this price code to be the highest priority. This will generally only be applicable if you require a package to always be booked using a specific price code over the agent price code defaulting logic.

Insert Service Line Results

The Results tab shows a list of all products found that match the selection criteria. Products are presented in list form under the following columns.

NOTE: All scrollable lists can have columns added or removed per user (i.e. you can change the default columns that appear in your view of the list). Click on a space in between two column labels (if you click on the label itself, the scroll will re-sort based on the column clicked on). The list of available column names will display and they can be check-box selected/deselected. The width can also be set, as can normal or bold font.

Filter Button

The results tab provides users with an additional filter option, products and services can be filtered by class, locality or attached amenities.

NOTE: *This is dependant on if user company's procedures have selected to use these fields in their product setup*.

Consultants can also define a rate price range for results to return based on minimum and maximum agent values.

Search Icon

There is a search icon located next to the column 'Book' heading. This allows users to quickly search the Product Search application for an existing entry. An additional search field will enable users to insert text to search, and previous and next (arrow buttons) identify entries which match the search criteria.

The Enter key can be used as a quick key to move to the next matched searched result.

Insert

A button labelled Insert allows the service to be inserted into the selected bookings or PCMs.

Location Name

Full name of the location where the service is provided.

Service Name

Full name of the service (from the Selection tab under *All Services*).

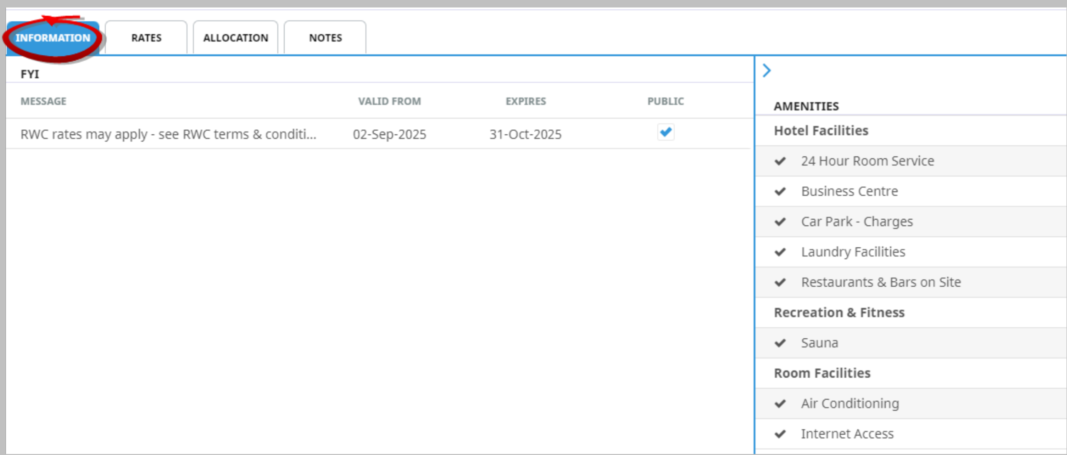
Name

Full name of the service supplier.

Description

A drill-down link to further information about the service, including *Rates* and *Notes*. Book and Hold buttons are also available on the drill-down screen (albeit coloured blue, rather than green and grey).

This example shows a property that has FYI message information, and shows the amenities available at the property. Clicking on the other tabs within this screen will allow users to see further detail.



Comment

A further field that is sometimes used as an extra descriptive field for product, or for an internal note. An example could be for accommodation services, where this organisation uses the comment field to show meal inclusions - Includes light continental breakfast.

Class

For accommodation services, this label identifies the class of accommodation; e.g. 4-Star, 5-Star, Back-packers, Luxury Boutique etc.

Sell

The cost price in the Product Database, plus markups (regardless of source), less agent commission.

NOTE: It is possible that the same product displays multiple times. This is because of INI settings that determine what is to display by default. Where the same product is displayed multiple times, it is once for each price code that has been set up against the date range for the product.

"Booked" is not Saved

It is important to remember that, when viewing a list of results (or any aspect of a service within these tabs), the service has *not yet been inserted into the , even if* ***"Book"*** *has been clicked*. The tabs are available to refine selections and to inquire on various aspects of a service. Services are not saved into the until the Insert New Service process is complete, which requires each service

A full list of field columns available within the Results tab is available Service Line Insert (Service Scroll Headings).

Summary

A summary of the Booking Bulk Service Insert process is displayed to inform users of successful service insertion. Additional tabs highlight Bookings that require further attention to add a new service or indicate if an error has occurred.

Summary Modal displays three tabs:

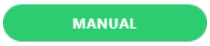
- **Successful** - where the total number of processed Bookings is displayed in the bottom left corner of the Modal. The number of Bookings successfully updated displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, and Travel Date.
- **Attention Required** - where the number of Bookings requiring attention displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, Travel Date, Rate Status, and a Message column indicating the attention required. For example: Rates have expired, a cross season rate, a sequence number changed, allocation status.
- **Errors Encountered**- where the number of Bookings that the service line was unable to be added to the Booking displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, Travel Date, Rate Status, and a Message column indicating the error. For example: no available sequence number for the relevant day, product not allowed to be used on that day.

Save Bulk Service Insert Filters

Common or frequently used Bulk Service Insert Filters can be saved and given a Description so that repeatable tasks can be easily accomplished.

Bulk Service Insert

1. From the Home menu, select **Home > Operations > Booking Operations > Bulk Service Insert**.
2. Click **Manual.**

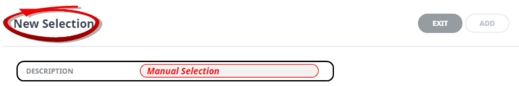
   

3. On the blank Bulk Service Insert - Manual Selection screen, the **Booking Tab** will open, select the required filters from the field selections, and tabs available.

   View "About Bulk Service Insert Fields" on page 221 to learn more about all field selections available, or view the individual tab filters; " PCM Tab" on page 221, "Analysis Tab" on page 222 (Booking), "Service Tab" on page 222, or " Results Tab" on page 222.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selections a 'Description'.

8. Click **Add** to add this filter description.

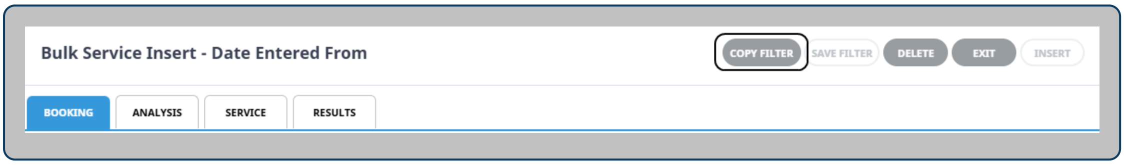
9. Click **Exit** to discard any changes.
10. NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Service Insert. If selected for future Bulk Service Insert processing, results will be returned based on the saved filters.

The procedures just described are sufficient to create manual filter criteria to manage Bulk Service Insert features - saving filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

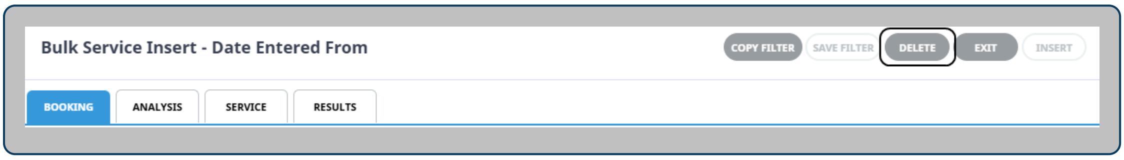
Copy Bulk Service Insert Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Bookings Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Bulk Service Insert Filters

Deletion of Filter Descriptions is allowed, to be able to manage currency of tasks and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to delete, the filters will not be able to be retrieved again.



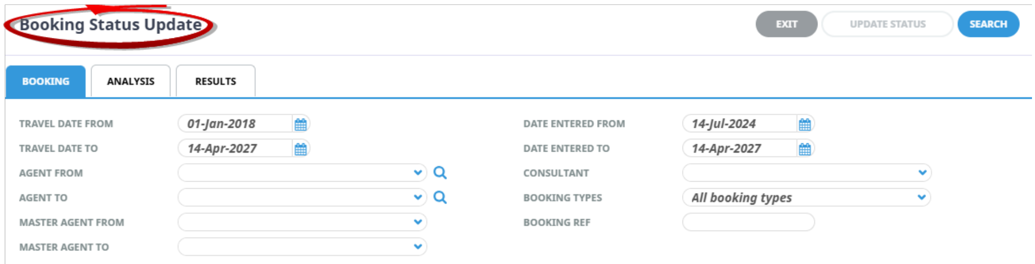
Booking Status Update

There may be situations that you will need to do a bulk update of Booking Statuses.

Multiple Bookings are selected, and updated in bulk. The procedure below describes how to update multiple Booking Statues.

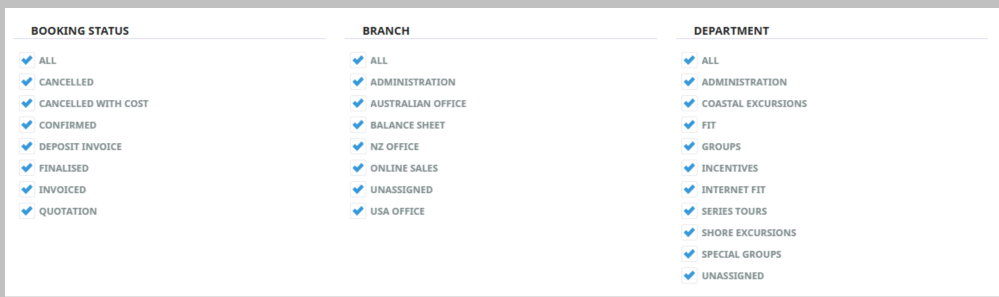
Bulk Update Booking Status

1. From the Home menu, select **Home > Operations > Booking Operations > Booking Status Update**.
2. On the blank **Booking Status Update** screen, the **Booking Tab** will open, Complete the necessary fields. You can amend the Travel Date From/To, and Date Entered From/To fields to display results for a range of dates.



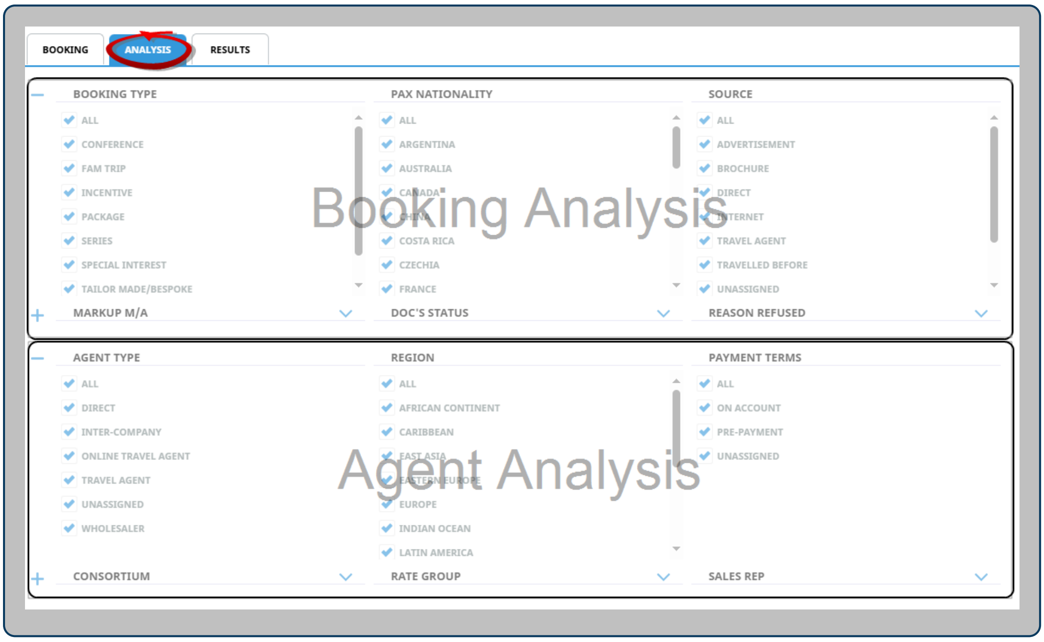
3. Keeping with the **Booking Tab**, Bookings can be filtered using 'Booking Status', 'Service Status', 'Branch' and or 'Department'. If applicable, select the required filters.

Filters used in this screen capture are examples used for Training purposes. Booking Statuses, Branch and Department selections will reflect users own organisational fields.



4. Click on the **Analysis Tab**, selection of Bookings can also be made from 6 of the Booking Analysis Codes, and 6 Agent Analysis Codes. If required select the applicable 'Analysis Codes'.

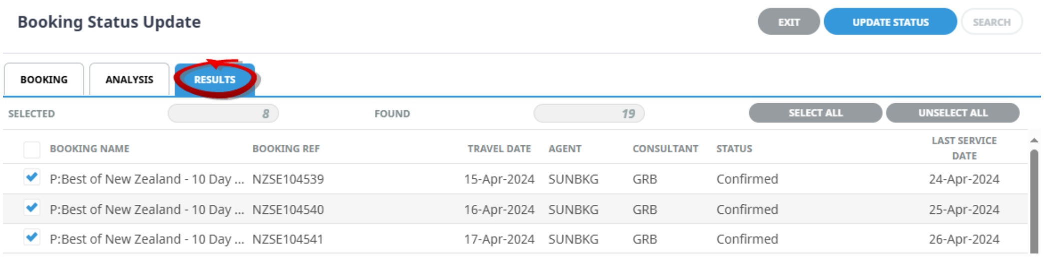
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



5. Check the **completed screens**.

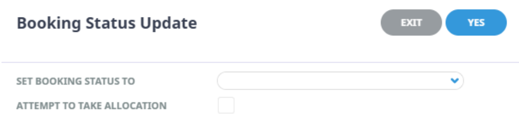
6. Click on the **Results Tab**. Select the Bookings using the 'Select check boxes' next to each Booking, or use 'Select All'.

   NOTE: The Update Status button will become active when Bookings are selected.



7. To change the status, click **Update Status**.

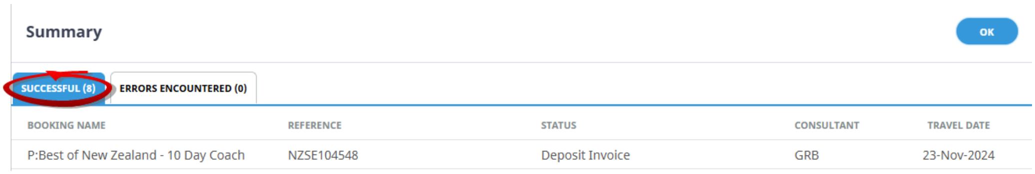
8. On the blank **Booking Status Update** screen, select the new Status to **Set Bookings Status To** , and click the **Attempt to Take Allocation** checkbox, if the status change should allow the booking to take from Allocation.



9. To keep the changes, click **Yes**.

10. Click **Exit** to discard any changes.

11. If '**Yes**' was selected a Summary will appear with the number of **Successful** Bookings to be updated.



12. Click **OK** to exit the modal.
13. The Booking Status Update Results Tab will re-display select **Exit** to close.

About Booking Status Update Fields

Travel Date From/To

Travel Date for Bookings is the date that appears in the header of a Booking, this is generally the date of the first service. This date range field is used to select Bookings with a specific date or fall within a range of Travel Dates.

Agent From/To

Selecting an Agent here will limit the filter results to only Bookings for that Agent, or range of Agents.

Master Agent From/To

Selecting a Master Agent here will limit the filter results to only Bookings for that Master Agent or range of Master Agents.

Date Entered From/To

This is the date the Booking was created. If selection for a range of dates is entered here Bookings that were created within the date range provided will display in the results screen.

Consultant

Selecting a consultant code and consultant name will limit the results to PCMs for that consultant.

Booking Type

Drop down selection for the type of bookings to be included, selection includes:

- All booking types - bookings from either FIT bookings or Group bookings will be listed.
- FIT's - those bookings that are FIT bookings will be listed.
- Groups - those bookings that are Group bookings will be listed.

Booking Ref

Used to select a specific Booking Reference.

Booking Status

By default, all Booking statuses are checked, Bookings can be filtered by selecting / deselecting the required Booking status code in the Multi Select List box. Un-check statuses that are not required.

Branch

By default, all Booking Branches are checked, if only Bookings with specific Branch(s) need to have the Booking Status Updated, check the appropriate box(es).

Department

By default, all Booking Departments are checked, if only Bookings with specific Department(s) need to have the Booking Status Updated, check the appropriate box(es).

Analysis Tab (Booking & Agent Analysis)

Booking Analysis

The rows on this tab are the 6 Booking Analysis codes.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Analysis fields can be expanded or minimised by using the + or - function.

Results Tab

Selected check boxes

Bookings can be individually selected.

Select All/Unselect All

Select all Bookings found, or un-select all Bookings selected.

Selected

The cell to the right of this heading will provide you with the number of Bookings that have been selected.

Found

The system will provide you with the number of Bookings found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Summary

A summary of the Bookings processed is displayed to inform users of successful Status Updates. An additional tab highlights Bookings where an error has occurred.

Summary Modal displays two tabs:

- **Successful** - where the total number of processed Bookings is displayed in the bottom left corner of the Modal. The number of Bookings successfully updated displays next to the tab heading, and a list of Bookings is shown, including the: Booking Name, Status, Consultant, Reference, and Travel Date.
- **Errors Encountered** - where the number of Bookings which encountered errors displays next to the tab heading, and a list of Bookings is shown, including the: Booking Name, Consultant, Reference, Travel Date, and a Message column indicating the error.

Book On

Some package tours are sold to more than one agent/client. For these types of tours you need the facility to treat the tour as an individual booking towards the agent/client or as a group towards the supplier.

The book-on/roll-up functionality will allow you to handle these types of tours. The client will be booked-on to a Master Groups booking via an FIT or Group booking.

There are two distinct types of packages that Tourplan can handle:

- **Copy In Package**

  A collection of services which have been created in a Tourplan Pre-Costed Module (PCM) and which have a specific package price service option record attached to control the package selling price. In the processing of these Bookings, the client (traveller) will receive one voucher for each service in the booking. In its method of operation, the contents of the PCM are 'copied' into the booking, and the selling or retail price of the package is maintained.

  The operation of FIT Packages is detailed in the FITs User Manual within the chapter Create New FIT Bookings > Package Insert.

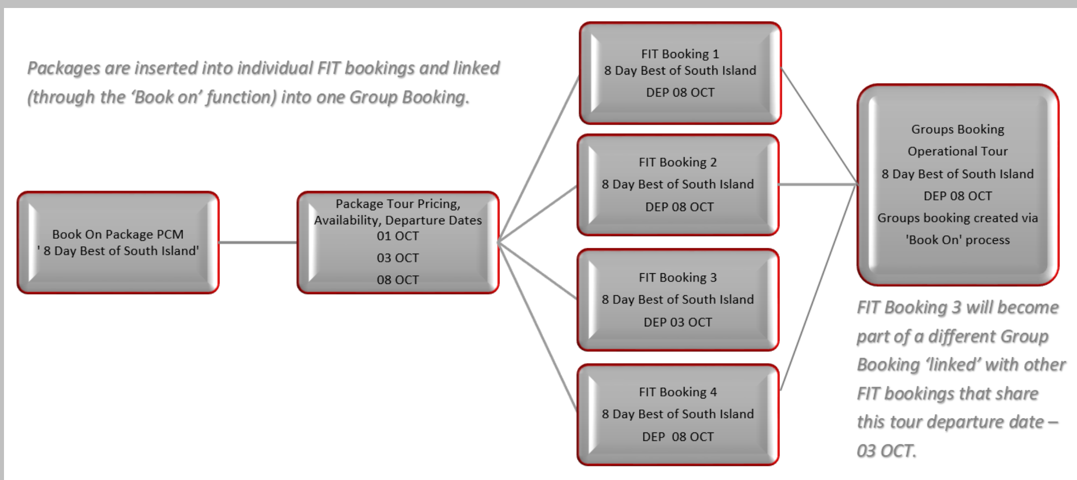
- **Book On Package**

  A Group SIC tour (e.g. 'Best of NZ 12 Day') that is being operated by (not just sold by) the Tourplan user company. The tour is created as a Pre-Costed Module (PCM) and has a specific service option attached which contains the package price and links to the allocation module to control the number of seats available on each departure date. The tour is sold only as a 12 day tour and passengers book on to it. Each actual booking made in Tourplan for the package is an FIT booking. The package is entered into the FIT booking as one service line (although the component services of the package are in the background of the FIT Booking so that Itineraries etc. can be produced), and the client (traveller) receives one voucher covering the entire package—in other words, the client gets the voucher as a 'ticket' entitling them to board the tour.

  The package operates as a Groups booking and this Group booking becomes the operational tour—service vouchers are produced for all pax travelling on the package, and rooming lists can be created from one combined Group Booking.

The Book On function in this section details and assembles the FIT bookings that are traveling on Group packages for a specific date and creates an operational Group Booking.

In this example you can see that there are 4 individual FIT bookings that have an 8 Day Best of South Island package booked. Three of these bookings depart on the same day (08 OCT) and will be 'Booked on' to the same Group booking.



If additional FIT bookings are created for Group Packages that have already been linked, the Status field in the Book On screen will display 'Re-Link Required'. Accessing the Group Booking when the FIT bookings are in this condition will display a warning that re-linking is required.

Re-linking can be done by consultants within the **Group booking > Operations and Accounts > Re-Link Package**.

Book On

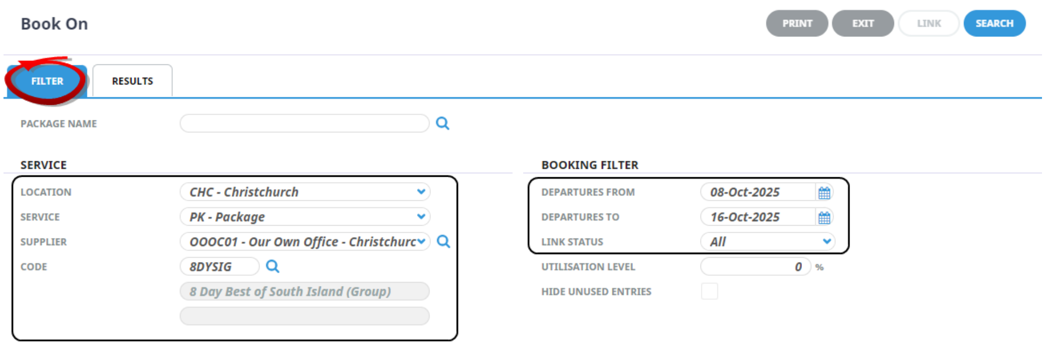
1. From the Home menu, select **Home > Operations > Booking Operations > Book On**.

2. On the blank **Book On** screen, the **Filter Tab** will open. Select either the (PCM) *Package Name* or the (Product Package) Service *Location*, *Service*, *Supplier*, and enter the *Service Code*. Under the Booking Filter heading, select the required *Departures From/To* dates.

   The Booking Filter **Departures From/To** (date) fields are mandatory. Selection of specific tour dates or a range of tour dates can be entered.

   Either the **Package Name** (from the PCM), or the **Product 'Service'** fields are to be completed. Manual entry of the (service) code is required and the Description and Comment fields from the product option will populate if a valid service has been selected.

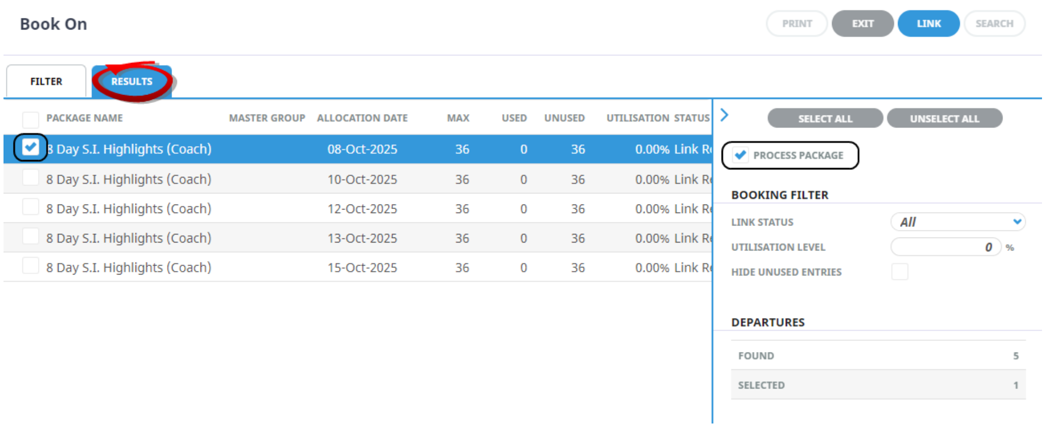
   NOTE: The results tab will not return bookings until either the (PCM) Package Name or the (Product) Service fields are valid, and the Departure From/To fields have dates applied.



3. Check the **completed screens**.

4. Click on the **Results Tab**. Select services using the *Select* check boxes next to each service, or use *Select All*.

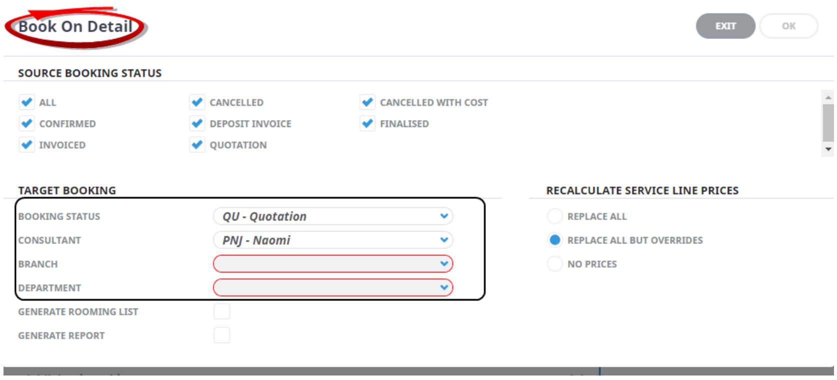
   NOTE: The 'Process Package' check box will become active when packages are selected.



5. Click **Link** to roll up FIT bookings into a linked Group booking.

6. On the blank **Book On Detail** screen, select the (FIT) *Source Booking Statuses* , and the (New Group Booking) *Booking Status*, *Consultant*, *Branch* and *Department*.

   NOTE: Branch and Department fields are to be completed. Consultant and Booking Status are defaulted and can be selected to suit user requirements. The Re-calculate Service Line Price check boxes will default to selection of Replace All But Overrides.



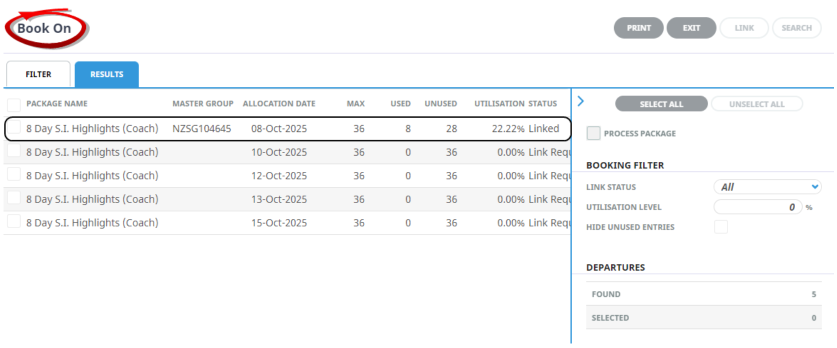
7. Click **OK** to keep the changes and save or update the entry.

8. Click **Exit** to discard any changes.

9. If **OK** was selected a Summary will appear with the number of successful packages to be updated.

   Click **OK** to keep the changes and save or update the entry.

10. The **Book On** Results screen will re-display, the package will have updated the status to 'Linked' select '**Exit'** to close.



About Book On Fields

Filter Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes selection for Booking Status, Service Status, Branch and or Department.

Package Name

The name of the PCM that constitutes the package.

NOTE: Users can use the search function to search for the package name or the PCM name can be copied and pasted from the PCM application using the CTRL+C, CTRL+V keys.

Service

In the 'Service' selection, use the drop downs to select the Location, Service, Supplier code of the service to be used.

The (product) **Code** is to be inserted manually. When a valid service has been selected the grayed fields below the Code will populate with the product Description and Comments (if any) for the service.

NOTE: If data does not display in the fields below the Code then incorrect detail has been entered.

Booking Filter

Departures From/To

A specific or range of departure dates can be entered in these fields. Date selection can be by using the calendar or by entering the date in the following format dd/mm/yy. This date refers to the 'Allocation' Date of the package.

Link Status

The status of the package in relation to the Group booking that will operate the package.

Utilisation Level

When a value is entered into this field, it is a percentage. Packages which have an utilisation of this percentage (or higher) and match any other selection criteria will be displayed.

Hide Unused Entries

When checked, any packages that meet the selection criteria, but have 0% utilisation will not be displayed.

Results Tab

Selected check boxes

Packages can be individually selected.

Select All/Unselect All

Select all packages found, or un-select all packages selected.

Process Package

When a package or all packages are selected this field will auto check.

Booking Filter

Filters such as 'Link Status', 'Utilisation' and 'Hide Unused Entries' can be used to filter bookings within the results screen.

Link Status

The status of the package in relation to the Group booking that will operate the package

Utilisation Level

When a value is entered into this field, it is a percentage. Packages which have an utilisation of this percentage (or higher) and match any other selection criteria will be displayed.

Hide Unused Entries

When checked, any packages that meet the selection criteria, but have 0% utilisation will not be displayed.

Found

The system will provide you with the number of packages found, matching the filter criteria.

Selected

The cell to the right of this heading will provide you with the number of packages that have been selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Book On, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Book On Detail

Source Bookings Status Section

Statuses

These statuses apply to the source (FIT – bookings). Check the booking statuses that are to be selected.

Target Booking Section

Booking Status

The booking header status that is to be applied to the Groups booking.

Consultant

The Consultant detail to be attached to the Groups booking.

Branch

The Booking Reference Branch to be applied to the Groups booking.

Department

The Booking Reference Department to be applied to the Groups booking.

Generate Rooming List

This checkbox is only available if:

- The INI setting BOOKON_ROOMLIST is set to NOTES, and
- The INI setting BOOKON_ROOMLIST_CAT has a note category set in it.

Generate Report

If checked, this checkbox produces a 'Print - Book On Packages' screen which allows for downloading of the package details as a CSV or PDF.

Recalculate Service Line Prices

Click the recalculation option required.

Book On Report

Book On Package Reporting can be printed from the Book On Operations screen as part, or independently, of the roll up process. Users have the ability to filter packages based on the package link status (e.g. All, Linked, Linked Required or Re-link Required). Results retuned on-screen can then be downloaded to CSV or PDF file output.

The report provides a list of packages (which depart between the previously filtered dates) and users can see the maximum number of pax allowed per Package and the number of Pax who have booked this package in the 'Used' column.

Searching Book On Packages by Link Status

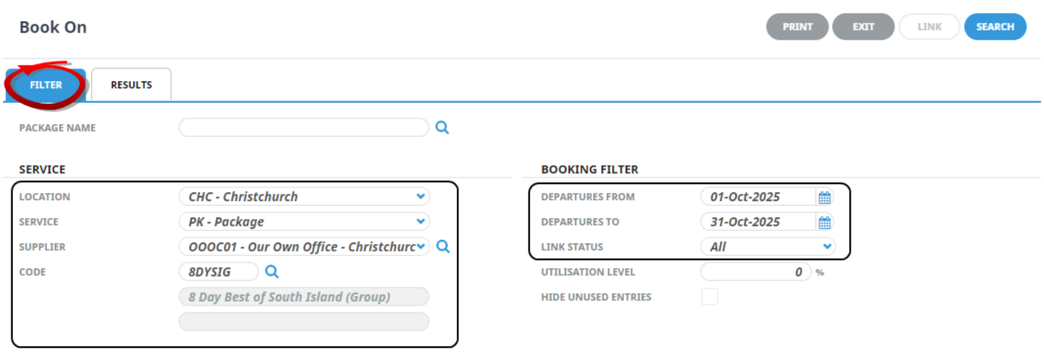
1. From the Home menu, select **Home > Operations > Booking Operations > Book On**.

2. On the blank **Book On** screen, the **Filter Tab** will open, select either the (PCM) *Package Name* or the (Product Package) Service *Location*, *Service*, *Supplier*, and enter the *Service Code*. Under the Booking Filter heading, select the required *Departures From and To* dates.

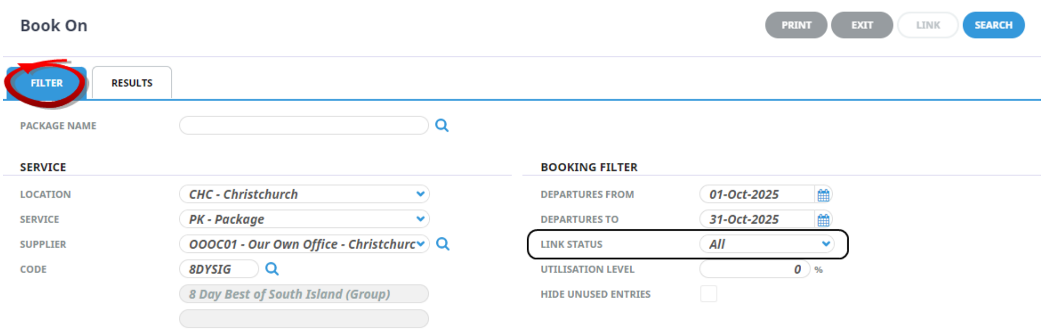
   The Booking Filters **Departures From/To** (date) fields are mandatory. Selection of specific tour dates or a range of tour dates can be entered.

   Either the **Package Name** (from the PCM), or the **Product 'Service'** fields are to be completed. Manual entry of the (service) code is required and the Description and Comment fields from the product option will populate if a valid service has been selected.

   NOTE: The results tab will not return bookings until either the (PCM) Package Name or the (Product) Service fields are valid, and the Departure From and To fields have dates applied.

3. Select the **Link Status**.

4. Check the **completed screens**.

5. To print from NX, click **Print**.

6. To Output the report to a CSV file, click **Download CSV**.

7. To generate the report as a PDF file, click **Download PDF**.

   DOWNLOAD PDF

8. To view the report on screen, click **View**.

   VIEW

This example shows a report generated as a PDF file. You can see that the report provides a list of packages, the package name, the number of seats available per tour is 72 seats, and currently there are 0 used. Once the bookings have been linked an accurate picture of used seats will be seen.

Book On Packages Report

Date	Package Name	Master Group	Max	Used	Utilisation	Status
01-Oct-2025	8 Day S.I. Highlights (Coach)		72	0	0.00%	Link Required
03-Oct-2025	8 Day S.I. Highlights (Coach)		72	0	0.00%	Link Required
05-Oct-2025	8 Day S.I. Highlights (Coach)		72	0	0.00%	Link Required
06-Oct-2025	8 Day S.I. Highlights (Coach)		72	0	0.00%	Link Required

Report Parameters

Order By	Departure Date, Package Name
Report Bookings	No
Package Name	
Option Code	CHCPKOOOC018DYSIG
Departure Date From	01-Oct-2025
Departure Date To	08-Oct-2025
Status	LinkRequired
Utilisation Level	0
Hide Unused Entries	No

iCom Activity

If user organisations are using iCom, booking activity can be monitored and bookings can be actioned. Filters are selected and a list of bookings will show the action of the booking or modified via any of the Internet Add-Ons over a selected date/time range. Bookings can be searched for using filters such as travel date, iCom activity date and time, and other selections such as booking status or by branch/department.

This report would be used for operational monitoring of iCom bookings, and to provide users with up to date information for operational updates to the booking. For example Users are able to update the booking status of bookings in bulk or individually, and are able to send a queued message to a consultant to monitor the booking in Tourplan.

Booking status and assigning of consultants can be done from the activity report, and diary messages can be attached to bookings as a reminder.

All items under this heading are only relevant when Tourplan HostConnect has been enabled. HostConnect is the Tourplan component that allows websites to communicate with Tourplan to make bookings, and for Tourplan to communicate with external reservations systems to make bookings in those systems.

NOTE: HostConnect is an additional component of the Tourplan NX system and training on its use is given when it is installed.

iCom Activity Report

1. From the Home menu, select **Home > Operations > Booking Operations > iCom Activity**.

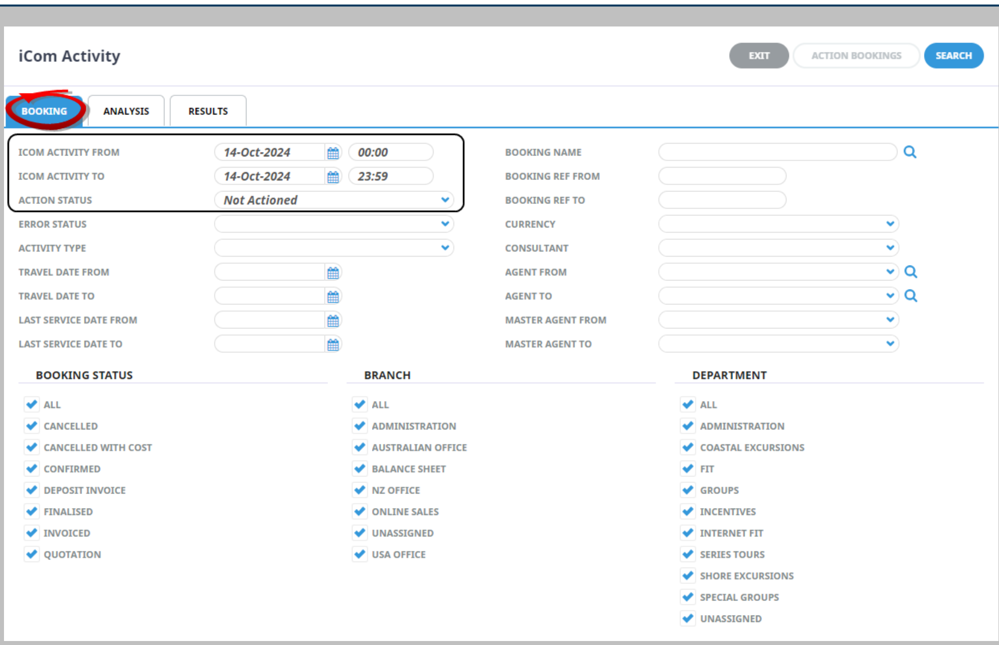
2. On the blank **iCom Activity** screen, the **Bookings Tab** will open, select the required filters from the field selections available within the **Booking Tab**,and the **Analysis Tab**.

   View About iCom Activity Booking Fields to learn more about all the field selections available, or view the individual tab filters: Booking Tab, Analysis Tab, or Results Tab.

   NOTE: iCom Activity From/To Dates and times, and Action Status are defaulted to system settings, (Today's date and time, and a service status similar to Not Actioned), these fields can be amended to suit iCom Activity report requirements.

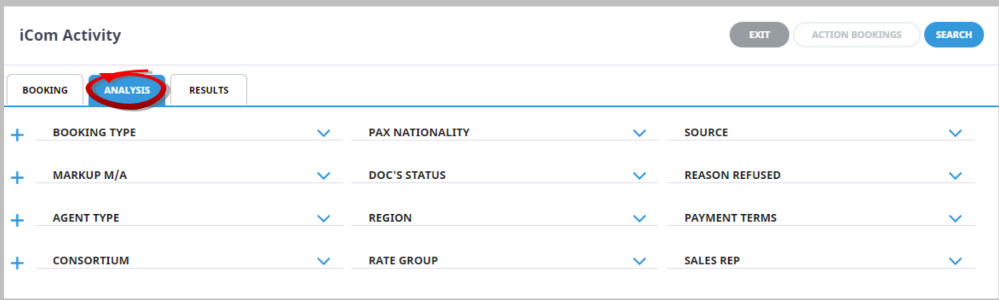
   Booking Tab

   Filters used in this screen capture are examples used for Training purposes, Status Branch and Department selection will reflect users own organisational fields.



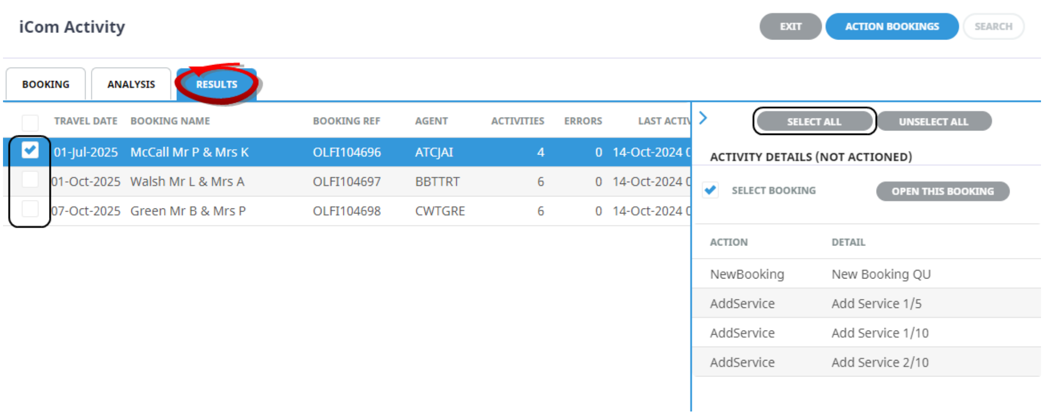
Analysis Tab

Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



3. Check the **completed screens**.

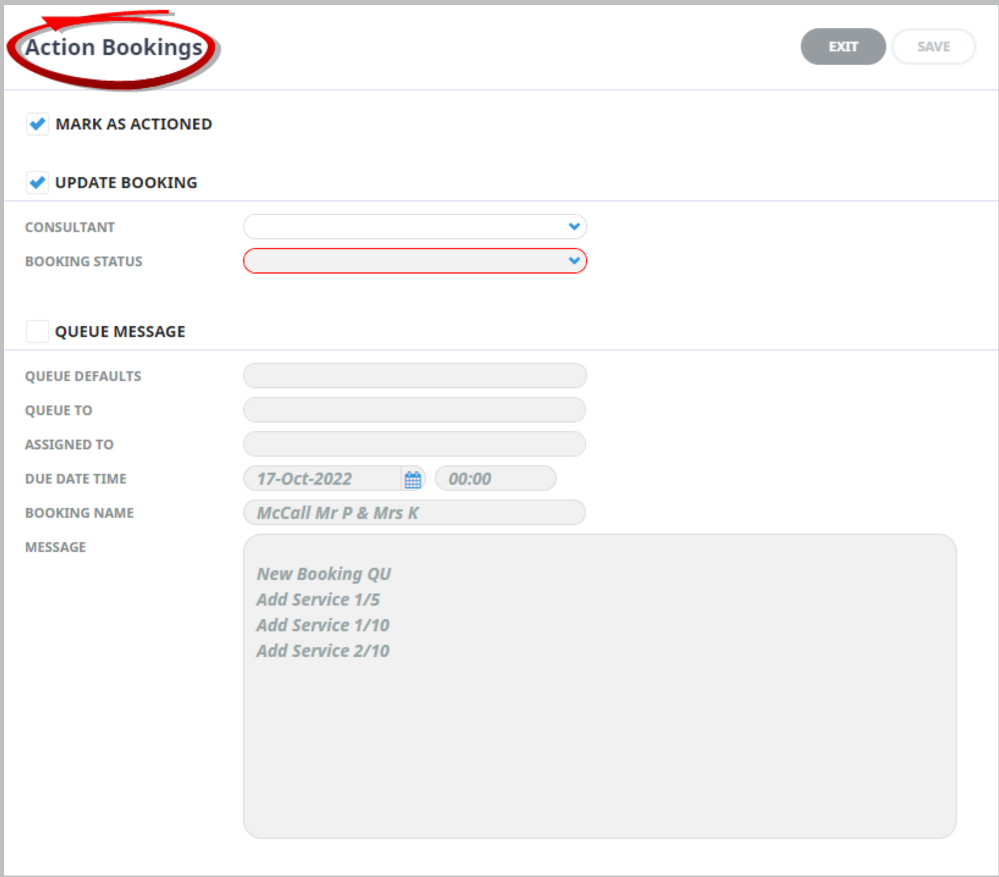
4. Click on the **Results Tab**. Select the bookings using the *Check-boxes* next to each booking, or use *Select All*. Click on the link provided to learn more about the Results Tab.



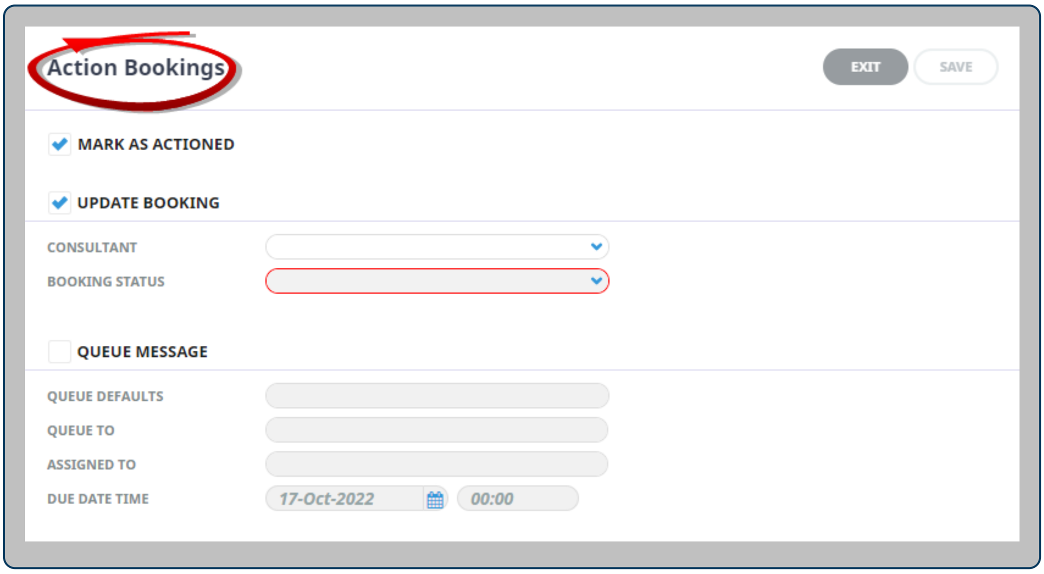
5. If selected bookings are to be actioned, click **Action Bookings**. Click on the link to view Action Bookings Settings.

If one booking is selected, information specific to the booking can be actioned.

Booking status can be updated, the booking can be marked as actioned, a consultant can be assigned and a message can be queued to a colleague. Message information will generate from the Actioned Detail on the previous screen or further detail can be included in the free format.



If multiple bookings are selected, the action bookings will have a reduced Queue Message selection available.



6. Click **Save** to keep the changes.

7. Click **Exit** to discard any changes.

About iCom Activity Booking Fields

Booking Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes selection for Booking Status, Service Status, Branch and or Department.

iCom Activity (Date) From/To

Used to select services with a specific, or range of, travel dates of the iCom bookings to be selected. Bookings that were created or altered within this date range will be selected.

iCom Activity (Time) From/To

Used in conjunction with the Date From/To, giving a specific time range of the iCom bookings to be selected. Bookings that were created or altered within this time will be selected.

Action Status

System setup setting with iCom, this will default to Not Actioned however selection of another action status can occur. Action Statuses available are:

- Actioned
- All
- Not Actioned (defaulted)

Error Status

Error statuses are recorded when the request has errored . Statuses available are:

- All
- Error
- No Error

Activity Type

Activity types are recorded when a booking is created or updated . Activity types are:

- Add Service
- Agent Advice

- Cancel Service
- New Booking
- Quote To Book
- Transaction Create
- Update Booking
- Update Service

Travel Date From/To

Travel date for bookings is the date that appears in the header of a booking this is generally the date of the first service. This date range field is used to select bookings with a specific date, or iCom bookings that fall within a range of travel dates.

Last Service Date From/To

This is the last service date for a service in the iCom bookings. If selection for a range of dates is entered here bookings that have services within the date range provided will be display in the results screen.

Booking Name

Results for a specific booking name can be returned if a booking name is specified. The search function in Tourplan can be used if the booking name is unknown, by selecting the search button (magnifying icon). Additional filters to search for specific bookings can be used.

Booking Reference From/To

Specific reference numbers or range of, can be selected to return results.

Currency

Dropdown selection of pre-defined currencies can be selected, this will return results for bookings with the specified currency.

Consultant

The consultant code attached to the bookings whose messages are to be output.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Booking Status

By default, all booking statuses are checked and bookings that have those status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and bookings that have those branches will be selected.

Department

By default all departments are checked, bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each users companys system.

Results Tab

Selected check boxes

Bookings can be individually selected.

Select All/Unselect All

Select all bookings found, or un-select all bookings selected.

Select Bookings

This check box will allow you to un-select a booking. The booking needs to be highlighted first before you can select or un-select.

Open this Booking

Selecting this will open the booking in another tab (organisations that have professional or enterprise editions - can have multiple tabs can be open).

Action and Detail

The list provided will show the action that has occurred in iCom and detail the action.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in iCOM Activity, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Action Bookings Settings

Mark as Actioned

Selection.

Update Bookings

Booking information can be updated:

- A **Consultant** can be assigned to the booking.
- The **Booking Status** can be updated.

Queue Messages

When this check box is selected the Queue/Messaging fields will activate.

If multiple booking are selected you will have the option to select:

- Queue Defaults - A selection of Queue Defaulted messages (Mandatory).
- Queue To - Who the message is queued to (if Queue Groups have been setup).
- Assigned To - Who the message is assigned to.

If one booking is selected additional messaging fields will also activate, including:

- **Booking Name** - The name of the booking, this is a read only field.
- **Message** - Information will display from the Action Description, additional information can be typed in the Message field.

Email Management

The Email Management is available to users or groups of users with Email Management security settings enabled. It allows administrators to view and manage imported emails from a centralised Inbox, and offers a Trash menu to send unwanted emails to the Trash bin.

> Please note: Emails are replied to from the booking the email has been assigned to. There is no ability to reply to an email from the Email Management page. Unassigned emails will need to be assigned to a new booking for users to reply to the email.

Inbox

The Inbox allows administrators to view and manage a filtered list of imported emails.

From the Email Management Inbox, Admin staff can:

- View the received email message content
- Assign unassigned emails to bookings, agents and/or suppliers when the import process has been unable to automatically assign them.
- Unassign (or unlink) assigned emails from bookings, agents or suppliers.
- Forward messages to another email account.
- Send Emails to Trash.

View Email

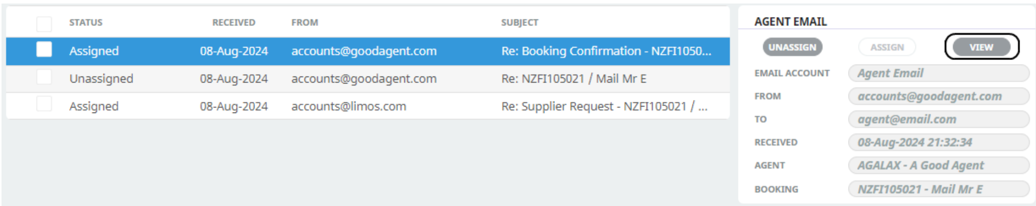
The contents of an email can be viewed from the Email Management Inbox, and Trash screens. Simply highlight the email and select view. A number of tasks can be preformed from within the Email view screen including:

- " Assign Email to Existing Booking" on the facing page
- "Assign Email to New Booking" on page 111
- "Unassign Email from Booking" on page 113
- "Forwarding an Email" on page 114

View an Email Message

1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Inbox**.
2. A list of emails displays. Expand the **Email Filter** to filter emails by Email Account, Date, Agent, Supplier, Booking Reference, Email Type or Email Status.

3. Highlight the Email line and select **View**.



4. Click **Exit** to close.

Assign Emails

The Email Management Email Status Filters are used to identify Unassigned or Error email messages. An email marked as unassigned indicates that the system could not find matching data in the subject line or contact information, resulting in it not being matched (or unassigned) during the import process.

There are two procedures for assigning an email:

Assign to an Existing Booking

Assign to a New Booking

Existing Booking - Emails are assigned by highlighting the email line, and selecting the View button, to view the email. The Email Type selected provides search field criteria to locate the booking, agent or supplier.

There are 6 Email Types, each selection enables different search fields:

- **Booking** - assigns the email to a booking
- **Booking Agent** - assigns the email to a booking and the agent
- **Booking Supplier** - assigns the email to a booking and supplier
- **General** - the email has not been assigned to an agent, supplier or booking
- **General Agent** - assigns the email to an agent only
- **General Supplier** - assigns the email to a supplier only

If the Booking Name is known you can enter it in the Booking field, or use the Search button to open the full Booking Search.

If the Agent or Supplier are known you can enter their name in the Agent or Supplier fields, or use the Search button to open the full Debtor or Creditor Search. If the email type is a Booking Agent or Booking Supplier message with a booking selected, the Debtor and Creditor search function is disabled and the dropdown list of options under Agent and the Supplier fields are restricted to those that appear in the booking.

Assign Email to Existing Booking

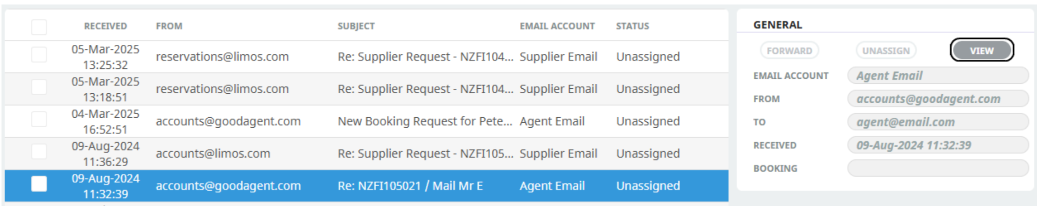
1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Inbox**.

2. >A list of emails displays. Expand the **Email Filter** to filter emails by *Email Account*, *Date* (from and to), *Agent*, *Supplier*, *Booking Reference*, *Email Type* or *Email Status*.

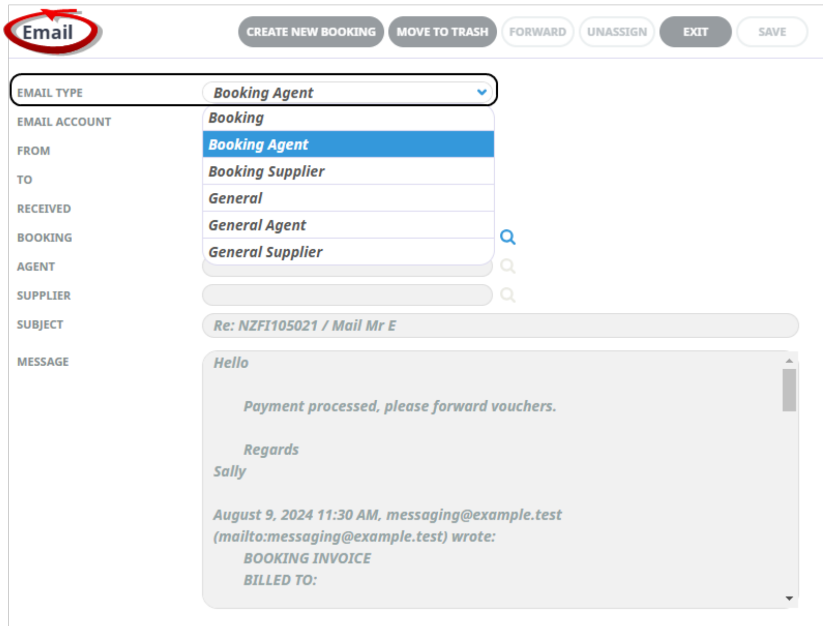
   NOTE: To view unassigned emails, select the '*Unassigned*' Email Status in the Email Filter.

   + EMAIL FILTER

3. Highlight the Unassigned Email line and select **View**.

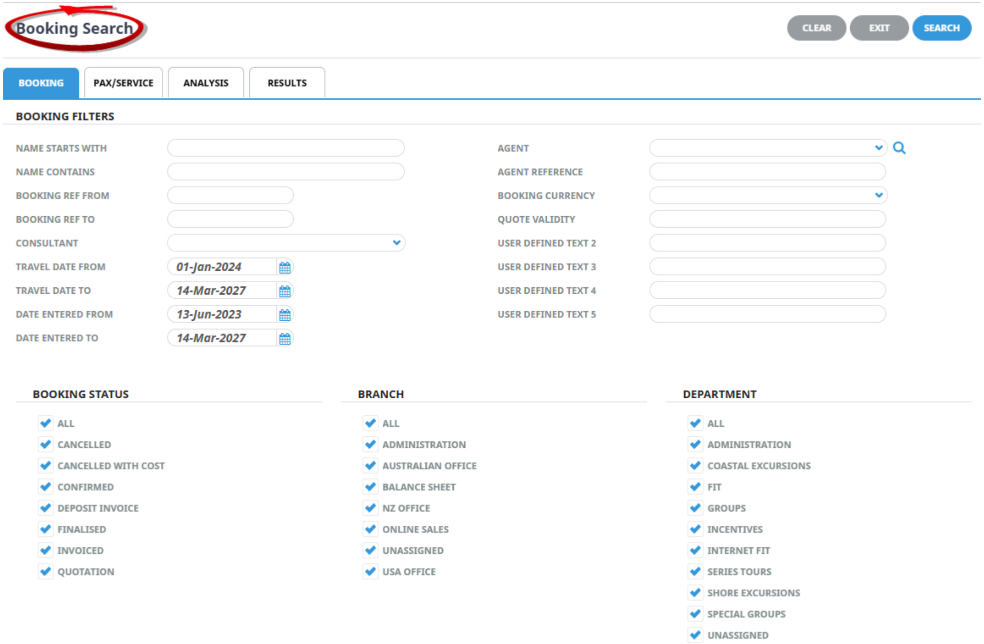


4. The **Email** screen opens, select the Email Type.
   For more information on field selections see the "Email Type" on page 117



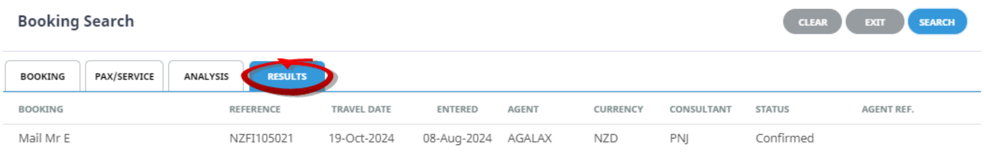
a. Enter the Booking Name (if known) and click the corresponding **Search** icon. Or,

b. Use the full Booking Search, select the **Search** icon, to open the **Booking Search** screen.

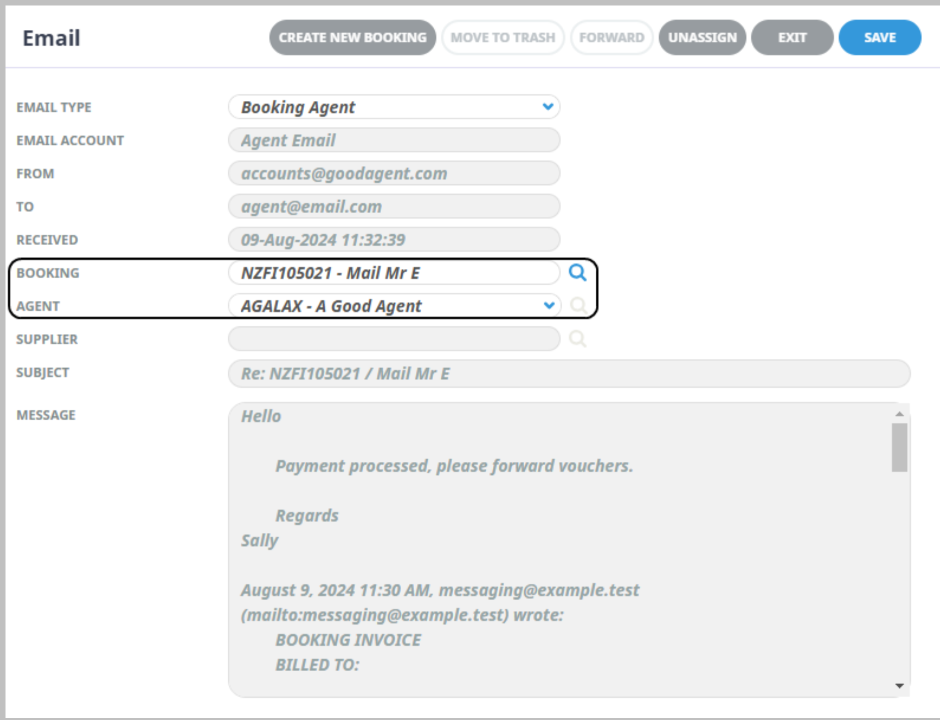


i. Click **Search**.

c. The **Results** screen opens, click the Booking you want to Assign the email to.

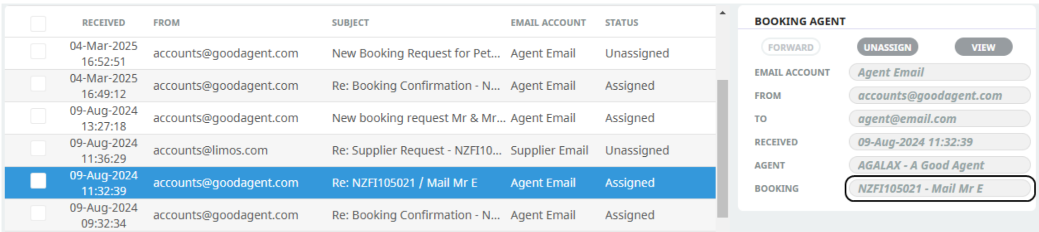


d. In this example; *Email Type* - Booking Agent was selected, the *Booking* and Agent fields now have the Booking Reference, Booking Name and Agent inserted from the selected booking.



e. Click **Save** to keep the changes.

5. The Email **Status** shows the email is **Assigned** to the selected booking.



6. Continue to process emails, to **Exit** close the Booking Operations browser tab, or select a new menu option.

Assign Email to New Booking

Create New Booking - Unassigned emails with no previous booking history can be assigned to a new booking. Simply view the email and select the Create New Booking button, complete the Booking Details and the email will automatically assign to the new booking.

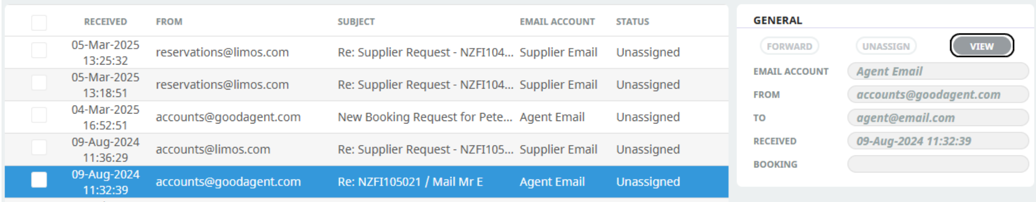
1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Inbox**.

2. A list of emails displays. Expand the **Email Filter** to filter emails by *Email Account, Date, Agent, Supplier, Booking Reference, Email Type* or Email Status.

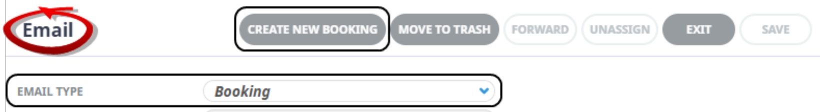
   NOTE: To view unassigned emails, select the '*Unassigned*' Email Status in the Email Filter.

   + EMAIL FILTER

3. Highlight the **Unassigned** Email line and select **View**.

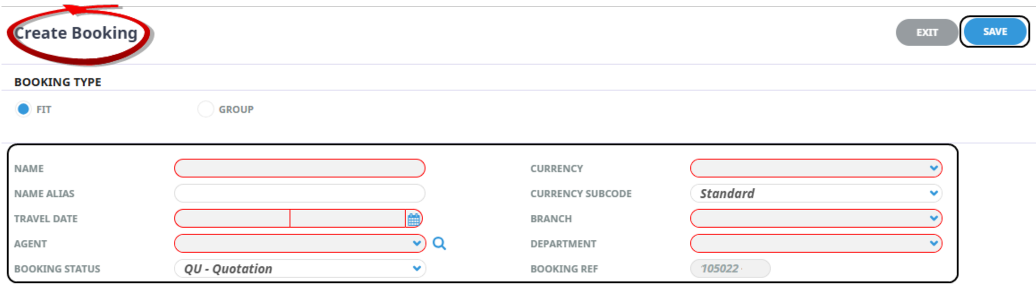


4. The **Email** screen opens, select an Email Type: *Booking* or *Booking Agent* to enable the **Create New Booking** button.

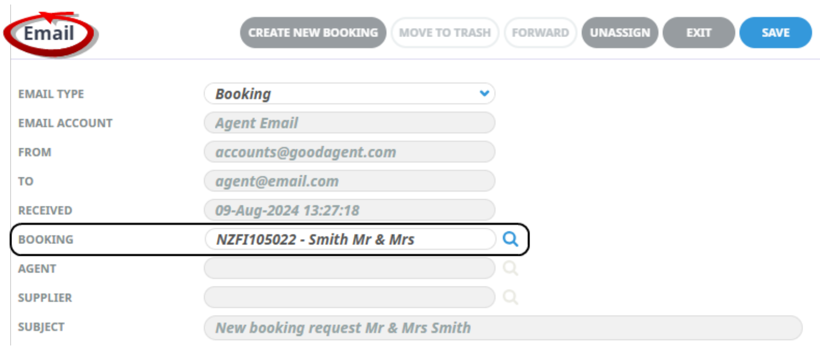


5. Click **Create New Booking** to create a booking.

6. The **Create Booking** screen opens, select FITs or Groups to create an FIT booking or a Group Booking, enter the **New Booking Details**, and click **Save**.

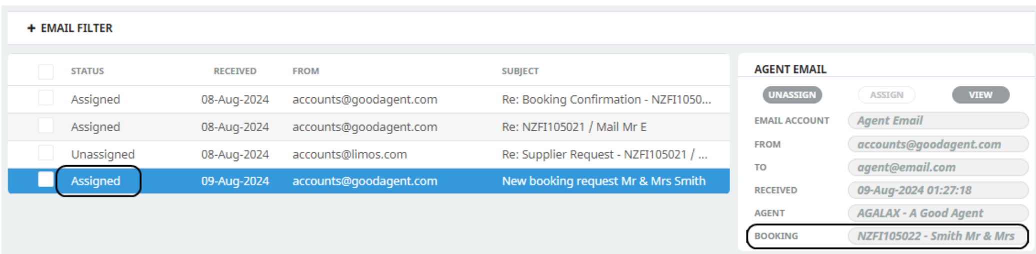


7. The **Email** screen now displays the new Booking Reference and Booking Name in the *Booking* field.



8. Click **Save** to keep the changes.

9. The email **Status** shows the email is **Assigned** to the new booking.



10. Continue to process emails, to **Exit** close the Booking Operations browser tab, or select a new menu option.

Unassign Emails

Emails can be unassigned if they were assigned in error. There are two methods to unassign an Email, simply highlight the email and select Unassign, or view the email and select unassign. The Email can then be re-assigned to a booking following the assign email to booking procedure, moved to trash, or forwarded to an external email account.

Unassign Email from Booking

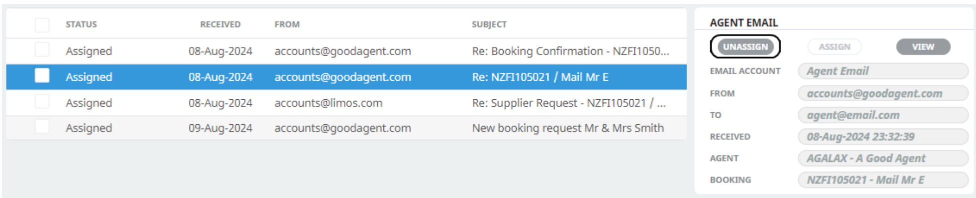
1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Inbox**.

2. A list of emails displays. Expand the **Email Filter** to filter emails by Email Account, Date, Agent, Supplier, Booking Reference, Email Type or *Email Status*.

   + EMAIL FILTER

3. There are two methods to unassign an email, from the Main Inbox Page (a), or from the Email view (b).

   a. From the Main Inbox Page, highlight the *Assigned* Email line and select **Unassign**.

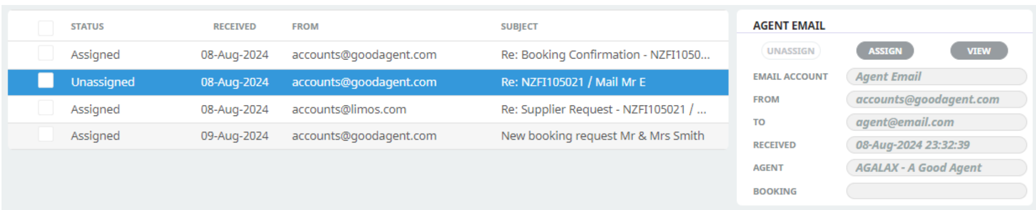
   

   b. Or highlight the *Assigned* Email line and select **View**, and then click **Unassign**.

4. A confirmation dialog displays. *Unassigning this email will remove it from any Booking/Supplier/Agent*, select **Yes** to confirm, or **No** to return to the Inbox.

5. If **Yes** is selected, the email re-displays in the Inbox with an **Unassigned** status.

   NOTE: Filters may need to be adjusted to view unassigned emails.

6. The email can now be assigned, by following the procedure. " Assign Email to Existing Booking" on page 109 or "Assign Email to New Booking" on page 111

Move Emails to Trash

Emails are not deleted, instead they are moved to Trash. There are two methods to moving emails to Trash, a bulk selection from the Email Management page allows multiple emails to be moved at once, or an individual email selection via the view email screen.

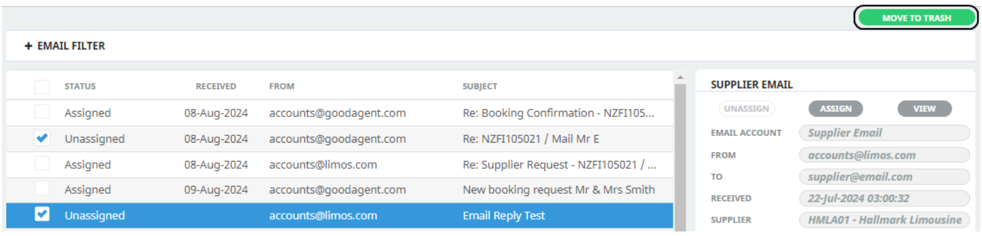
1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Inbox**.

2. A list of emails displays. Expand the **Email Filter** to filter emails *by Email Account, Date, Agent, Supplier, Booking Reference, Email Type* or Email Status.

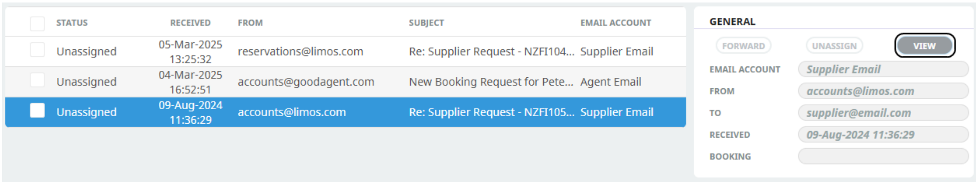
+ EMAIL FILTER

3. There are two methods the first is a bulk move of emails (a), the second is from the Email view (b)..

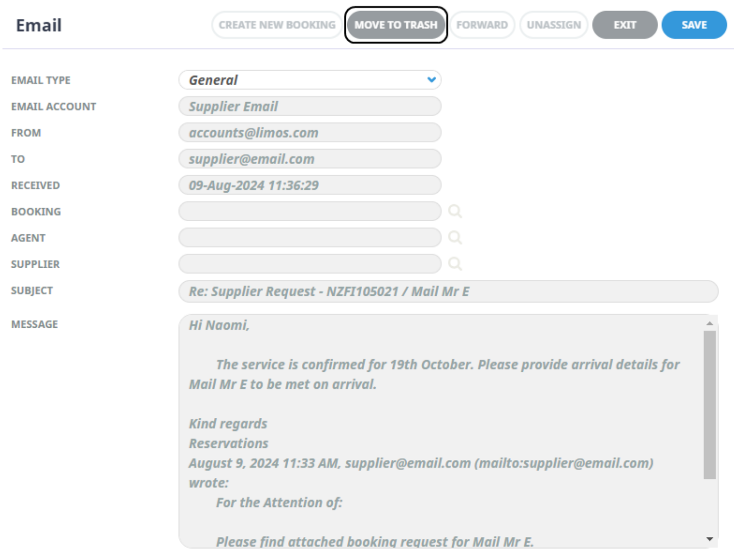
   a. Check the box next to the Email(s) and select **Move To Trash**.



   b. Highlight the email line, and select **View**.



      i. Select **Move To Trash**.



4. The emails are moved to Trash.

Forwarding an Email

Emails are not deleted, instead they are moved to the Trash menu list.

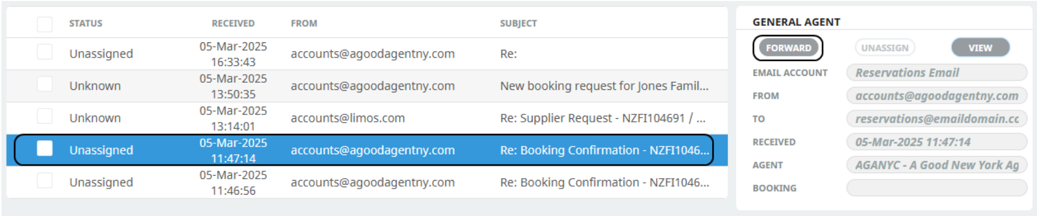
Forward an Email

1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Inbox**.

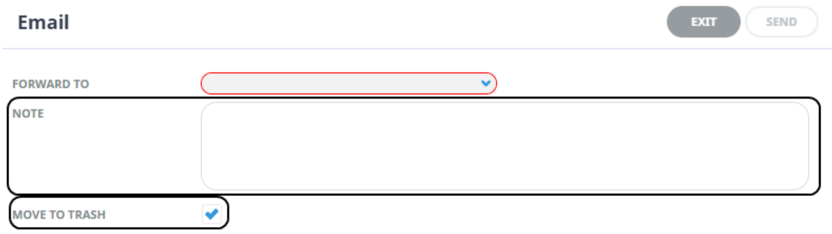
2. A list of emails displays. Expand the **Email Filter** to filter emails by Email Account, Date, Agent, Supplier, Booking Reference, Email Type or Email Status.

+ EMAIL FILTER

3. Highlight the Email and select **Forward**.



4. In the **Note field**, insert a message to the email recipient, by default the Move to Trash checkbox is ticked, to keep the email deselect the checkbox.



5. A confirmation dialog displays. *Forwarding this email will remove it from any Booking/Supplier/Agent* Select **Yes** to confirm, or **No** to return to the Inbox.

6. The email is received in the **recipients email account**, the recipient can view the contents of the original email, by clicking the ellipsis.

About Email Management Fields

Email Filter

Emails can be viewed and updated in bulk by selecting the required filters. Below are the filter selections available when using the Email Management feature. This provides a convenient solution to processing unassigned emails or moving received emails to the Trash menu.

Email Account

This selection filters emails by an available email account.

Date From & To

The date the email was imported into Tourplan. If selection for a range of dates is entered, Emails that fall within the date range provided will be display in the Email list.

Agent

When a specific Agent is selected, a list of emails is returned for that Agent only.

Supplier

When a specific Supplier is selected, a list of emails is returned for that Supplier only.

Booking Ref

When a booking reference is defined, a list of emails is returned for that booking only.

Email Type

Filters by Email Type can be applied, the Email Type options are as follows:

- **All** - All Emails
- **Booking Agent** - Booking and Agent
- **Booking Supplier** - Booking and Supplier
- **Agent Email** - Agent Emails Only
- **Supplier Email** - Supplier Emails Only
- **General** - Not linked to an Agent, Supplier or Booking

Email Status

By default, Error and Unassigned are selected however these can be changed by clicking on the required check boxes.

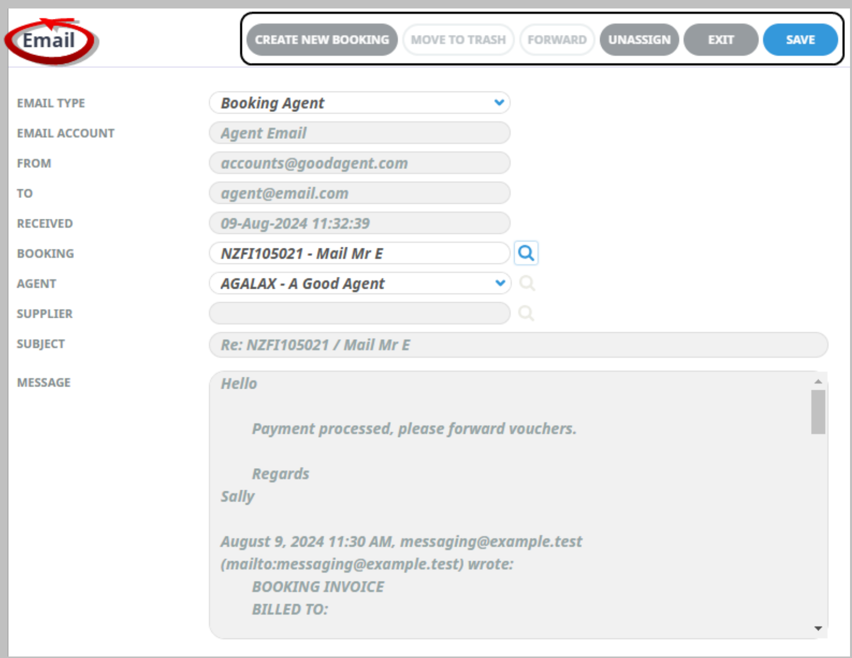
- **All** - displays all emails
- **Assigned** - displays assigned emails
- **Error** - displays error emails
- **Unassigned** - displays unassigned emails

One or more selections is required to filter the email list.

About View Email Fields

Administrators view the content of the email message by highlighting an email in the list and selecting 'View'. From here emails can be assigned to bookings, agents, and/or suppliers. Emails can also be forwarded elsewhere or moved as unwanted emails to the Trash bin.

From the Email 'View' screen.



Buttons

Create New Booking - New Bookings can be created.

Move to Trash - Email messages can be moved to Trash.

Forward - Email messages can be forwarded to an external email account.

Unassign - Assigned email messages can be unassigned from the Booking, Agent or Supplier.

Exit - Closes the Email view.

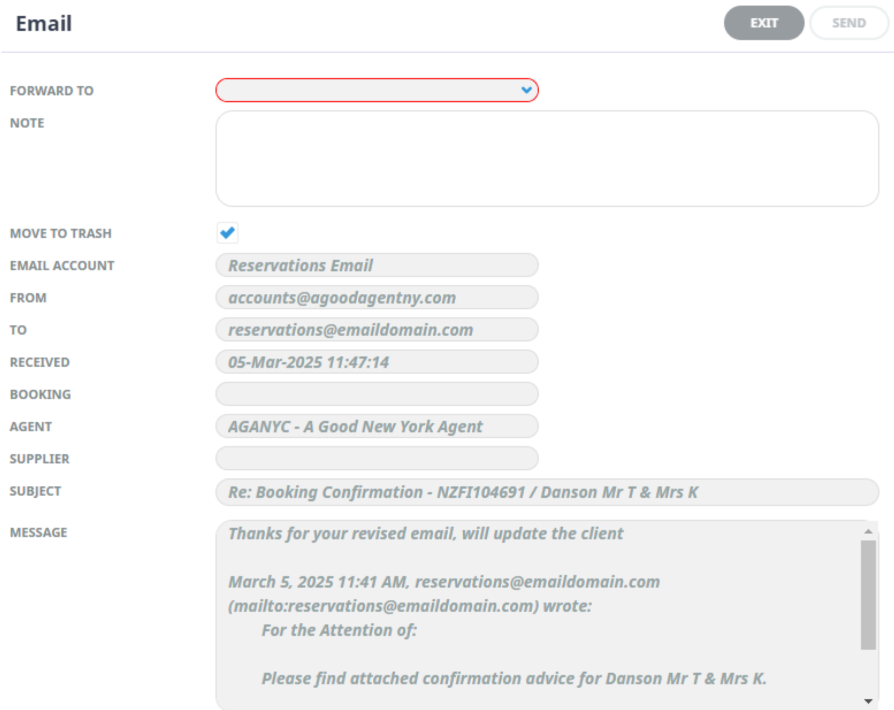
Save - Saves the changes.

Email Type

The email type selected enables different field selections and search functions.

- **Booking** - Enables the Booking field, allowing users to search for the required booking to assign the email to
- **Booking Agent** - Enables the Booking field, allowing users to search for the required booking to assign the email to. The Agent field populates from the attached booking agent.
- **Booking Supplier** - Enables the Booking field, allowing users to search for the required booking to assign the email to. The Supplier field populates a dropdown list of suppliers from the attached booking.
- **General** - Provides the ability to move the email to the Trash bin.
- **Agent Email** - Enables the Agent field, allowing users to search for the required debtor to assign the email to.
- **Supplier Email** - Enables the Supplier field, allowing users to search for the required creditor to assign the email to.

About Forward Email Fields



Forward To - A dropdown selection of available email address to forward to.

NOTE: A list of approved email accounts to forward emails to are pre-defined in the Code Setup, Email Account configuration. If no email accounts are listed, the Forward To dropdown in Email Management will be empty. For more information on the setup see Insert Button (Forward Email)

Note - A free format field to enter a message to the recipient of the forwarded email.

Move to Trash - By default this checkbox is selected, allowing simultaneous forwarding of the email and moving the email to the trash bin. Users can deselect to keep the email in the Inbox.

Remaining Fields - The content of the original email is visible onscreen as read only.

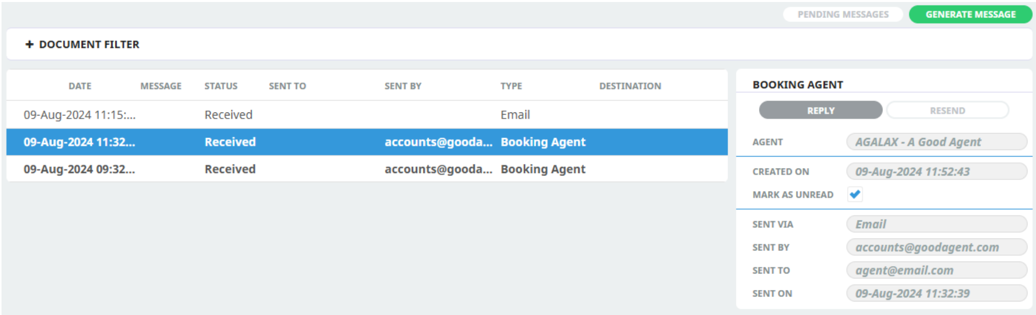
Replying to Emails

Imported emails are replied to from within the Documentation page of the Booking, Agent or Supplier.

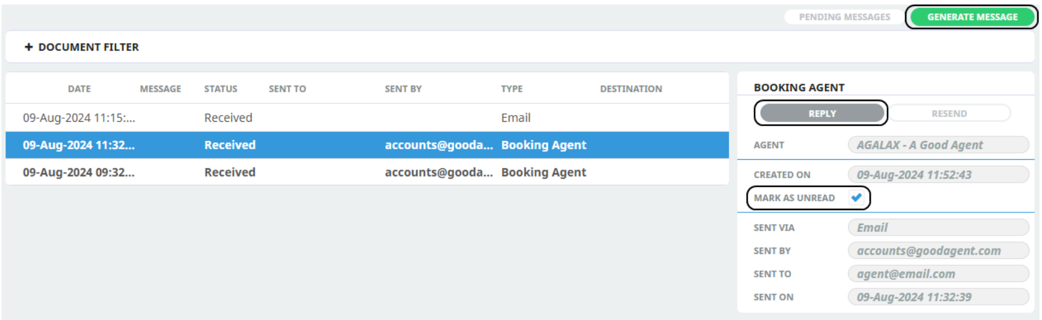
Administrators cannot reply to emails from the Email Management page.

Consultants View - Open Booking

1. Open **FITs**, search for the Booking. The received (now assigned) email displays when **Operations & Accounts > Documentation** Menu is selected.



2. From the booking, Consultants can **Reply**, **Generate a New Message** or mark the Email as **Unread**.



NOTE: Agent or Supplier emails are available from the Documentation menu when in the Debtor or Creditor applications.

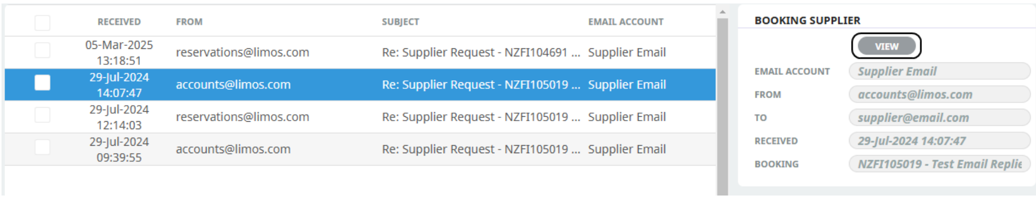
Trash

Imported emails are not deleted in Tourplan they are moved from the Inbox to a Trash menu. They appear in the Trash list where the email content can be viewed, or the email can be restored back into the Inbox.

View an email in Trash

1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Trash**.
2. A list of emails displays. Expand the **Email Filter** to filter emails *by Email Account, Date, Agent, Supplier, Booking Reference, or Email Type*.

3. Highlight the email line, and select **View**.

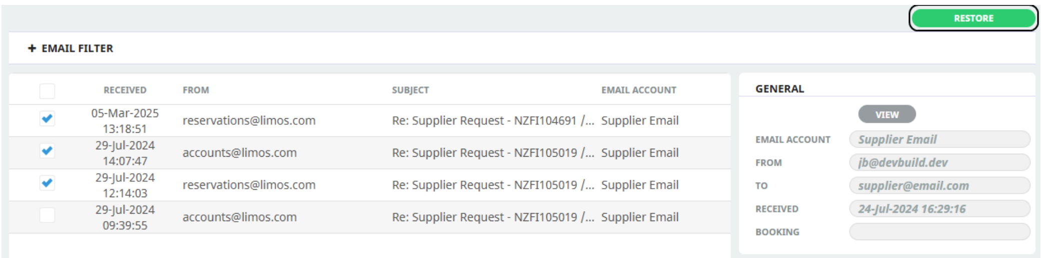


4. Click **Exit** to close.

Restore email back to the Inbox

1. From the Home menu, select **Home > Operations > Booking Operations > Email Management > Trash**.
2. A list of emails displays. Expand the **Email Filter** to filter emails *by Email Account, Date, Agent, Supplier, Booking Reference, Email Type*.

3. Check the box next to the Email(s) and select **Restore**.



4. The emails are moved to the Inbox.

Queue Management

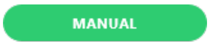
If user organisations are using internal messaging queues they can be monitored, actioned and printed using Queue Management functions. Filters are selected and a list of queues results will show for processing of tagged queues.

This function allows users to update the queue statuses and send the messages to the entity that owns the queued message. Queue management filters can also be saved so that repeatable tasks can be easily used.

Queue Management

1. From the Home menu, select **Home > Operations > Booking Operations > Queue Management**.

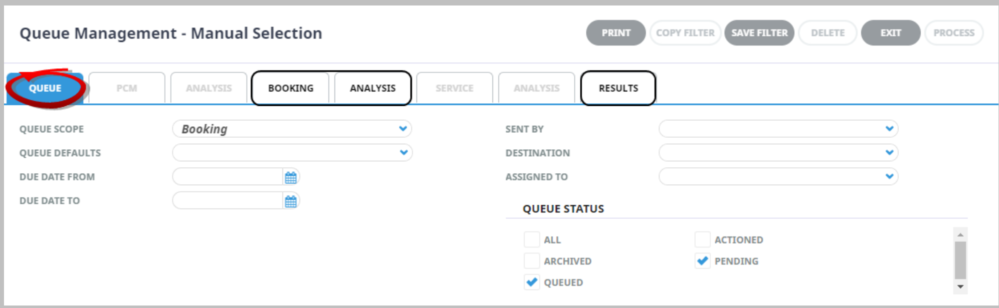
2. Click **Manual.**

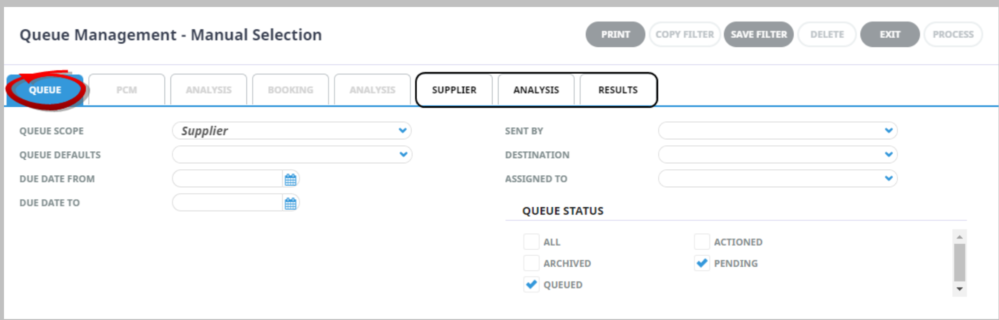
3. On the blank **Queue Management - Manual Selection** screen, the **Queue Tab** will open, select the required filters from the field selections available within the **Queue Tab**. View Queue Management Fields to learn more about all the field selections available, or view the individual tab filters; Queue Tab, PCM Tab, Analysis Tab (PCM), Booking Tab, Analysis Tab (Booking and Agent), Service Tab, Analysis Tab (Supplier and Product) or Results Tab.

   NOTE: The Queue Scope field triggers the Tab selections available.

   For example: Selecting a Queue Scope of Booking, will allow selections within the Booking and the (Booking) Analysis Tab.

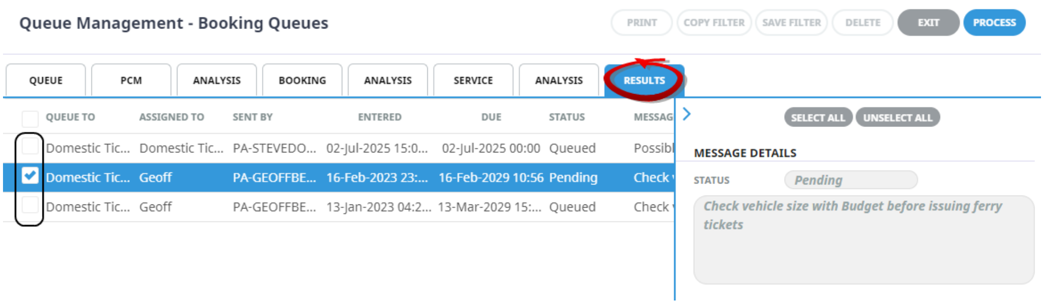
   

   Where as selecting a Queue Scope of Supplier, will allow selections within the Supplier and the (Supplier) Analysis Tab.

4. Check the **completed screens**.

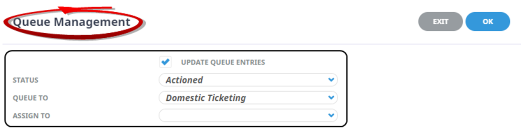
5. Click on the **Results Tab**, Select the Queue Messages using the *Selected* check box next to each Queue Message, or use *Select All*.



6. Click **Process**.

7. On the Queue Management screen, click **Update Queue Entries**. The status of the queues can be marked as; actioned, archived, pending or queued.

   NOTE: A Queued Destination can be assigned to the queue to field or the queue can be assigned to a colleague.



8. Click **OK** to keep the changes and save or update the entry.

9. Click **Exit** to discard any changes.

About Queue Management Booking Fields

Queue Tab

This is the default tab that will open when selecting to insert a Manual Queue Management.

Queue Scope

This selection will trigger the availability of the filter tabs. Selection for one of the following can occur; either leave unassigned or select Booking, Booking Service Line, PCM, PCM Service Line, Agent, Supplier, User or General.

Queue Defaults

A pre-set queue destination may be available based on the Queue Scope selection. Selecting a queue default here will select all message queues using this default.

Due Date From/To

This is the date the Queue was due on. If selection for a range of dates is entered here Queues that fall within the date range provided will be display in the results screen.

Sent By

A specific colleague or user can be selected to return queues for this user.

Destination

A specific destination or group of user can be selected to return queues for this destination.

Assigned To

A specific colleague or user can be selected to return queues that are assigned to this user.

Queue Status

By default, Queued and Pending are selected however these can be changed by clicking on the required check boxes.

Booking Tab

The booking tab is triggered when Queue Scope selection is one of the following:

- (Unassigned)
- Booking
- Booking Service Line
- General

The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes selection for Booking Status, Branch and or Department.

Last Worked Date From/To

This is the date the booking was worked on. If selection for a range of dates is entered here Queue Messages for bookings that have a last worked date within the date range provided will be display in the results screen.

Travel Date From/To

Travel date for bookings is the date that appears in the header of a booking this is generally the date of the first service. This date range field is used to select bookings with a specific date, or Queue Entries for bookings that fall within a range of travel dates.

Agent From/To

Used to select Queue Messages with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select Queue Messages with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Date Entered From/To

This is the date the booking was entered. If selection for a range of dates is entered here Queue Messages for bookings that were created within the date range provided will be display in the results screen.

Consultant

The consultant code attached to the bookings whose messages are to be output.

Booking Status

By default, all booking statuses are checked and bookings that have those status will be selected. Uncheck statuses that are not required.

Branch

By default, all branches are checked and bookings that have those branches will be selected.

Department

By default all departments are checked, bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

Service Tab

The service tab is triggered when Queue Scope selection is one of the following:

- (Unassigned)
- Booking Service Line
- PCM Service Line
- General

The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes check box selection for Service Status, Service (Type) and or Voucher Status.

Service Date From/To

This is the date of the service within a booking. If selection for a range of dates is entered here Queue Messages for services that fall within the date range provided will be display in the results screen.

Supplier From/To

Used to select Queue Messages with a specific, or range of, supplier(s) codes matching the selection.

Master Supplier From/To

Used to select Queue Messages with a specific, or range of, Master Supplier code(s) matching the selection.

Location

The Queue Message for a location code attached to the service.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked and Queue Messages for those service types that have been selected will return results.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier Analysis codes that can be attached to the Supplier.

Product Analysis

The bottom two rows of this tab are the 6 Product Analysis codes. These are service level selections.

Analysis fields can be expanded or minimised by using the + or - function.

Agent Tab

The agent tab is triggered when Queue Scope selection is:

- Agent

Agent From/To

Used to select Queue Messages with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select Queue Messages with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Analysis Tab (Agent Analysis)

Agent Analysis

The rows of this tab are the 6 Agent Analysis codes.

Analysis fields can be expanded or minimised by using the + or - function.

PCM Tab

The PCM tab is triggered when Queue Scope selection is one of the following:

- (Unassigned)
- PCM
- PCM Service Line
- General

The top section includes 'PCM Header' field selections. The bottom section includes selection for PCM Statuses.

Name From

This field will be empty. If you know the name of the PCM you can search for the start of the PCM name.

Name Contains

As with Name From, this field will be empty. This is a string search facility; i.e. it will find PCMs matching any combination of consecutive characters entered in the field, regardless of where in the PCM name the string occurs.

Agent

Used to select Queue Messages with a specific, agent code in the PCM header matching the selection.

Based Date From/To

This is the base date selected when the PCM was entered. If selection for a range of dates is entered here Queue Messages for PCM that fall within the date range provided will be display in the results screen.

Date Entered From/To

This is the date the PCM was entered. If selection for a range of dates is entered here Queue Messages for PCM that were created (or entered) within the date range provided will be display in the results screen.

PCM Status

By default, all PCM statuses are checked and PCMs that have those status will be selected. Un-check any statuses that are not required.

Analysis Tab (PCM Analysis)

PCM Analysis

The rows of this tab are the 6 PCM Analysis codes. These are PCM level selections.

Analysis fields can be expanded or minimised by using the + or - function.

Results Tab

Selected check boxes

Queues can be individually selected.

Select All/Unselect All

Select all queues found, or un-select all queues selected.

Additional Message/Booking/PCM/Service Details

When a queue message is highlighted, additional details relating to that message will display on the right of the screen. Depending on the queue type the details sections may include:

- Message Details
- Booking Details
- PCM Details
- Service Details

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Queue Management, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Queue Management Settings

Update Queue Entries

Queue Management information can be updated.

Status

Selection from Actioned, Archived, Pending or Queued.

Queue To

Selection from all available queues (if Queue Groups have been setup).

Assign To

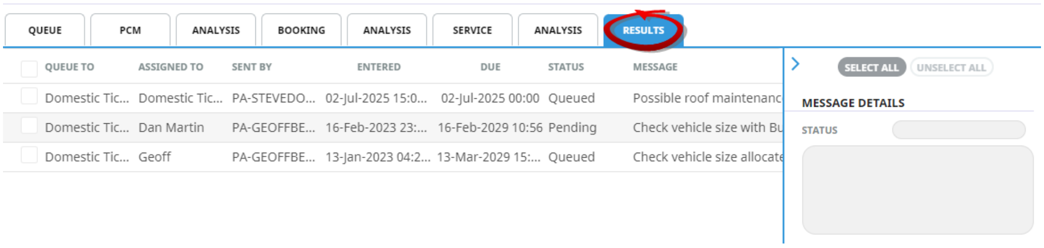
Selection from all available Tourplan users, filtered by the 'Queue To' selection (if used).

Open an Existing Queue

A list of Queue results can be obtained when searching for the Queue Default. Users can view results as to when the Queue was sent, to whom and the status of the queue from within the results screen. Queues can be printed or downloaded to a CSV or PDF file.

Find Queue Results

1. From the Home menu, select **Home > Operations > Booking Operations > Queue Management**.
2. A list of previously created Queue Descriptions will display, click on the Queue Description line.
3. Select the **Results Tab** to display a list of Queue Messages using the Queue Description.



Printing Queues

1. Open the Queue Description on Screen. (Follow Procedure 1 and 2 from Find Queue Results - Procedure above)
2. Users can print the list of queues on screen by selecting **Print**.

3. Further options are made available **to**:

a. 'View' results from a report on screen.
b. 'Download CSV' file.
c. 'Download PDF' file.

4. Click **Exit** to discard any changes.

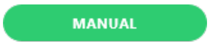
Save Queue Management Filters

Common or frequently used Queue Management Filters can be saved and given a Description so that repeatable tasks are easily accomplished.

Queue Management

1. From the Home menu, select **Home > Operations > Booking Operations > Queue Management**.

2. Click **Manual.**



3. On the blank Queue Management - Manual Selection screen, the **Queue Tab** will open, select the required filters from the field selections available within the **Queue Tab**.

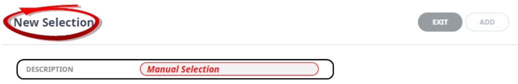
   View Queue Management Fields to learn more about all the field selections available, or view the individual tab filters; Queue Tab, PCM Tab, Analysis Tab (PCM), Booking Tab, Analysis Tab (Booking and Agent), Service Tab, Analysis Tab (Supplier and Product) or Results Tab

   NOTE: The Queue Scope field triggers the Tab selections available.

4. Check the **completed screens**.
5. Click on the **Results Tab**.

6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selections a 'Description'.



8. Click **Add** to add this filter description.

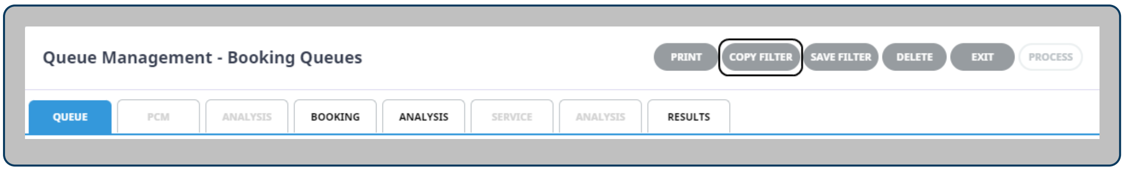
9. Click **Exit** to discard any changes.
10. NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Queue Management. If selected for future Queue Management processing - results will be returned based on the saved filters.
11. If **Add** is selected you will return to the results screen, where you can select to **Process** Queues (following from Step 5 in the previous procedure), or **Exit**.

> The procedures just described are sufficient to create manual filter criteria to monitor messaging queues from and to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

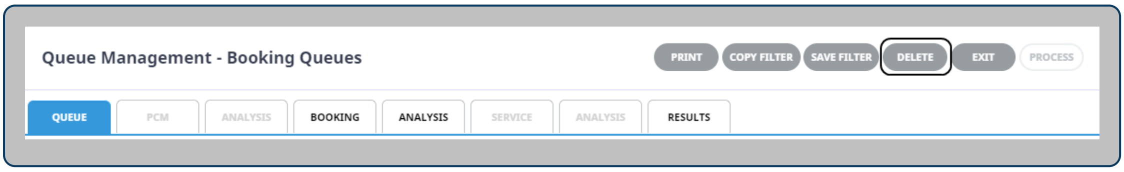
Copy Queue Management Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Results Tab. Users can copy existing filters by using **Copy Filters**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Queue Management Filters

Deletion of Filter Descriptions is allowed, and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to delete, the filters will not be able to be retrieved again.



Recalculate Bookings

Recalculation of bookings can occur in bulk instead of booking by booking, selection of different fields will determine the bookings to be recalculated.

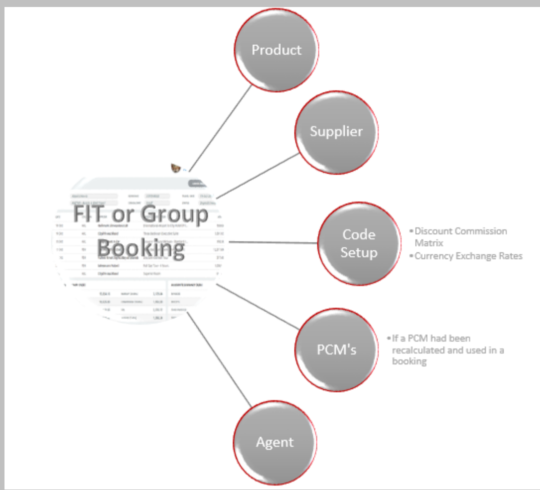
Selection can occur for

- All bookings
- FIT bookings
- Group bookings

Closed bookings can be included or excluded.

This can be useful when (e.g.) a decision has been made to update booking level information such as commissions, mark-up or exchange rates. When the recalculate booking function is used the system will apply any amendments made within the system that may be relevant to the booking.

If changes are made to any of the applications noted below, the Bookings selected would be recalculated to reflect the change.



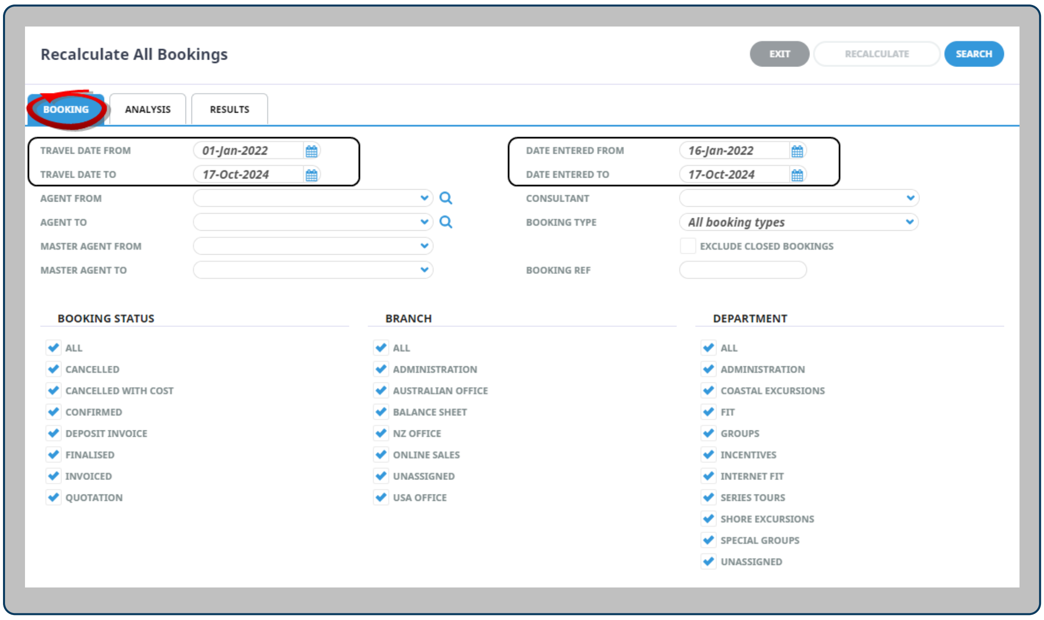
Recalculate Bookings

1. From the Home menu, select **Home > Operations > Booking Operations > Recalculate Bookings**.

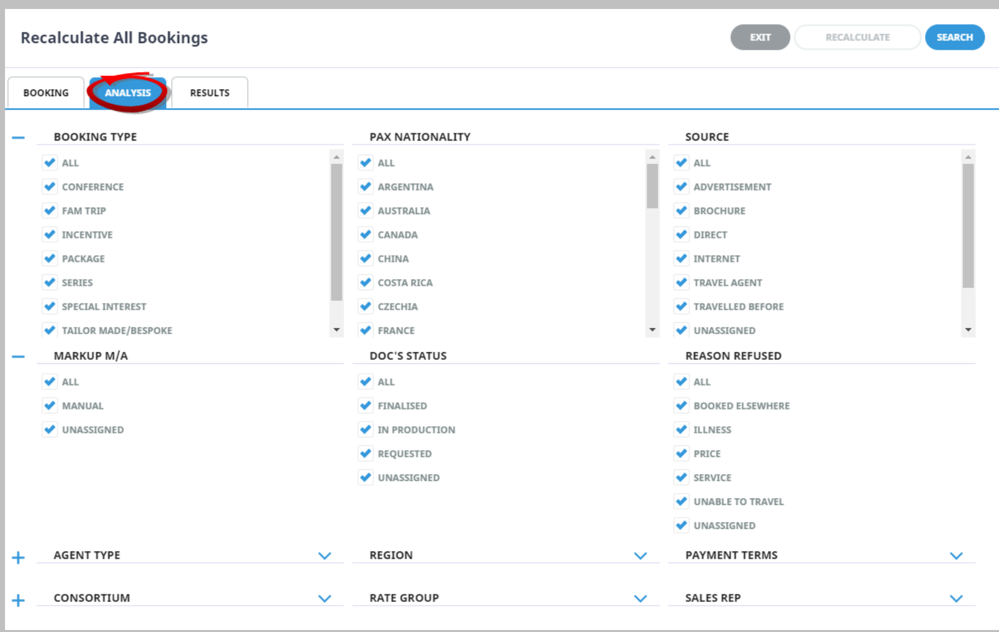
2. On the blank **Recalculate All Bookings** screen, the **Booking Tab** will open, select the required filters from the field selections available within the **Booking Tab**, and the **Analysis Tab**. Click on the links to find out more about the fields Booking Tab, Analysis Tab.

   NOTE: Travel Date From/To, and Date Entered From/To fields are defaulted to system settings, these fields can be amended to suit recalculation requirements.

   Filters used in this screen capture are examples used for Training purposes, Statuses, Branch and Department selection will reflect users own organisational fields.



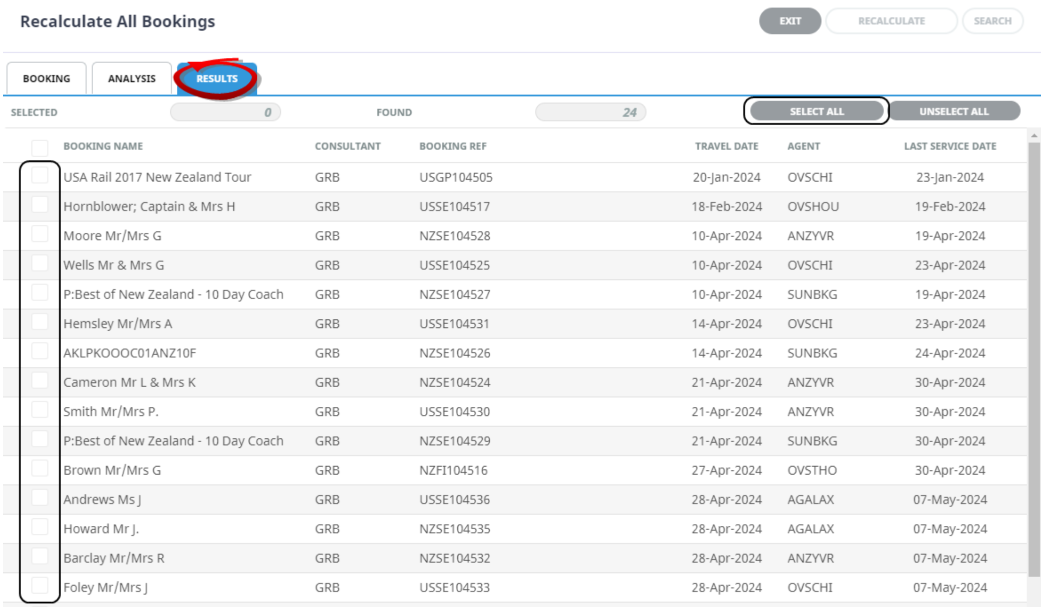
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



3. Check the **completed screens**.

4. Click on the **Results Tab**. Select the services using the *Select* check-boxes next to each service, or

use *Select All*. Click on the link to find out more about the Results fields.

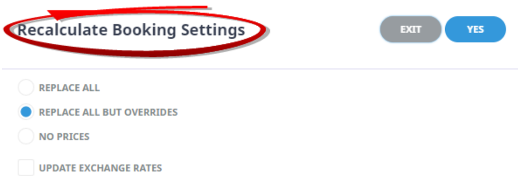


BOOKING NAME	CONSULTANT	BOOKING REF	TRAVEL DATE	AGENT	LAST SERVICE DATE
USA Rail 2017 New Zealand Tour	GRB	USGP104505	20-Jan-2024	OVSCHI	23-Jan-2024
Hornblower; Captain & Mrs H	GRB	USSE104517	18-Feb-2024	OVSHOU	19-Feb-2024
Moore Mr/Mrs G	GRB	NZSE104528	10-Apr-2024	ANZYVR	19-Apr-2024
Wells Mr & Mrs G	GRB	USSE104525	10-Apr-2024	OVSCHI	23-Apr-2024
P:Best of New Zealand - 10 Day Coach	GRB	NZSE104527	10-Apr-2024	SUNBKG	19-Apr-2024
Hemsley Mr/Mrs A	GRB	USSE104531	14-Apr-2024	OVSCHI	23-Apr-2024
AKLPKOOOC01ANZ10F	GRB	NZSE104526	14-Apr-2024	SUNBKG	24-Apr-2024
Cameron Mr L & Mrs K	GRB	NZSE104524	21-Apr-2024	ANZYVR	30-Apr-2024
Smith Mr/Mrs P.	GRB	USSE104530	21-Apr-2024	ANZYVR	30-Apr-2024
P:Best of New Zealand - 10 Day Coach	GRB	NZSE104529	21-Apr-2024	SUNBKG	30-Apr-2024
Brown Mr/Mrs G	GRB	NZFI104516	27-Apr-2024	OVSTHO	30-Apr-2024
Andrews Ms J	GRB	USSE104536	28-Apr-2024	AGALAX	07-May-2024
Howard Mr J.	GRB	NZSE104535	28-Apr-2024	AGALAX	07-May-2024
Barclay Mr/Mrs R	GRB	NZSE104532	28-Apr-2024	ANZYVR	07-May-2024
Foley Mr/Mrs J	GRB	USSE104533	28-Apr-2024	OVSCHI	07-May-2024

5. If you want to recalculate, click **Recalculate**.

6. On the **Recalculate Booking Settings** screen, check the required setting, and select if you want the system to update the exchange rates.

NOTE: The system will default to *'Replace All But Overrides'*, Click on the link to find out more about the Recalculate Booking Settings.



7. To keep the changes, click **Yes**.

8. Click **Exit** to discard any changes.

9. If **'OK'** was selected a **Recalculation Summary** will appear with the number of successful bookings to be recalculated.

10. Click **OK** to keep the changes and save or update the entry.

Booking Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes selection for Booking Status, Service Status, Branch and or Department.

Travel Date From/To

Used to select services with a specific, or range of, travel dates of the bookings to be selected.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Date Entered From/To

The booking entered date(s) of the bookings to be selected.

Consultant

The consultant code attached to the bookings whose messages are to be output.

Booking Types

Drop down selection for the type of bookings to be included, selection includes:

- All booking types - bookings from either FIT bookings or Group bookings will be selected.
- FIT's - those bookings that are FIT bookings will be selected.
- Groups - those bookings that are Group bookings will be selected.

Exclude Closed Bookings

Use this check box if closed bookings are to be excluded from search results.

Booking Ref

Used to select a specific booking reference.

Booking Status

By default, all booking statuses are checked and bookings that have those status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and bookings that have those branches will be selected.

Department

By default all departments are checked, bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user companys system.

Results Tab

Selected check-boxes

Bookings can be individually selected.

Select All/Unselect All

Select all bookings found, or un-select all bookings selected.

Selected

The cell to the right of this heading will provide you with the number of bookings that have been selected.

Found

The system will provide you with the number of bookings found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Recalculate Bookings, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Recalculation Settings

Replace All

Revisits the Tourplan Database and re-costs all services.

All Except Overrides

Revisits the Tourplan Database however does not re-cost services where the original product rates were manually overridden. Manually overridden values need to be confirmed with 'OK'.

No Prices

Recalculates the totals based on the existing service line values.

Update Exchange Rates

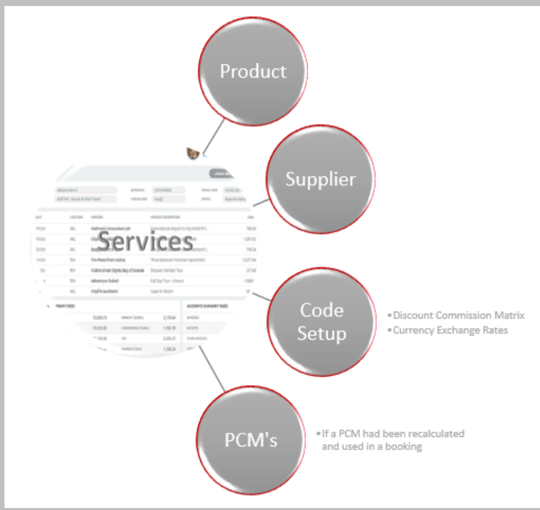
When the booking services are re-costed should Tourplan Continue to use the previous Exchange Rates (unchecked) or use the Exchange Rates from the Tourplan Code Setup Module.

Recalculate Services

Recalculation of Services can occur in bulk instead of booking by booking, selection of different fields will determine the Services to be recalculated.

Selection can occur for services included in:

- FIT bookings.
- Group bookings.

> If changes are made to any of the applications noted below, the services would be recalculated to reflect the change. Booking totals would be recalculated to reflect changes made to services within the booking.
>
> 
>

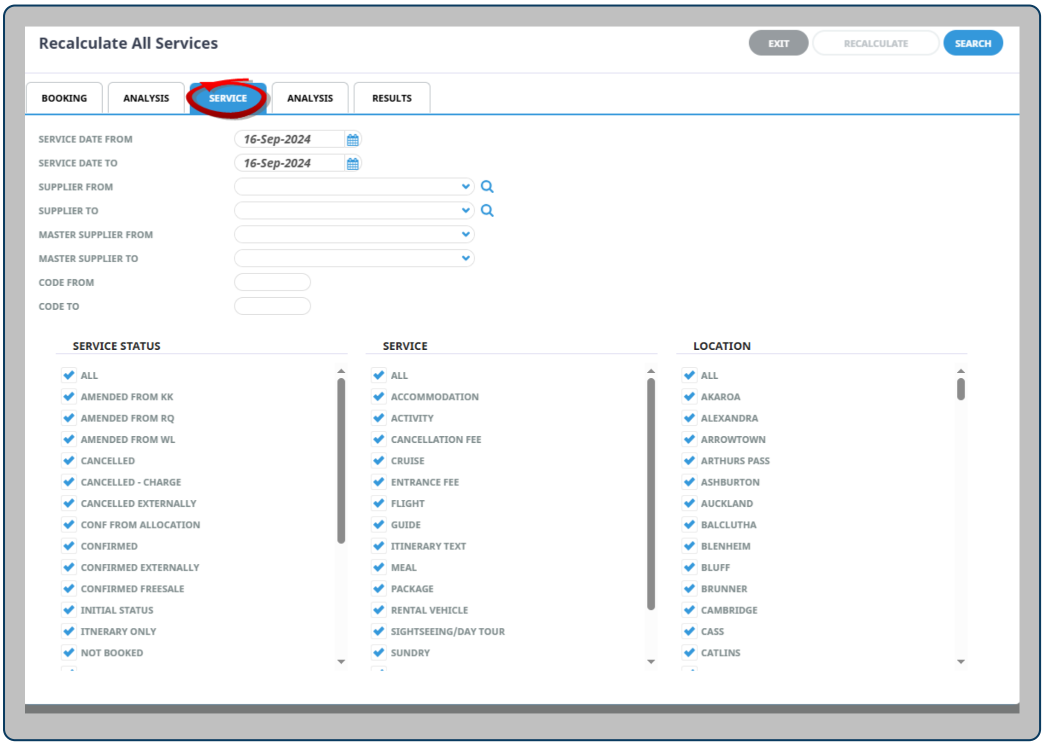
Recalculate All Services

1. From the Home menu, select **Home > Operations > Booking Operations > Recalculate Services**.

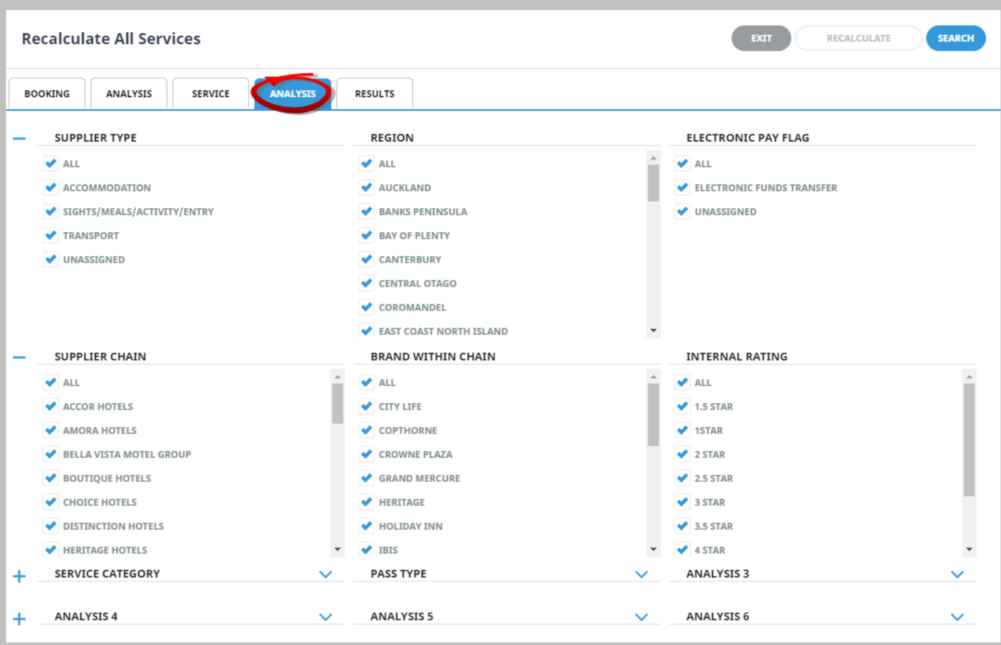
2. On the blank **Recalculate All Services** screen, the **Services Tab** will open, select the required filters from the field selections available within the **Services Tab**,and the **Analysis Tab**.
Additional booking filters are available within the **Booking** and (Booking) **Analysis** tabs. Click on the links to find out more about the fields Booking Tab, Analysis Tab (Booking and Agent), Service Tab, and Analysis Tab (Supplier and Product).

   NOTE: Service Date From/To are defaulted to today's date, these fields can be amended to suit recalculation requirements.

   > Filters used in this screen capture are examples used for Training purposes. Service Statuses & Service Type selection will reflect users own organisational fields.



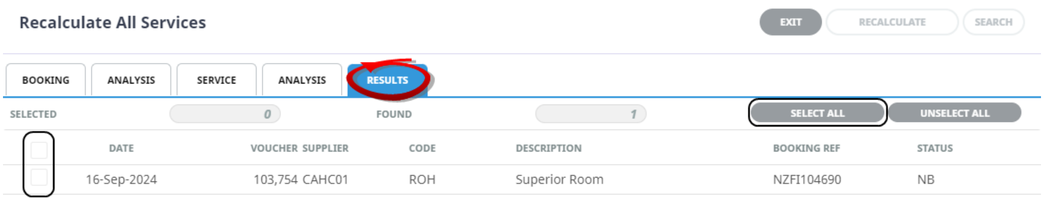
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



3. Check the **completed screens**.

4. Click on the **Results Tab**. Select the services using the *Select* check boxes next to each service, or

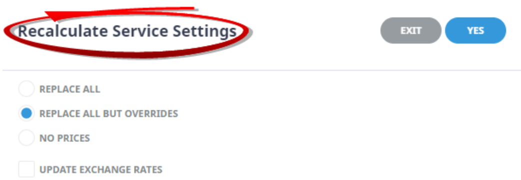
use *Select All*. Click on the link to find out more about the Results fields.



5. If you want to recalculate, click **Recalculate**.

6. On the **Recalculate Service Settings** screen, check the required setting, and select if you want the system to update the exchange rates. Click on the link to find out more about the Recalculate settings.

   NOTE: The system will default to Replace All But Overrides.



7. To keep the changes, click **Yes**.

8. Click **Exit** to discard any changes.
9. If '**OK**' was selected a **Recalculation Summary** will appear with the number of successful bookings to be recalculated.

10. Click **OK** to keep the changes and save or update the entry.

About Recalculate All Services Fields

Booking Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes selection for Booking Status, Service Status, Branch and or Department.

Travel Date From/To

Used to select services with a specific, or range of, travel dates of the bookings to be selected.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Date Entered From/To

The booking entered date(s) of the bookings to be selected.

Consultant

The consultant code attached to the bookings whose messages are to be output.

Booking Types

Drop down selection for the type of bookings to work with includes:

- All booking types - bookings from either FIT bookings or Group bookings will be selected.
- FIT's - those bookings that are FIT bookings will be selected.
- Groups - those bookings that are Group bookings will be selected.

Booking Ref

Used to select a specific booking reference.

Booking Status

By default, all booking statuses are checked and bookings that have those status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and bookings that have those branches will be selected.

Department

By default all departments are checked, bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user companys system.

Service Tab

The services tab will open by default.

Services Date From/To

Used to select services with a specific, or range of, service dates of the bookings to be selected.

Supplier From/To

Used to select services with a specific, or range of, supplier(s) codes that services are attached to.

Master Supplier From/To

Used to select services with a specific, or range of, Master Supplier code(s) in the booking header matching the selection.

Code From/To

Used to select services with a specific, or range of, Product code(s) in the booking header matching the selection.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service

By default, all service (types) are checked and bookings that have those services will be selected.

Location

Multi select checkboxes display results for services in the booking matching the location/s selected - by default all Locations are selected.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier level selections attached to the service.

Product Analysis

The bottom two rows of this tab are the 6 Product Analysis codes. These are Product Analysis codes attached to the booking services.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this user manual will vary and will display what has been setup in each users companies system.

Results Tab

Selected check boxes

Bookings can be individually selected.

Select All/Unselect All

Select all bookings found, or un-select all bookings selected.

Selected

The cell to the right of this heading will provide you with the number of bookings that have been selected.

Found

The system will provide you with the number of bookings found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Recalculate All Services, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Recalculate All Services Settings

Replace All

Revisits the Tourplan Database and re-costs all services.

All Except Overrides

Revisits the Tourplan Database however does not re-cost services where the original product rates were manually overridden. Manually overridden values need to be confirmed with the OK Button.

No Prices

Recalculates the totals based on the existing service line values.

Update Exchange Rates

When the booking services are re-costed should Tourplan continue to use the previous exchange rates (unchecked) or use the exchange rates from the Tourplan Code Setup Module.

CHAPTER 4

Service Operations

The Service Operations Menu is where the Resource Assignment application is accessible from. The Service Operations menu also includes Update Pickup/Dropoff information and Substitute Services for Resource Assignments.

The Resource Assignment application enables resources that have been created in Code Setup to be assigned to booked services.

NOTE: The setting up of these resource codes is covered in the System Setup User Manual.

Assignments can be edited and re-assigned where necessary, providing users with the ability to shift services between assignments.

Assignment can be reserved 'out of service' if for example a vehicle requires maintenance and cannot be used for a period of time using a reserve resources function. Manifests can be printed from within resource assignments for drivers and/or guides to receive an accurate passenger manifest.

This chapter will take you through setting up new assignments, editing existing assignments including bulk updating or substituting services. How to print manifests, join services or share costs across multiple bookings.

In this chapter ...

TOURPLAN

Resource Assignment

There are three resource "types" available and the most common resource descriptions are Vehicles, Drivers and Guides.

Assignments can be:

- Edited and re-assigned where necessary, providing users with the ability to shift services between assignments.
- Reserved 'out of service' if for example a vehicle requires maintenance and cannot be used for a period of time using a reserve resources function.
- Manifests can be printed from within resource assignments, for drivers and/or guides to receive an accurate passenger manifest.

The Resource Assignment application allows organisations to configure the individual set up of assignments to suit specific business operations. The setup requirements are dependant on the organisations resources and services offered.

It's because of the flexibility with assignments that Tourplan provides unique setup options. We define the use of Resource Assignment types as; Single Task, Independent Services, or Hop on Hop off.

An explanation on the different Tourplan definitions of these types of services are provided on the following pages.

If you are unsure on the setup type suited for your organisations operational requirements we suggest contacting your local Tourplan Support Team, or speaking with a member of the Tourplan Training Team who will be able to guide you on the appropriate settings.

Single Task

All services within the assignment are treated as a single task for the resource assigned to them. Any minimum or maximum passenger restrictions will be based on the total number of passengers on the service assigned.

A typical use for this type of assignment would be the consolidation of transfers or sight-seeing services. For example you may have 7 passengers booked across many bookings that require an airport to city transfer. You are providing a single assignment to transfer all passengers. The total sum of all passengers using this assignment will need to fit within the assigned vehicle.

Transfer	Pax	Total Number of Passengers Assigned to the Vehicle
Collect Guest A + B from Airport and drop off at Hotel A		
Collect Guest C + D from Airport and drop off at Hotel A		
Collect Guest E + F + G from Airport and drop off at Hotel B		

Independent Service

Each service on the assignment is to be operated independently. This type of assignment would be used when you are assigning resources on a daily/weekly basis and each service has a task.

A typical use for this assignment would be groups of passengers where the service of the assignment is to be completed before the next service is started.

For example this assignment is required to complete three tasks:

- Transfer 1: collect 2 passengers from the airport and transfers at Hotel A
- Transfer 2: collect 2 guests from Hotel B and transfer at Airport
- Transfer 3: collect 6 passengers from Hotel C and transfers at Activity A

Each transfer would be completed before collecting the next transfer. Pick-up and drop off times are used for this type of assignment, so that the resource is not double booked.

Transfer	Pax	Total Number of Passengers Assigned to the Vehicle
Collect Guest A + B from Airport and drop off at Hotel A		
Collect Guest C + D from Hotel B and drop off at Airport		
Collect Guest E + F + G + H + I + J from Hotel C and drop off at Activity A		

Hop on Hop off

Multiple services are assigned that may or may not occur simultaneously so you have the situation where Vehicle 1 is assigned to multiple transfers that overlap.

In this example the total passenger count does not exceed 7 as this 'vehicle' assignment has a maximum seat capacity of 7. The assignment collects and drops guests to and from different locations where guests 'hop on and hop off' the same service. Pick up and drop off locations and times are used to effectively manage the resource.

Transfer	Pax		Total Number of Passengers Assigned to the Vehicle	
	Pick Up	Drop Off		
Collect Guest A + B from Airport				
Collect Guest C from Hotel A				
Drop off Guest A + B at Hotel A				
Collect Guest D + E + F from Hotel B				
Drop off Guest C at Airport				
Drop off Guest D + E + F at Activity A				

Assignment Maximum Vehicle Capacity is 7

Using Resource Assignment Categories

There is an alternative feature available to organisations who may require a resource assignment to involve more than one category. This is designed for organisations who may have another layer of resources to assign to a group or individual services.

For example; a common scenario is for passengers to be assigned to a particular vehicle, driver and guide for their service. Some organisations may wish to offer another meet and greet service provided by the tour operator, or perhaps a hotel representative is to be assigned on arrival. The traditional method of Resource Assignment setup would not allow two records to be held for one service as required in this situation.

Type	Definition
Using two (or more) categories	In this example all services within the assignment are treated as a single task. There are two traditional Vehicle + Driver/Guide assignments; two transfer services pick up guest from 5 different bookings and deliver them to their respective hotels. The passengers are assigned to vehicles with a capacity of 7 seats and a passenger manifest would be available for the driver/guide to operate these transfer services. There is also a hotel representative for each hotel who needs to meet with their respective passengers on arrival. Representative A has 10 passengers to meet and requires their own manifest from multiple transfer arrivals. Given that there is a requirement for two resource assignments to be allocated simultaneously, an additional category is created in system setup to cater for this occurrence.

Transfer	Pax	Total Number of Passengers Assigned to the Vehicle + Driver/Guide	Total Number of Passengers Assigned to (Category) 'Hotel Representative'		
			Representative A	Representative B	Representative C
Collect Guest A + B from Airport and drop off at Hotel A		Vehicle 1	Meet Guest A + B		
Collect Guest C + D from Airport and drop off at Hotel A			Meet Guest C + D		
Collect Guest E + F + G from Airport and drop off at Hotel B				Meet Guest E + F + G	
Collect Guest H + I + J + K + L + M from Airport and drop off at Hotel A		Vehicle 2	Meet Guest H + I + J + K + L + M		
Collect Guest N from Airport and drop off at Hotel C					Meet Guest N

Reserve Resources

The Resource Assignment application enables resources to be reserved, and it is possible to create an assignment that has no services attached to it. This is particularly useful where organisations may need to remove a vehicle from service for maintenance. The vehicle would then not be able to be assigned.

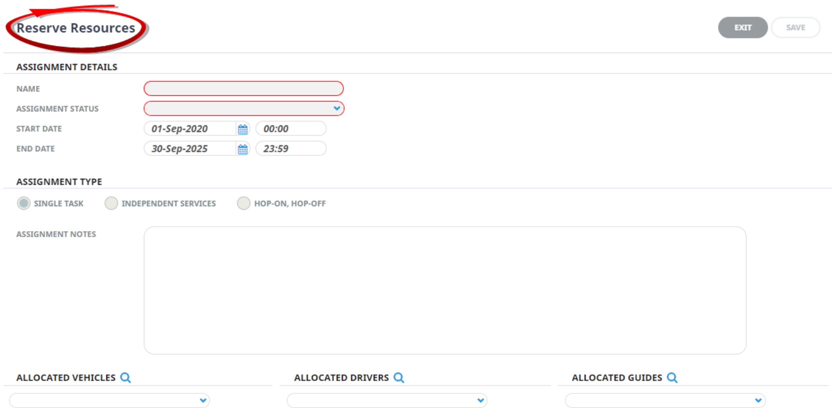
Users can also choose to allocate a resource for specific dates (start and end dates) where the resource can be reserved, these assignments can then be edited at a later date and have services attached to them if required.

Reserve Resources

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.

2. If you want to reserve a resource, click **Reserve Resources**.

3. On the **Reserve Resources** screen, enter a *Name*, and select an *Assignment Status*. Select a *Start Date* and *End Date* and if you know the *Start* and *EndTimes* enter these too.



4. Select a resource, vehicle, driver or guide.
5. Check the **completed screen**.

6. Click **Save** to keep the changes.

7. Click **Exit** to discard any changes.

Continue adding resources until you have completed the fleet of vehicles, number of drivers or guides necessary for your organisation.

The following procedures will include assigning the resources (once reservations have been put in place - either through the FITs or Groups booking applications).

New Assignment

Once services have been sold from within FIT or Group bookings passengers can be 'grouped' through the Resource Assignment application. Users search for services using the required filters and passengers are allocated a vehicle and driver, and if applicable a guide can also be assigned.

Multiple assignments can be generated collectively. The procedure below details how to create a new assignment for a single service. The actual procedure is the same for an independent service or a hop on hop off assignment, however multiple services need to be selected for the assignment type (Independent Services or Hop on Hop off) for check boxes to be available for selection.

If layers of resources are required for passengers to be assigned to more than one resource category. An additional field called Assignment Category can be enabled which provides the alternative solution. To enable this function multiple categories are configured in the System Setup application - see System Setup User Manual.

Create a New Assignment

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.

2. Click **New Assignment** to insert a new assignment.

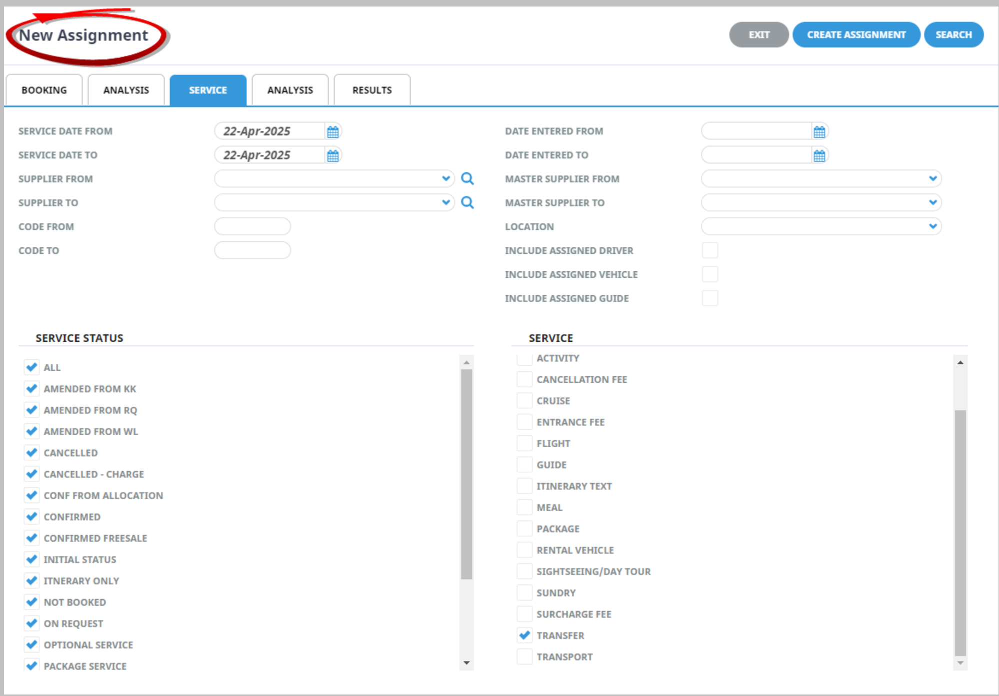
   

3. On the **New Assignment** screen, select *Service Date From/To*, and select required filters to return results based on the filters entered.

   NOTE: The Service Tab will open, required filters can be selected from within the Booking Tab, Analysis Tab (Booking and Agent), Service, or Analysis Tab (Supplier and Product). Click on the links to find out more about the fields.

   The Service From/To dates will default to today's date, these can be changed depending on the required dates.

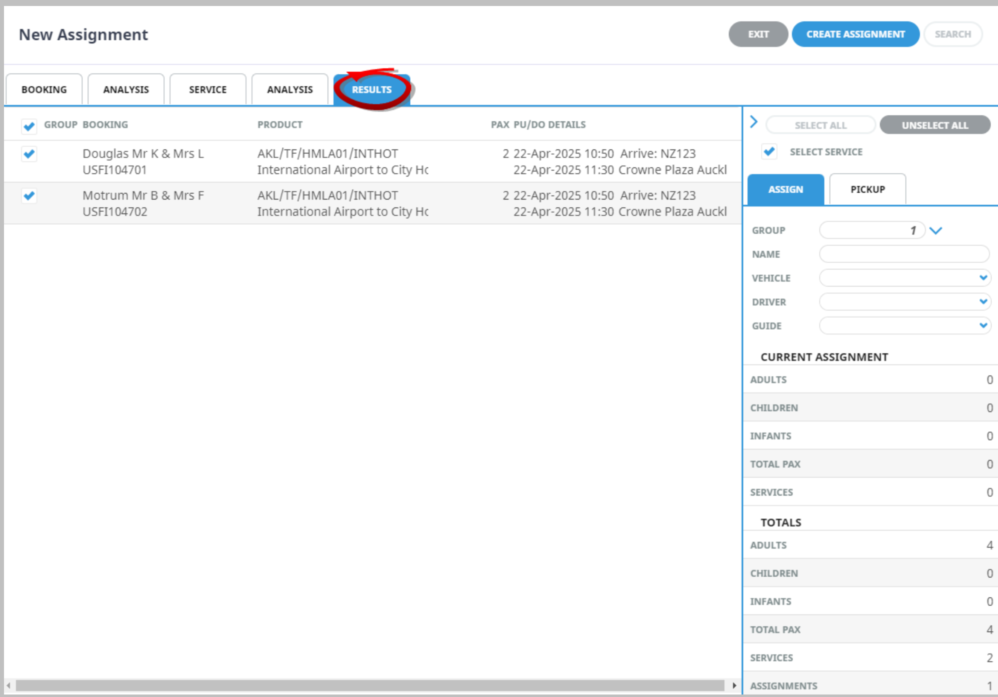
   In this example, the service dates from and to have been selected as 22 April 2025 and results are required for Transfer Services only.

4. Check the **completed screens**.

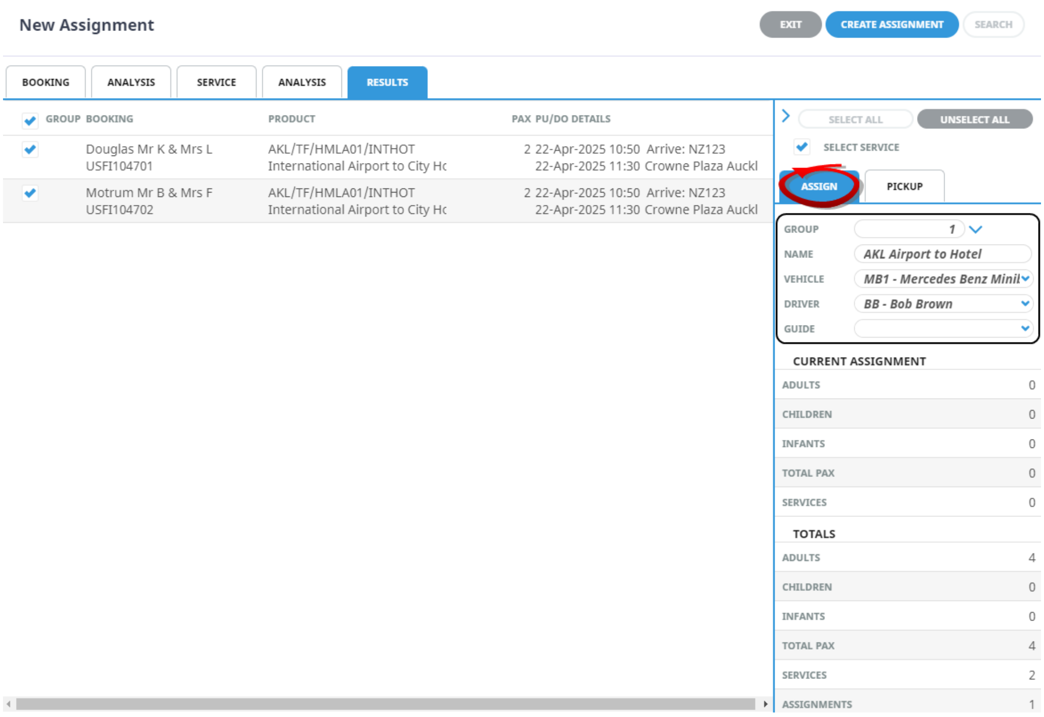
5. Click on the **Results Tab** or click **Search**. Select the bookings using the *Select* check boxes next to each booking or use *Select All*. Click on the link to find out more about the **Operations > Resource Assignment > New Assignment > Results Tab** fields.

In this example there are two bookings that have been selected, and the pick up and drop off details are available if they have been inserted into the booking. A Vehicle and Driver/Guide can be assigned for this group. Selection of group numbers is possible under the Pick up Tab group dropdown, in this case there is one group created in this assignment.

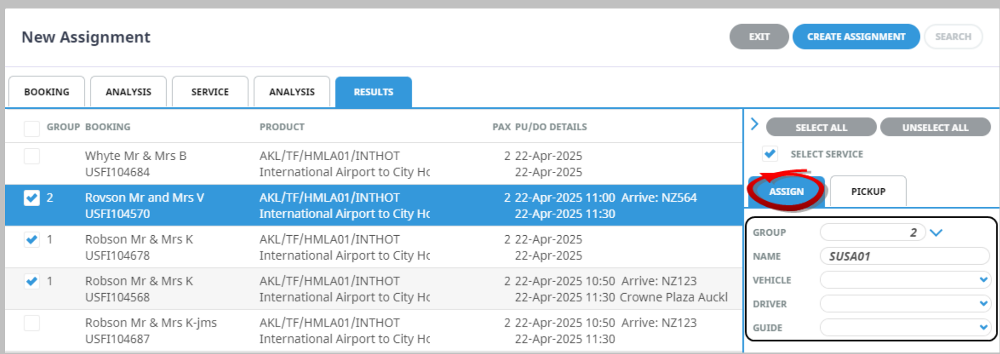


6. On the **Assign Tab**, enter an (Assignment) *Name*, and select a *Vehicle* and *Driver*.

NOTE: Bookings need to be selected before the assignment of Vehicle Drivers or Guides can occur. Click on the link to find out more about the Assign Tab fields.



In this example three bookings have been selected and two (group) assignments have been defined. A different vehicle, driver and or guide can be selected per group. The group number can be assigned by highlighting the booking and selecting the group number.

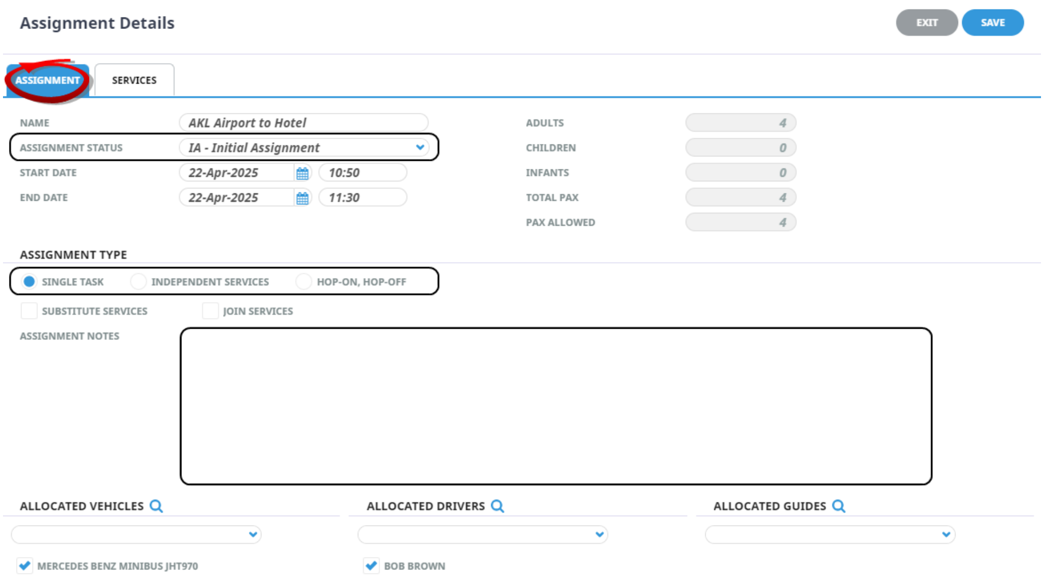


7. If the pick up details are known but not included in the booking, updates to the pick up/drop off fields can occur. Highlight the booking and select the **Pick Up Tab**. If known enter a *Pick up Time*, *Location* and a *Drop off Time and Location* enter any remarks and select **Edit Details**. Click on the link to find out more about the Pick up Tab fields.

In this example the pick up and drop off times and locations are known and have been updated.

8. Click **Create Assignment** to create an assignment.

9. On the **Assignment Details** screen, the **Assignment Tab** will open. The *Name*, *Assignment Status*, *Start/ End Dates* will default from the previous screen. These fields can be altered if necessary, but generally these would not require amendment. Select the *Assignment Type* required and enter any *Assignment Notes* that maybe applicable to your employees.



10. Check the **completed screens**.

11. Click **Save** to keep the changes.

    Or **Save All** if creating more than one Resource Assignment.

12. Click **Exit** to discard any changes.

About New Assignment Fields

NOTE: The fields discussed below assume that the assignment uses one category. Organisations that use resources allowing services to be assigned more than once will see subtle screen differences. Namely an assignment dropdown category field will be enabled and visible for selection throughout the procedure.

Service Tab

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Service Date From/To

These dates will default to todays date, specific date or date ranges are available for selection of services for the assignment.

Supplier From/To

Specific supplier or range of suppliers for selection of services for the assignment.

Code From/To

Specific (Product) Code from and to for selection of services for the assignment.

Date Entered From/To

Specific date range of when the booking was entered.

Master Supplier From/To

Specific master supplier or range of master suppliers for selection of services for the assignment.

Location

Specific location of a service for the assignment.

Service Status

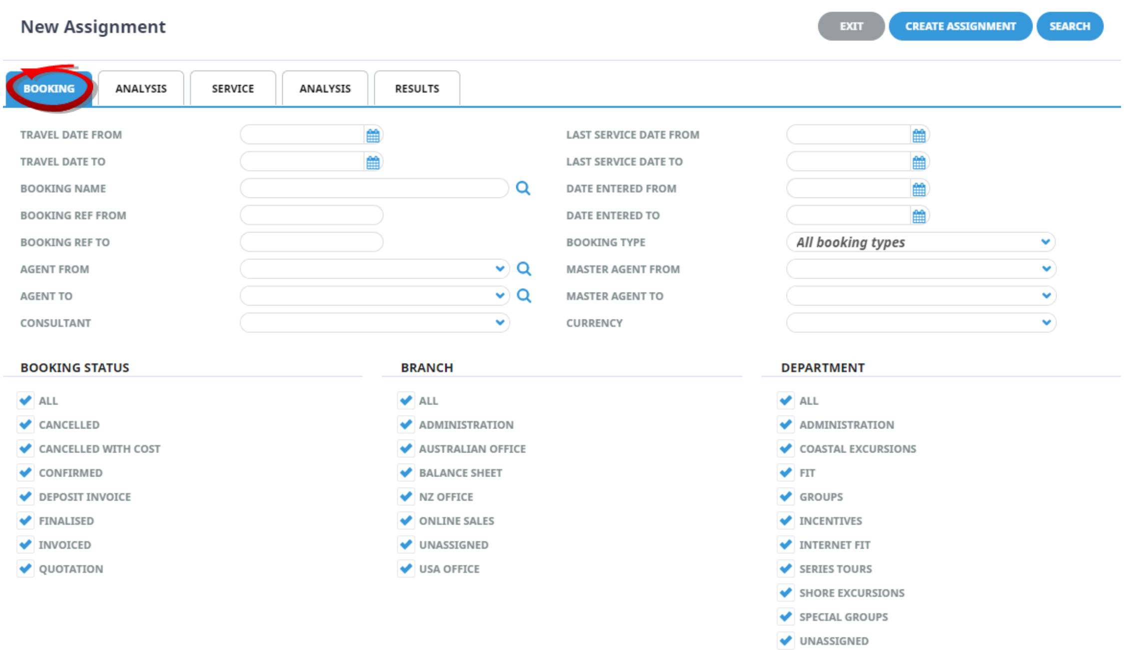
By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service

By default, all service (types) are checked and bookings that have those services will be selected.

NOTE: Additional filters can be used to filter the returned results.

Booking Tab



Travel Date From/To

Used to select services with a specific, or range of, travel dates of the bookings to be selected.

Booking Name

Selection for services for a specific booking name.

Booking Ref From/To

Used to select bookings with a specific, or range of, reference numbers that services are to be output from.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Consultant

This field filters by the consultant code attached to the bookings for the services to be selected.

Last Service Date From/To

Used to select services with a specific last service date.

Date Entered From/To

The booking entered date(s) of the services to be selected.

Booking Types

Drop-down selection for the type of bookings that services are to be output from selection includes:

- All booking types - services from either FIT bookings or Group bookings will be selected.
- FIT's - those services that are attached to FIT bookings will be selected.
- Groups - those services that are attached to Group bookings will be selected.

Master Agent From/To

Used to select services with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

NOTE: When a Master Agent (or range of Master Agents) is entered, Tourplan will find services in those bookings where the Agent(s) have the Master Agents attached to them. When searching on the Master Agent field, the Agent field should be left blank.

Currency

The booking currency of the services selected.

Booking Status

By default, all booking statuses are checked and services in bookings that have those status will be selected. Un-check statuses that are not required.

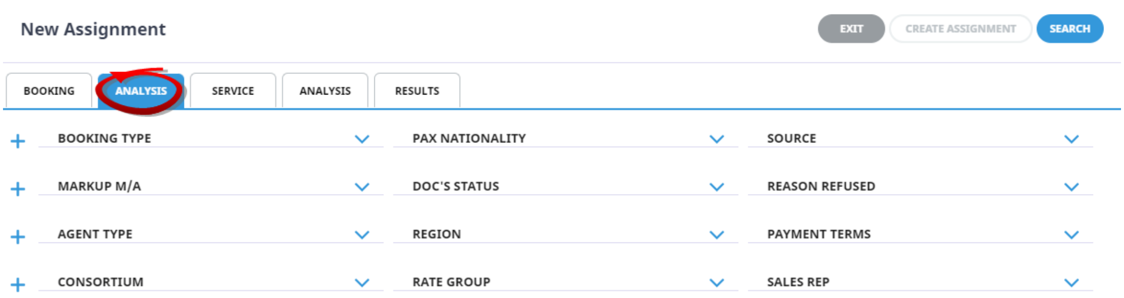
Branch

By default, all branches are checked and services in bookings that have those branches will be selected.

Department

By default all departments are checked, services in bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)



Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

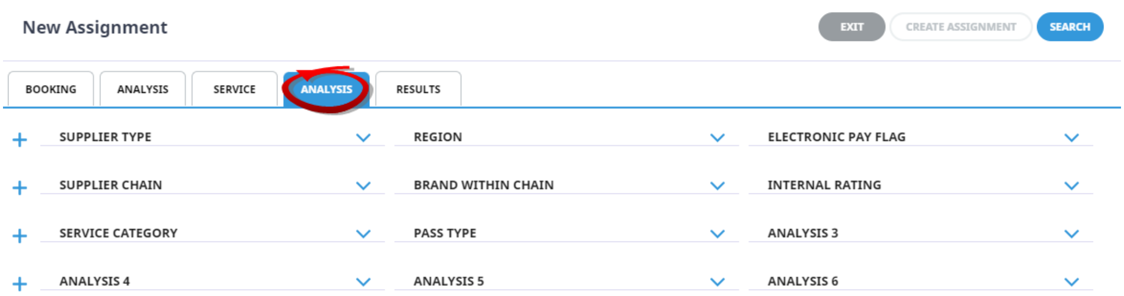
Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this user manual will vary and will display the headings that have been setup in each users companies system.

Analysis Tab (Supplier and Product Analysis)



Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier level selections attached to the service.

Product Analysis

The bottom two rows of this tab are the 6 Product Analysis codes. These are Product Analysis codes attached to the booking services.

Analysis fields can be expanded or minimised by using the + or - function.

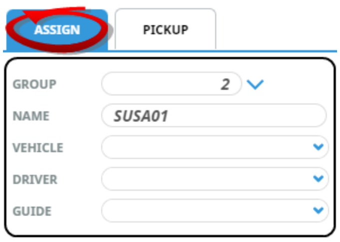
NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display headings that have been setup in each user company's system.

Results Tab

Selected check boxes

Bookings can be individually selected from the Results Tab (main screen) and grouped, the group value/number is assigned within the Assign tab (to the right of the screen). This is also where a vehicle can be assigned per group.

The screen capture below is showing group number 2, with a group name of SUSA01, a vehicle can be assigned to this group (group 2). A different vehicle could then be assigned to Group 1 by using the Group drop-down and selecting 1 assigning a different vehicle to this group.



Selected check boxes

Bookings can be individually selected.

Group

The Group number.

Booking

Name and reference number of booking.

Product

Product string and product description.

Pax

Number of pax booked per booking.

PU/DO Details

Pick up and drop off dates, times and locations will show if they are loaded against a booking. This information can be edited by selecting the booking, amending the pick up details within the pick up tab to the right of the screen and selecting edit details.

Select All/Unselect All

Select all bookings found, or un-select all bookings selected.

Totals

The system will keep a total of Assignments (selected), Services (used), and a Total pax count broken into number of Adults, Children and Infants within both the 'Assign' and 'Pick up' tabs to the bottom left of the screen.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings for a New Assignment, see "Resource Assignments" on page 256.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About the Assign Tab Fields

Group

Individual group numbers can be selected and assigned to different bookings, this allows for multiple assignments to be generated at one time.

Name

A name for the assignment. Duplicate descriptions can be used if required, user company's will decide on the naming convention required for assignment names.

Vehicle

Vehicles would have been defined in the Code Setup, and selectable options for this assignment/s will be available when using the dropdown.

Driver

Drivers would have been predefined in Code Setup, and selectable options for this assignment/s will be available when using the dropdown.

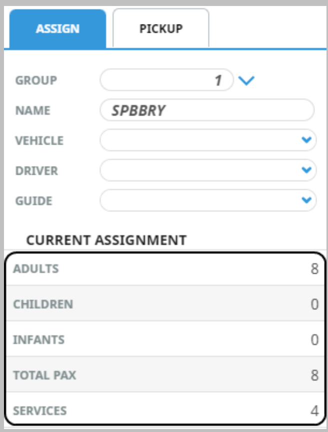
Guide

Guides would have been predefined in Code Setup, and selectable options for this assignment/s will be available when using the dropdown.

Current Assignment (Totals)

The system will provide totals per assignment 'group' number, providing the number of Services (selected), number of Adults, Children, Infants and Total Pax selected for this assignment.

In this example the screen capture is of the assignment tab on the right of the New Assignment screen. This assignment includes 4 Services, 8 Adults, 0 Children, 0 Infants, with a total pax count of 8 Adults.



Pick Up Tab

Provides information on the services that were selected in the results tab.

- Services can be viewed or un-selected from within the Services Tab.
- Service details such as pick up and drop off details or remarks fields can be edited.
- Edits to service details can be done for individual booking services or all bookings.

About Assignment Details

Assignment Tab

The left of the screen will show a list of groups if more than one group was selected when assigning resources. Users will work with one group at a time by selecting each group separately.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Name

The name given to the assignment, within the previous screen assign tab.

Assignment Status

Specific assignment status can be selected from a pre-defined list of statuses.

Start/End Dates

A specific date or a range of dates are available.

Adults, Children, Infants, Total Pax and Pax Allowed

This information is read only and displays from the totals in the previous screen. The information cannot be amended here.

Assignment Type

- **Single Task** - All services on the assignment are to be treated as a single task for the resource assigned to them. This means that any minimum/maximum number of passenger restrictions will be based on the total number of passengers in the service assignment.

- **Independent Services** - Each service in the assignment is to be operated independently. This type of assignment would be used where you are assigning resources on a daily/weekly basis and each service is a task in its own right.
- **Hop on- Hop off** - Multiple services are assigned that may or may not occur simultaneously so you have the situation where multiple services overlap.
- **Substitute Services** - This setting is most commonly used when the service costs are going to be joint and the costs of the service is to be shared across multiple bookings. If users decide to split the costs of the service over multiple bookings the service must be the same services and may require the original service to be substituted. This is discussed in more detail within "Substituting Services" on page 172 procedures.
- **Join Services** - Selection can occur to join the service and share the cost, more detail is discussed within the "Joining Services and Sharing Costs" on page 168 procedures.

Assignment Note

Free format note field can be used to insert specific assignment notes.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display with a check box (to un-select if necessary). It may be beneficial for organisations to select the vehicles, drivers and guides at this point and it will depend on the workflow used and fleet available when assigning your resources. Some operational procedures will allow earlier assignment within the 'Assign' tab and other tour operators may select to allocate the resources at this point.

Services Tab

NOTE: The left of the screen will show a list of groups if more than one group was selected when assigning resources. Users will work with one group at a time by selecting each group separately and a list of services attached to each group is available when using the services tab.

The arrow to the left can be used to view or edit pick up and drop off details per booking.

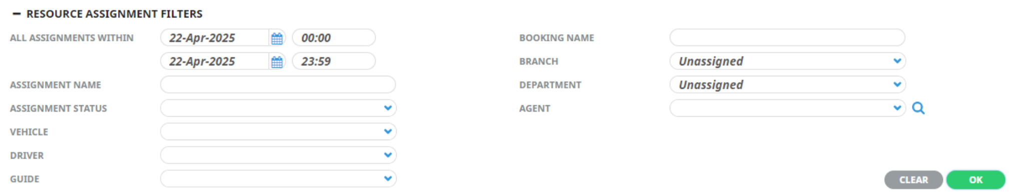
Editing an Assignment

Once bookings have been assigned to Resources the assignment at any time can be edited, additional services (or bookings) can be included, and pick up and drop off information can be updated if required.

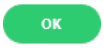
Edit an Assignment

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.

2. Expand the Resource Assignment Filters by clicking the + next to the Resource Assignment Filters. Select the required **filters** to narrow the results of the resources already assigned.



3. If you want to keep the changes, click **OK**.

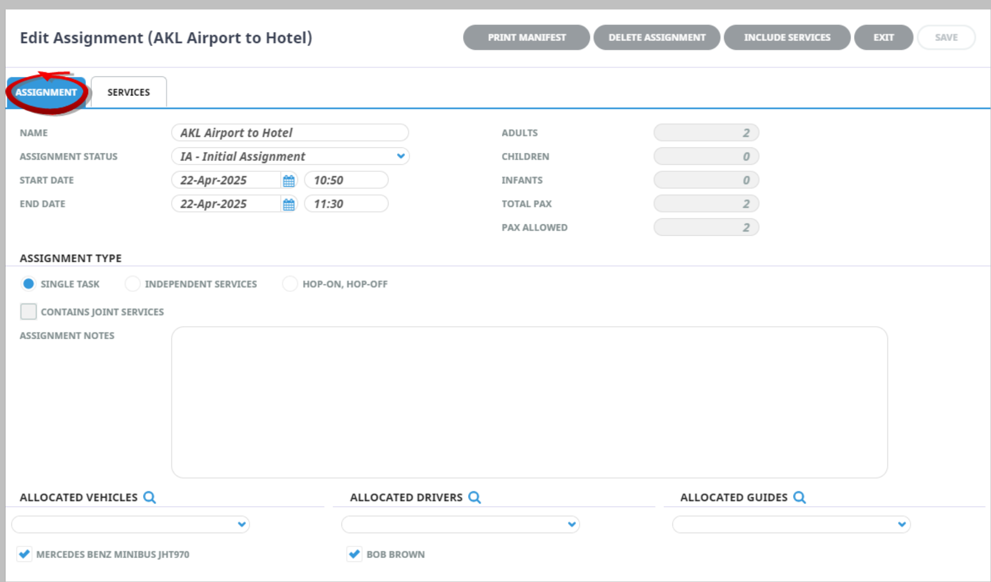


4. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the Resource Assignment line.

5. On the Edit Assignment screen **Assignment Tab**, edit the required fields.

> The most common amendment will be updating the Assignment Status, or adding Assignment Notes. There may be occasions where a vehicle or driver may need to be reassigned.

> The number of adults, children and infants showing as booked on this assignment cannot be altered as they are totalled from the services booked within the FIT or Groups Bookings.



6. Check the **completed screen**.

7. Click **Save** to keep the changes.

8. Click **Exit** to discard any changes.

Include Additional Booking (Services)

Follow the above procedure to procedure number 4.

5. On the Edit Assignment screen select **Include Services**.

   INCLUDE SERVICES

6. On the Include Services screen, select *Service Date From/To*, and select required filters to return results based on the filters entered.

   NOTE: The Service Tab will open, required filters can be selected from within the Booking Tab, Analysis Tab (Booking and Agent), Service, or Analysis Tab (Supplier and Product). Click on the links to find out more about the fields.

   The Service From /To dates will default to today's date, these can be changed depending on the required dates.

7. Click **Search**.
8. Select the bookings using the *Select* check boxes next to each booking or use *Select All*. Click on the link to find out more about the Results Tab fields.

9. Click **OK** to keep the changes and save or update the entry.

   a. Click **Exit** to discard any changes.
10. On the Edit Assignment Screen new services can be saved by selecting **Save**. The screen can be exited by selecting **Exit**, or further services can be included by selecting **Include Services**.

Adding Pick up and Drop off Details to an Assignment.

Follow the above procedure to procedure number 4.

5. On the Edit Assignment screen, select the Services Tab.
6. Highlight the booking (service) and insert the Pick Up and Drop Off details.

7. Select **Edit Service Details**.

   EDIT SERVICE DETAILS

8. Continue to edit the pick up and drop off details for the services within the assignment.

9. Click **Save** to keep the changes.

10. Click **Exit** to discard any changes.

> An alternative solution to updating pick up and drop off information for multiple bookings is to use the Update PickUp/Dropoff UI. **Booking Operations > Booking Operations > Update Pickup/Dropoff** or **Operations > Resource Assignment > Update Pickup/Dropoff**

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

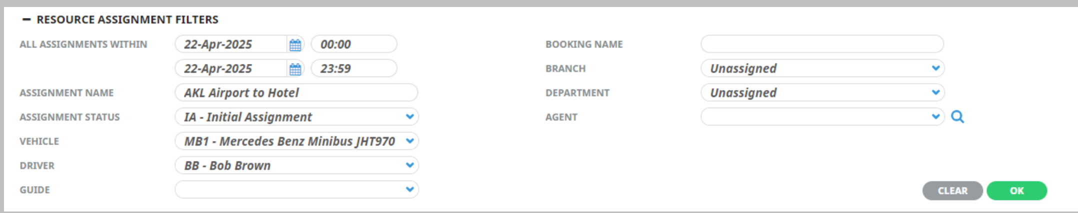
Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

NOTE: It is not necessary to define as many filters as we have in the example.



The more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

About Edit Assignment Fields

The Edit Assignment screen is split into two tabs, the **Assignment Tab** which displays the details of the current assignment, and the **Services Tab** which displays all service line details.

Assignment Tab

Name

The name given to the assignment within the previous screen assign tab.

Assignment Status

Specific assignment status can be selected from a pre-defined list of statuses.

Start/End Dates

A specific date or a range of dates are available.

Adults, Children, Infants, Total Pax and Pax Allowed

This information is read only and displays from the totals in the previous screen. The information cannot be amended here.

Assignment Type

- **Single Task** - All services on the assignment are to be treated as a single task for the resource assigned to them. This means that any minimum/maximum number of passenger restrictions will be based on the total number of passengers in the service assignment.
- **Independent Services** - Each service on the assignment is to be operated independently of each other. This type of assignment would be used where you are assigning resources on a daily/weekly basis and each service is a task in its own right.
- **Hop-on/Hop-off** - Multiple services are assigned that may or may not occur simultaneously so you have the situation where multiple services overlap.
- **Contains Joint Services** - This radio button is read only and displays that the assignment contains joint services that share costs, more detail is discussed within the "Joining Services and Sharing Costs" on page 168 procedures.

Assignment Notes

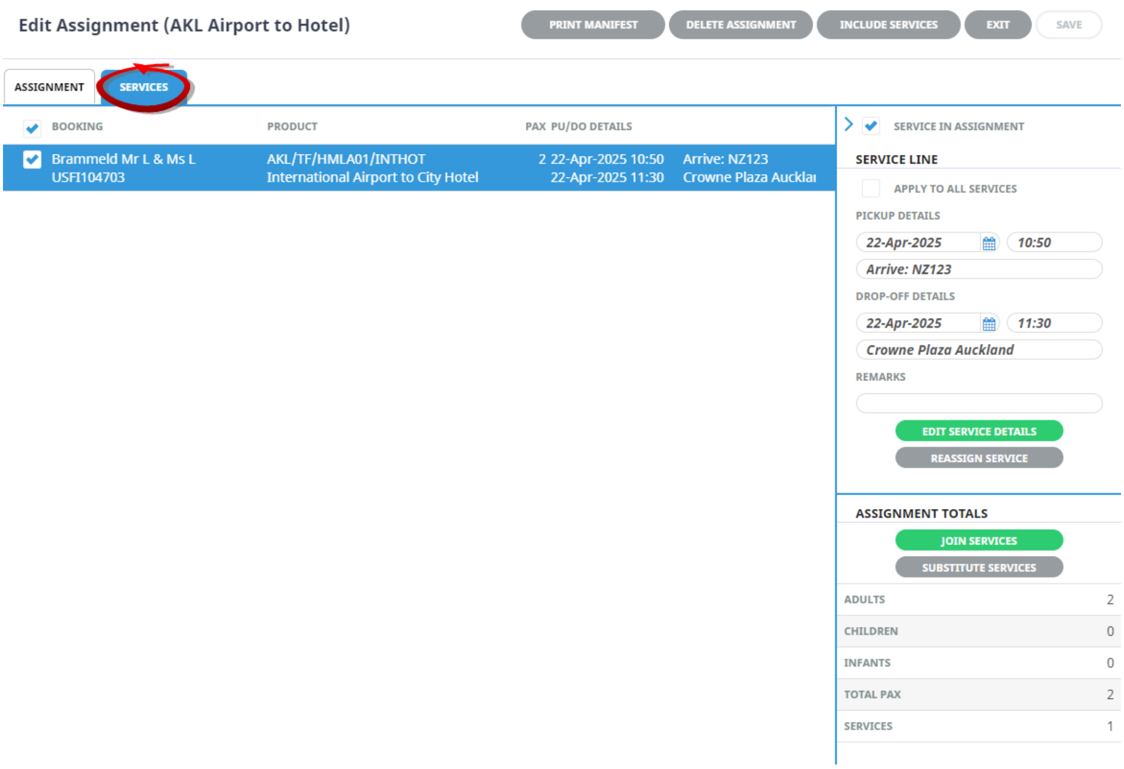
Free format note field can be used to insert specific assignment notes.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here and any pre-selected resources will display with a check box (to un-select if necessary).

Service Tab

NOTE: The left of the screen will show a list of groups if more than one group was selected when assigning resources. Users will work with one group at a time by selecting each group separately and a list of services attached to each group is available when using the services tab.



Bookings

A list of bookings will appear for the services that have been selected for this assignment.

Product

Shows the service that has been selected.

Pick Up/Drop Off Details

The column within the booking list provides information that has been inserted into the booking for clients pick up and drop off information. This information can be amended by highlighting a booking in the booking list. When a booking/service is highlighted the pick up and drop off date, location, time and remarks fields will enable (to the right of the screen in the Service Line section). Allowing users to amend the information individually for each booking, or apply the amendment to all services.

Assignment Totals Section

Total pax numbers are provided per assignment, showing the number of services, adults, children and infants included in the assignment.

Join/Unjoin Services

The option to join or unjoin the services is available in the services tab. Information on joining and un-joining services is provided in the Joining Services and Sharing Costs procedure.

Substitute Services

The option of substitute the services is available in the service tab and information on substitution of services is provided in the Substitute Service procedure.

Deleting an Assignment

There may be occasions where assignments need to be deleted. Deletion of assignments can occur within the edit assignment screen. Once the assignment is deleted the system does not store deleted assignments for editing at a later date the assignment will be deleted from the system.

Delete an Assignment

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

   If you want to keep the changes, click **OK**.

   OK

3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the **Resource Assignment line**.

START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS	DRIVER	VEHICLE	GUIDE
22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	IA	2	1	BB	MB1	

4. On the **Edit Assignment** screen, click **Delete Assignment.**

   DELETE ASSIGNMENT

5. To keep the changes, click **Yes**.

   YES

6. If you do not want to delete the assignment, click **No**.

   NO

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

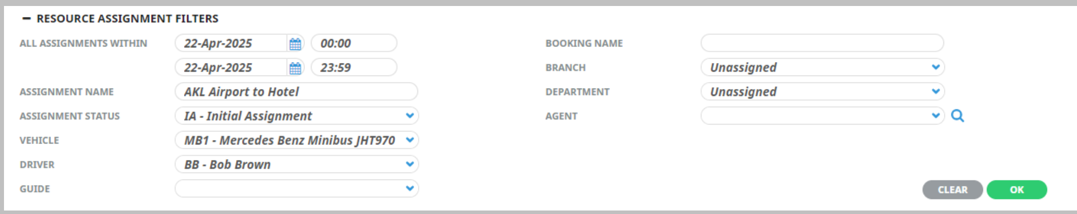
Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

NOTE: It is not necessary to define as many filters as we have in the example.



The more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assingnment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

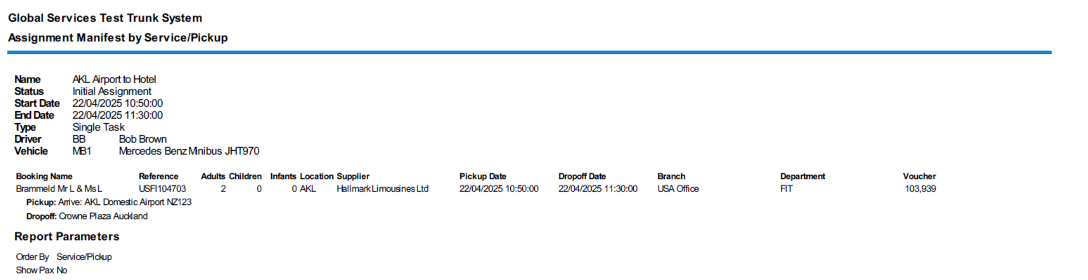
Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Print Manifest

A passenger manifest can be printed from within the assignment and will generate in a document such as the example below.



Global Services Test Trunk System
Assignment Manifest by Service/Pickup

Name AKL Airport to Hotel
Status Initial Assignment
Start Date 22/04/2025 10:50:00
End Date 22/04/2025 11:30:00
Type Single Task
Driver BB Bob Brown
Vehicle MB1 Mercedes Benz Mnibus JHT970

Booking Name	Reference	Adults	Children	Infants	Location	Supplier	Pickup Date	Dropoff Date	Branch	Department	Voucher
Brammeld Mr L & Ms L	USFI104703	2	0	0	AKL	Hallmark Limousines Ltd	22/04/2025 10:50:00	22/04/2025 11:30:00	USA Office	FIT	103,939

Pickup: Arrive: AKL Domestic Airport NZ123
Dropoff: Crowne Plaza Auckland

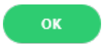
Report Parameters

Order By Service/Pickup
Show Pax No

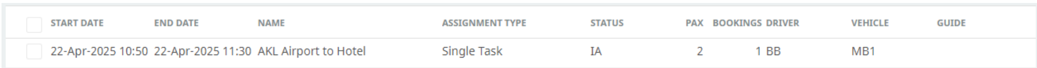
Print a Manifest

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment.**
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

   If you want to keep the changes, click **OK**.

3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the **Resource Assignment line**.

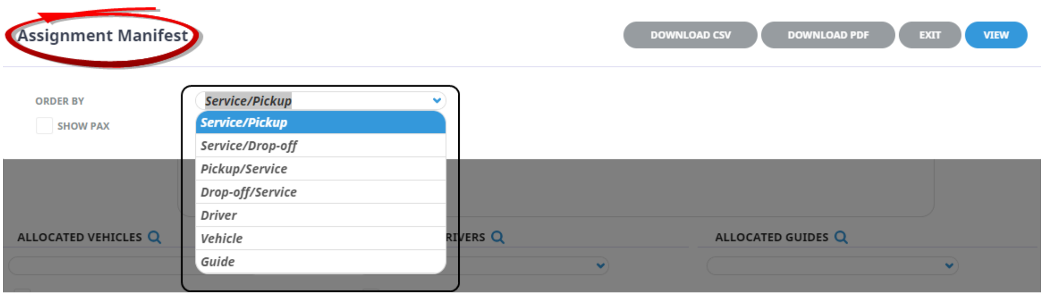
   

START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS	DRIVER	VEHICLE	GUIDE
22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	IA	2	1	BB	MB1	

4. On the **Edit Assignment** screen, click **Print Manifest**.

5. On the Assignment Manifest screen, select **Order By** from the drop down selection.

6. If you want to download the assignment manifest to a PDF document, click **Download PDF**.

7. If you want to download the assignment manifest to a CSV file, click **Download CSV**.

8. If you want to view the assignment manifest, click **View** The manifest can be viewed and printed if required.

9. If you do not want to view or download the assignment Manifest click **Exit**.

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking name

Individual clients can be found by using the booking name filter.

Branch/Department

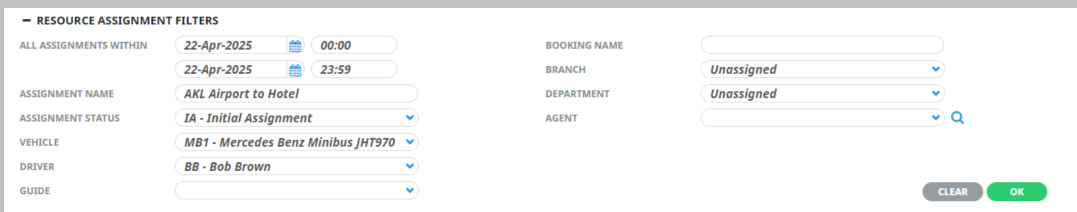
Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

It is not necessary to define as many filters as we have in the example.



Fields with drop down selections will allow users to select from pre defined data, if the name is known or partially known users can begin to type the required text and use the drop down selection. Searching for data will then be refined to the text typed within these fields.

About Result Columns

Start Date/End Date

Assingnment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Printing Manifests by Assignment Category

With this feature enabled manifest reports can be produced per category providing a list of passenger arrival and departure information for each assignment. An additional filter field for Assignment Category will provide category specific results.

Assignment Manifest Screen

Assignment Manifests can be downloaded by selecting:

- Download CSV or,
- Download PDF.

Order By

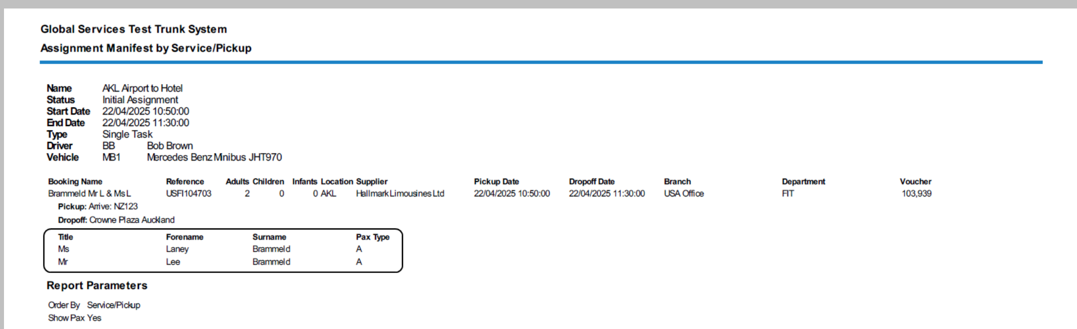
There is flexibility to how the manifest can display information and selection to output the order can be by:

- Service/Pickup.
- Service/Drop-off.
- Pickup/Service.
- Drop-off/Service.
- Driver.
- Vehicle.
- Guide.

Show Pax Check-Box

Users can also select to print individual passenger information by selecting the 'Show Pax' check box. Passengers full name (Title, Forename and Surname) will be included as well as the Passenger Type (Adult A or Child C) will show in the Pax Type column.

PDF Example - using Show Pax:



Global Services Test Trunk System

Assignment Manifest by Service/Pickup

Name	AKL Airport to Hotel	
Status	Initial Assignment	
Start Date	22/04/2025 10:50:00	
End Date	22/04/2025 11:30:00	
Type	Single Task	
Driver	BB	Bob Brown
Vehicle	MB1	Mercedes Benz Mnibus JHT970

Booking Name	Reference	Adults	Children	Infants	Location	Supplier	Pickup Date	Dropoff Date	Branch	Department	Voucher
Brammeld Mr L & Ms L	USFI104703	2	0	0	AKL	Hallmark Limousines Ltd	22/04/2025 10:50:00	22/04/2025 11:30:00	USA Office	FIT	103,939

Pickup: Arrive: NZ123

Dropoff: Crowne Plaza Auckland

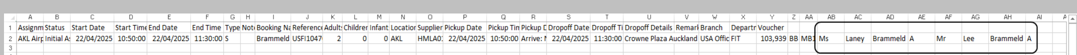
Title	Forename	Surname	Pax Type
Ms	Laney	Brammeld	A
Mr	Lee	Brammeld	A

Report Parameters

Order By Service/Pickup

Show Pax Yes

CSV Example - using Show Pax:



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI
1	Assignm	Status	Start Date	Start Time	End Date	End Time	Type	Not	Booking Na	Reference	Adults	Children	Infant	Location	Supplier	Pickup Date	Pickup Tin	Pickup D	Dropoff Date	Dropoff Ti	Dropoff Details	Remark	Branch	Departr	Voucher										
2	AKL Airp	Initial A	22/04/2025	10:50:00	22/04/2025	11:30:00	S		Brammeld	USFI1047	2	0	0	AKL	HMLA01	22/04/2025	10:50:00	Arrive: N	22/04/2025	11:30:00	Crowne Plaza Auckland		USA Offic	FIT	103,939	BB	MB1	Ms	Laney	Brammeld	A	Mr	Lee	Brammeld	A
3																																			

Bulk Update

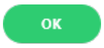
There may be situations that you will need to do a bulk update of Assignment details, this could be a bulk update of assignment status for example.

Multiple Assignments can be selected, and updated in bulk. The procedure below describes how to update multiple assignments in bulk.

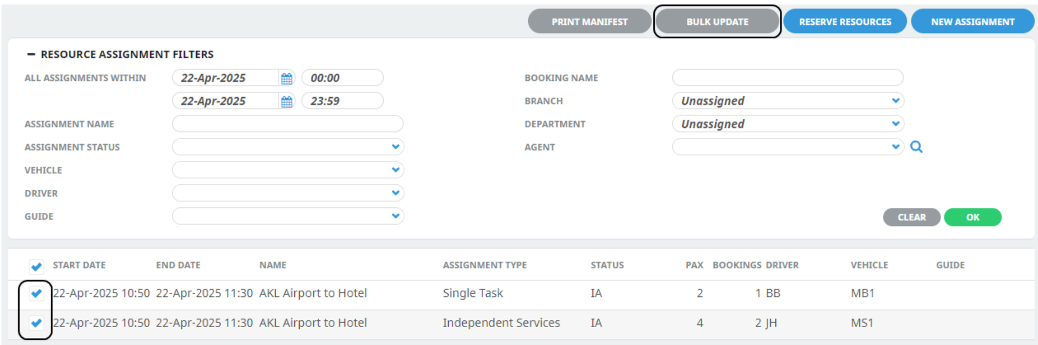
Bulk Update of Assignments

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment.**
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

   If you want to keep the changes, click **OK**.

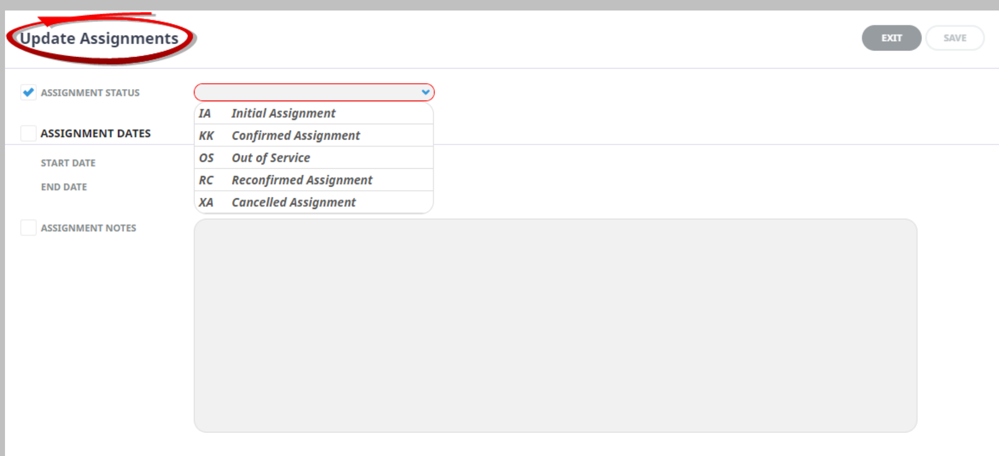
   

3. A list of existing Resource Assignments results will be returned, selection can be made by checking the Resource Assignment lines and clicking, **Bulk Update**.

4. On the **Update Assignment** check the required fields that are to be updated.
   NOTE: Fields that can be updated are *Assignment Status*, *Assignment Dates*, *Assignment Notes*, checking the box next to the field will enable entry into the fields and allow updates to be made.

> The most common amendment will be updating the Assignment Status, or adding Assignment Notes.

> In this example we have selected the Assignment Status check-box, we will update the status of these assignments to a Confirmed Assignment Status. The Assignment Dates and Assignment Notes will remain greyed out as we have not selected to update these fields.
>
> 
>

5. Check the **completed screen**.

6. Click **Save** to keep the changes.

7. Click **Exit** to discard any changes.

8. If **save** was selected a summary of the number of successful operations updated will show, click **OK**.

9. The **Resource Assignment** screen will re-open.

In our example the Status of the assignments has been updated to KK.

	START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS	DRIVER	VEHICLE	GUIDE
	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	KK	2	1	BB	MB1	
	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Independent Services	KK	4	2	JH	MS1	

10. Continue updating Resource Assignments by clearing and re-entering filter requirements from procedure 3. Or if Bulk Update of Resource Assignments is no longer required. Exit the module.

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

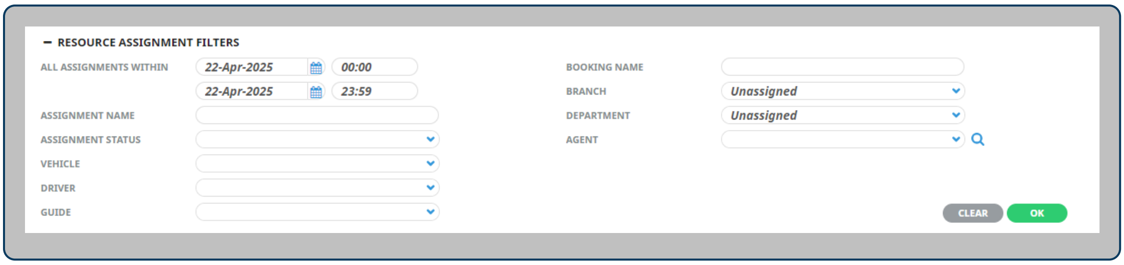
Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date. This will produce results for all assignments (inclusive) within the dates defined.



About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

About Update Assignment Fields

Assignment Status

The selections available here have been pre-defined in Code Setup, this field shows the statuses of the assignment.

Start Date/End Date

The dates defined here will change the start date or end date of the assignments selected.

Assignment Notes

Note text can be entered and updated in bulk across multiple assignments.

Joining Services and Sharing Costs

Services across multiple bookings can share the costs associated with the services, you can select to join the services in the assignment. This can be done either when creating the assignment or at a later date when the assignment is edited.

The sharing of costs applies to non accommodation services only, and the services being joined must be for the same product. There is an option within the assignment selection where if the same product was not originally booked within an FIT or Group Booking the assignment will allow for the product to be substituted as the products need to be the same for the joint service function to operate. Instruction on substituted services is available.

When the services are joined within an assignment the services within the FIT or Group bookings are re-costed on the total cost of the pax on all services. The value is then prorated across all of the service lines across all bookings.

In this example we have a service that has a total value of $250.00 the cost of this service is split between each booking. There is a total of 11 passengers using this transfer, the cost is $22.72 per person and the system will automatically apply 2/11ths for Booking 1, 3/11ths for Booking 2, 2/11ths for Booking 3 and 4/11ths for Booking 4.

Transfer Total = 11 Passengers	Across 4 Bookings	Joint Service Value for each Booking
$250 per Transfer	Booking 1	$22.72 per Person = $45.45
	Booking 2	$22.72 per Person = $68.18
	Booking 3	$22.72 per Person = $45.45
	Booking 4	$22.72 per Person = $90.90

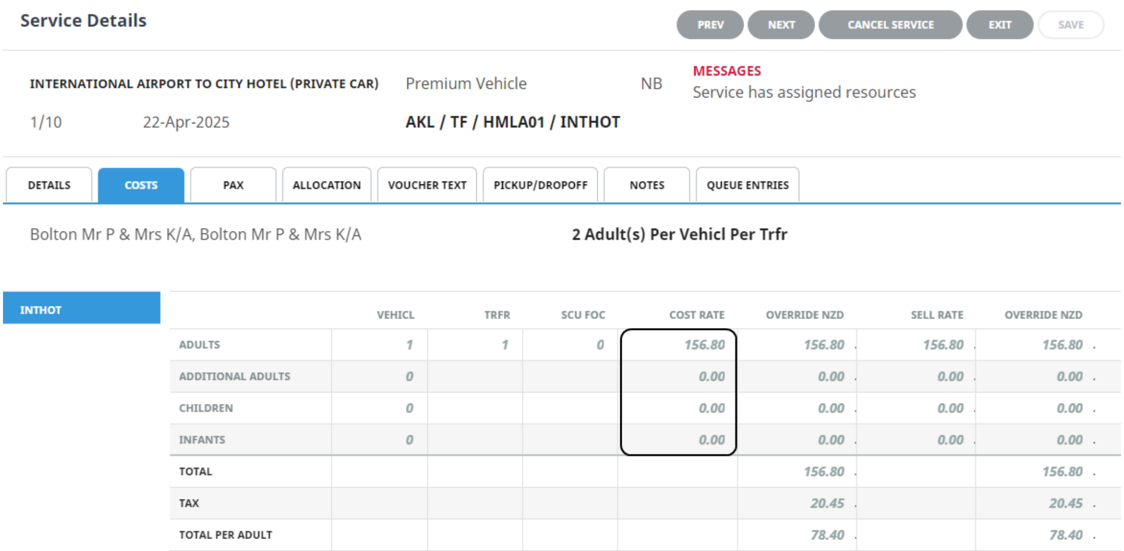
Services can be joined or un-joined within the assignment, the system will automatically apply the new service value within the FIT or Groups Booking and will also update the booking summary to reflect the changes.

The bookings are automatically updated within the costs screen with a shaded overridden value. Indicating that the cost of the service does not match the product cost because the bookings have been joined, and are now sharing the costs.

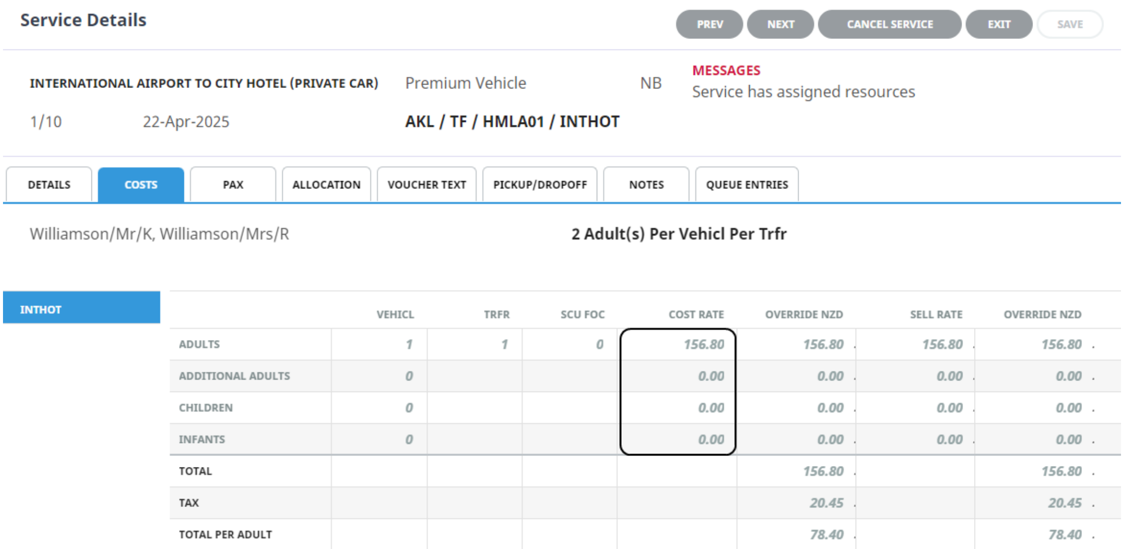
Before Services are Joined

In the example below you will see two bookings, one for Mr and Mrs Bolton and the other for Mr and Mrs Williamson. The first screen captures show the service costs before the service was joined.

Booking 1 - Pre-joined Service



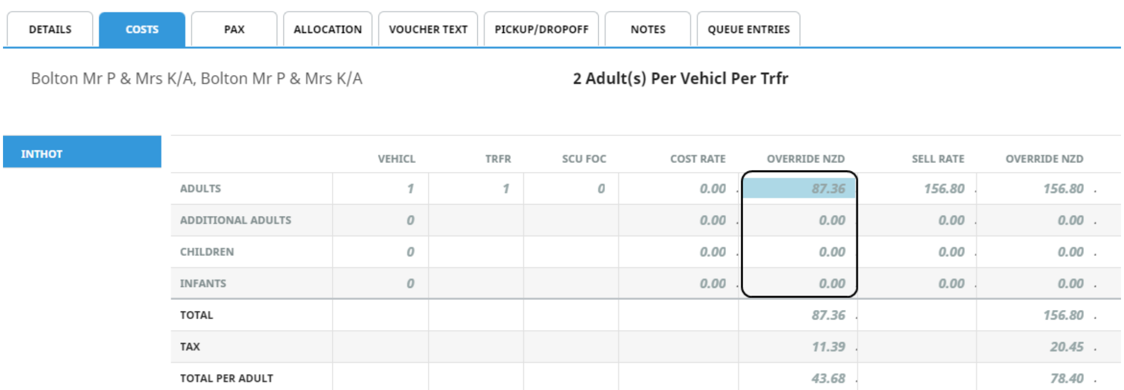
Booking 2 Pre-joined Service



After Services are Joined

You can see in the example below after the join service has been applied the costs have now been shared across the two bookings and the services have automatically updated. A message will display within the bookings service costs screen to say that the service has an assigned resource.

Booking 1 - Post-joined Service



Booking 2 - Post-joined Service

DETAILS | COSTS | PAX | ALLOCATION | VOUCHER TEXT | PICKUP/DROPOFF | NOTES | QUEUE ENTRIES

Williamson/Mr/K, Williamson/Mrs/R

2 Adult(s) Per Vehicl Per Trfr

INTHOT

	VEHICL	TRFR	SCU FOC	COST RATE	OVERRIDE NZD	SELL RATE	OVERRIDE NZD
ADULTS	1	1	0	0.00	87.36	156.80	156.80
ADDITIONAL ADULTS	0			0.00	0.00	0.00	0.00
CHILDREN	0			0.00	0.00	0.00	0.00
INFANTS	0			0.00	0.00	0.00	0.00
TOTAL					87.36		156.80
TAX					11.39		20.45
TOTAL PER ADULT					43.68		78.40

The procedure below will help you to join services for existing assignments. If the assignment has not yet been created, follow the New Assignment procedure to create the assignment.

Join Services

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. Expand the Resource Assignment Filters by clicking the +. Select the required filters to narrow the results for resources that have already been assigned.

   If you want to keep the changes, click **OK**.

   OK
3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the Resource Assignment line.
4. On the **Edit Assignment** screen select the **Service Tab** and use the check boxes to select the required service options to join.
5. Click **Join Services**.

   JOIN SERVICES
6. Confirm the linking of joined services.
7. To keep the changes, click **Yes**.

   YES
8. To discard any changes, click **No**.

   NO

Unjoin Services

Services within the assignment can be un-joined if the joined services are no longer required, when services are un-joined the services within each booking will return to the product cost price stored in the system and the booking summary will also be updated.

To un-join the services follow the above procedure, when you get to Step 5, click **Unjoin Services**.

UNJOIN SERVICES

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment statuses can be selected from a pre-defined list providing results based on an assignment status.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here and any pre-selected resources will display. Results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

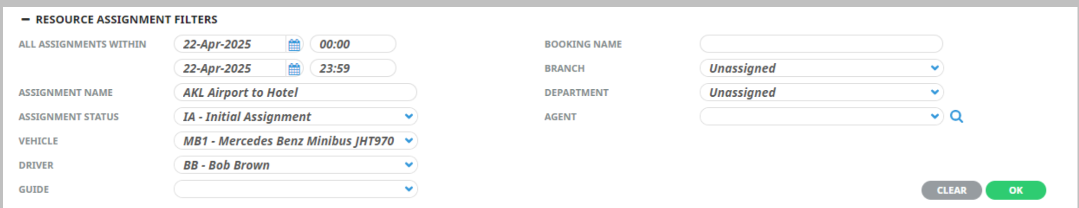
Bookings with specific booking branch or booking department can be found when filtering by branch or department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

It is not necessary to define as many filters as we have in the example.



However, the more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assingnment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

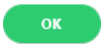
Substituting Services

Services can be substituted allowing for a service in a booking to be substituted for another services. This can occur within a booking, or within an assignment. The same result is achieved if the service was deleted in a booking and another service inserted in its place.

Substitute Services

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment.**
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

   If you want to keep the changes, click **OK**.

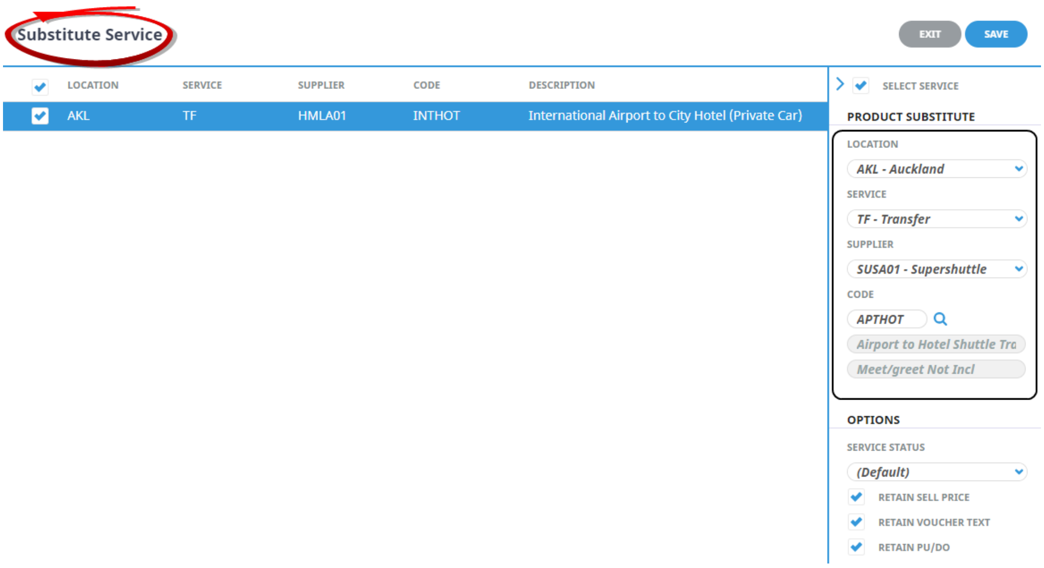
   

3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the Resource Assignment line.
4. On the **Edit Assignment** screen select the **Services Tab**, highlight the booking and click **Substitute Services**.

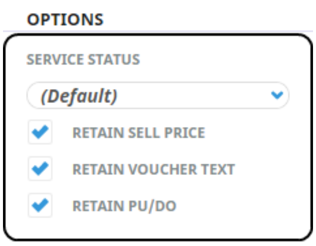
   

5. The **Product Substitute** service screen will open, select the service using the check box next to the required service, and select a new substitute product *Location, Service*, *Supplier*, and (Product) *Code*.

   NOTE: The product description and comment field (if used) will populate in the grey fields below the code field if the product exists.

6. Keeping with the **Substitute Services** screen, select a *Service Status*, and use the check boxes to select the required options if you want the substitute service to; *Retain (the original) Sell Price*, *Retain (the original) Voucher Text*, or *Retain (the original) Pick up/Drop off* details.

7. Check the **completed screen**.

8. Click **Save** to keep the changes.

9. Click **Exit** to discard any changes.

10. If **Save** was selected a Summary of Substitute Services will display with the Number of Successful Operations, click **OK** to clear the screen.

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: **Assignment Category** - This field is enabled if organisations are using multiple categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

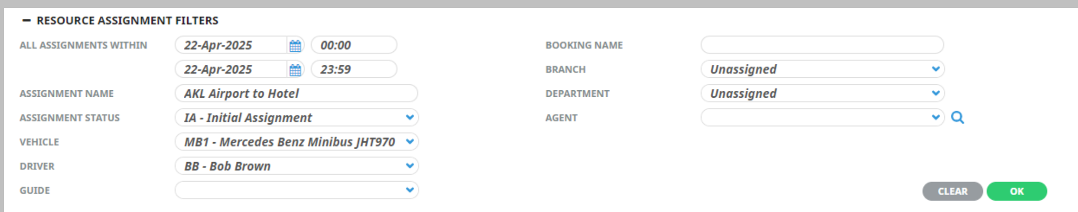
Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

It is not necessary to define as many filters as we have in the example.



The more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Update Pickup & Dropoff

Bulk updates to pick up and drop off times for services can be achieved when using the Booking Operations function Update Pickup and Drop off. Some organisations may need the facility to locate or update a number of services at once.

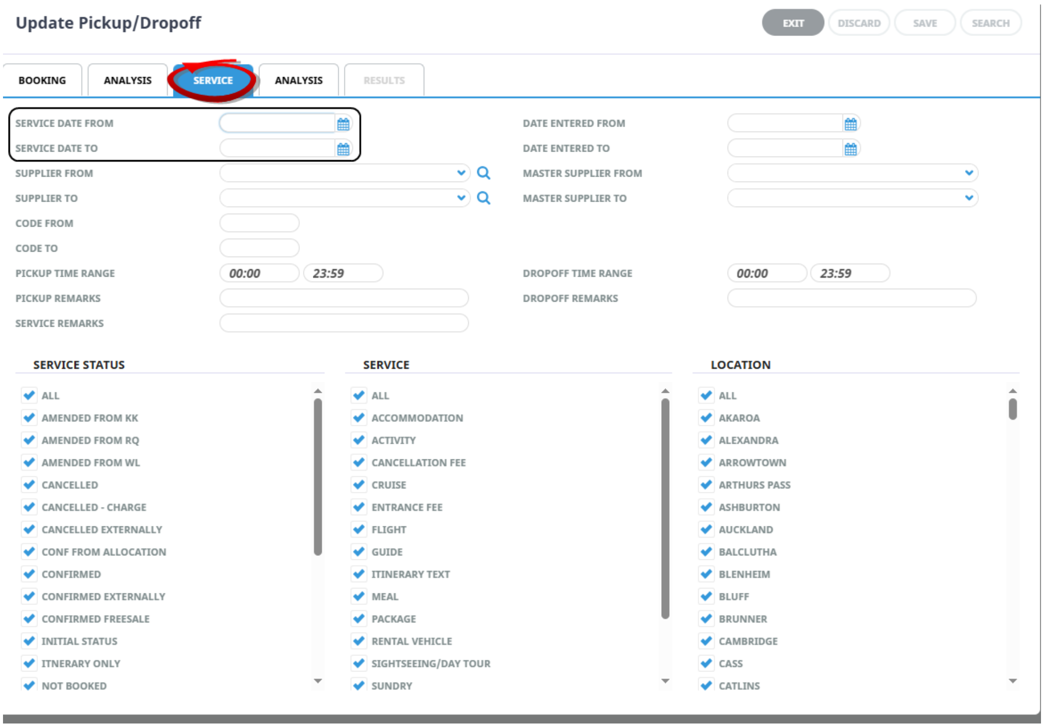
The Update Pick up/Drop off menu option allows users to set filter options to return required results, and amendment to pick up/drop off points or times can be performed to multiple services across multiple bookings.

Updating Pick Up & Drop Off Details

1. From the Home menu, select **Home > Operations > Service Operations > Update Pickup and Dropoff**.

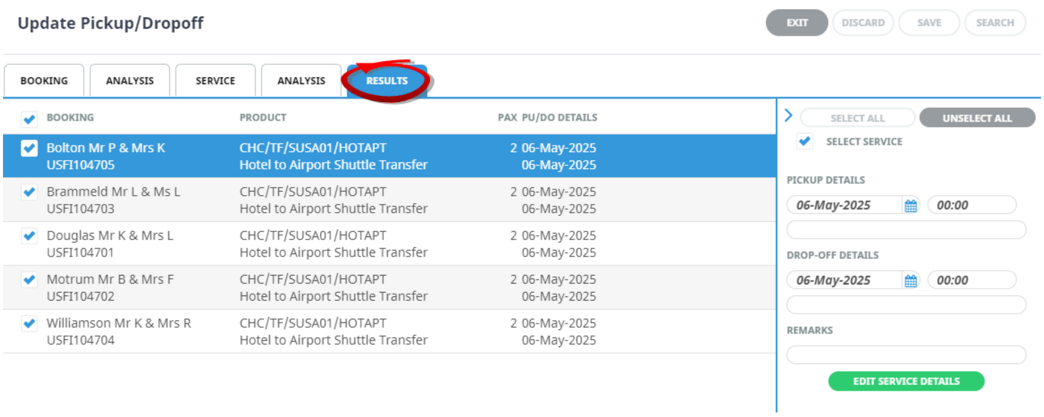
2. On the blank **Update Pickup/Dropoff** screen, the **Service Tab** will open, select fields to narrow the search filter results.

   NOTE: '**Save**' will enable when the **Service From/To** fields have dates selected. Further filter selections are available from the following tabs *Booking Tab*, *Analysis Tab* (Booking), *Service Tab* and *Analysis Tab* (Service).

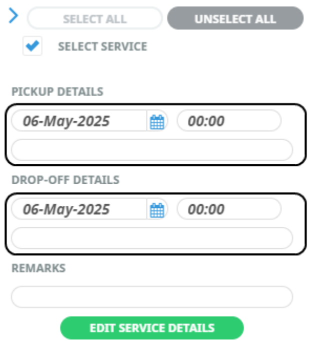
   

3. Check the **completed screens**.

4. Click on the **Results Tab**. Select the services to update. There are three ways to select:
   a. Using the **check-box**.
   b. Or clicking on the **Booking Service**.
   c. If all services are to be updated, use **Select All** for bulk selection.



5. Update the **Pick Up/Drop Off** details on the right of the screen.



6. Or click **Edit Service Details**, to enter the Pickup and Drop off details.

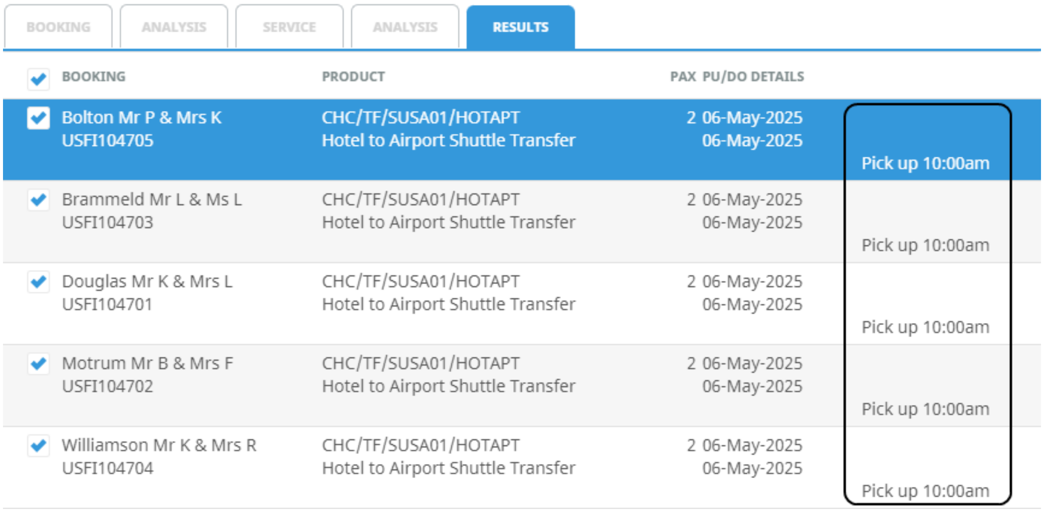
   a. Click **OK** to keep the changes and save or update the entry.

7. Click **Save** to keep the changes.

8. Click **Exit** to discard any changes.
9. If **Save** was selected a Summary will appear with the number of successful bookings to be updated.

10. Click **OK** to exit the modal.

11. The **Update Pick Up and Drop Off** Results tab will re-display, the service details will have updated and can be viewed from here.



About Update Pick Up/Drop Off Fields

Service Tab

Service Date From/To

NOTE: Mandatory field selection to trigger the Save button activation.

This is the date of the service within a booking. Selection for a range of dates is entered here Pick Up and Drop off details for services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Pick up and Drop off details with a specific, or range of, supplier(s) codes matching the selection.

Code From/To

This is the service code or range of service codes.

Pick up Time Range

Used to select a range of pick up times for services that fall within the time range provided.

Pick up Remarks

Used to select specific pick up points selected in the booking.

Service Remarks

This selection can be used to filter by specific remarks stored within the service.

Date Entered From/To

This is the date the booking was entered. If selection for a range of dates is entered here Pick up and Drop off details for bookings that were created within the date range provided will be display in the results screen.

Master Supplier From/To

Used to select Master Suppliers with a specific, or range of, Master Supplier code(s) matching the selection.

Drop off Time Range

Used to select a range of drop off times for services that fall within the time period provided.

Drop off Remarks

Used to select specific drop off points selected within the booking.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked and Queue Messages for those service types that have been selected will return results.

Location

Multi select checkboxes display results for services in the booking matching the location/s selected - by default all Locations are selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

Booking Tab

Travel Date From/To

Travel date for bookings is the date that appears in the header of a booking this is generally the date of the first service. This date range field is used to select bookings with a specific date, or Pick up and Drop off details for bookings that fall within a range of travel dates.

Booking Name

This is the name of the booking that appears in the header of a booking.

Booking Ref From/To

Used to select a specific booking reference or range of references.

Agent From/To

Used to select Pick up and Drop off Details with a specific, or range of, agent(s) codes in the booking header matching the selection.

Consultant

Selecting this field will filter bookings by the consultant code attached to the booking.

Last Service Date From/To

Used to filter by the date of the last service or range of dates.

Date Entered From/To

This is the date the booking was entered. If selection for a range of dates is entered here Pick up and Drop off details for bookings that were created within the date range provided will be display in the results screen.

Booking Type

Used to filter by booking type, FITs, Groups or All booking types.

Master Agent From/To

Used to select Pick up and Drop off details with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

Currency

Used to select bookings with a particular booking currency.

Booking Status

By default, all booking statuses are checked and services in bookings that have those status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and services in bookings that have those branches will be selected.

Department

By default all departments are checked, services in bookings that have those branches will be selected.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes.

Service Analysis

The bottom two rows of this tab are the 6 Product (Service) Analysis codes. These are Product Analysis codes attached to the Service.

Analysis fields can be expanded or minimised by using the + or - function.

Service Status Update

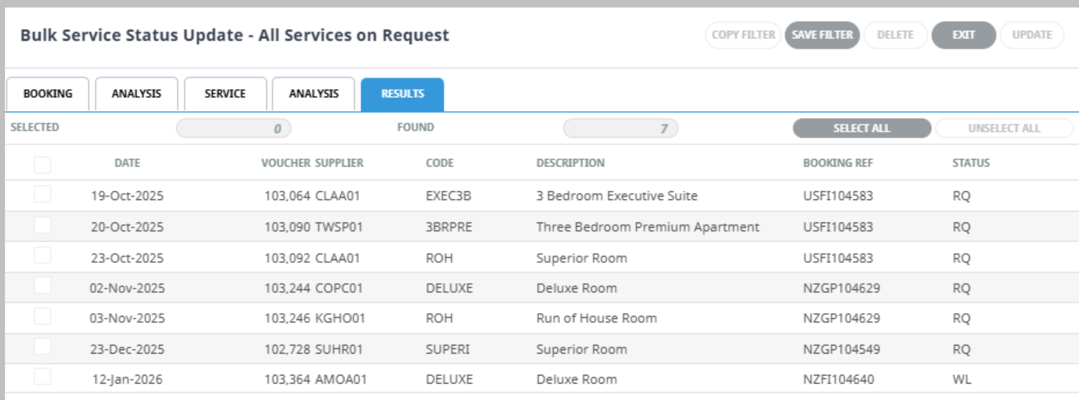
Bulk Service Status Update allows Statuses to be updated in a bulk process, across multiple bookings concurrently.

NOTE: This Bulk Service Status Updates feature is designed for companies that manage a high volume of bookings and require a streamlined way to update service statuses in large batches. Instead of updating each booking individually, this function allows users or dedicated teams to apply status changes across multiple bookings at once — ideal for larger organizations with centralized operations or end-of-day processing routines. Please note that this feature may not be suitable for all businesses, particularly those managing bookings on a case-by-case basis.

The selection criteria of bulk update setting can be saved and recalled. If saved, a list will display when the Service Status Update menu is selected. Frequently used filters can be copied and saved from within the Bulk Service Status Update screen.

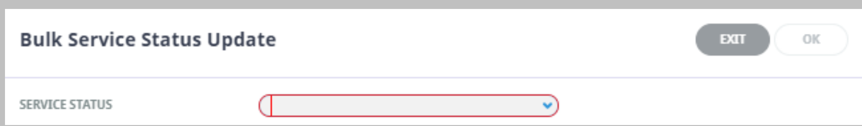
For example, with this Service status update we want to filter for a selection of bookings that have a Service Status of 'RQ' On Request, and Wait Listed of 'WL', for accommodation Service Types. The system has filtered the bookings that meet the requirements of Service Status and Service Type. Now individual selection of services or select all can be chosen.

NOTE: The Service Status used in this example may differ from your company's Service Status and booking codes.



DATE	VOUCHER SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS
19-Oct-2025	103,064 CLAA01	EXEC3B	3 Bedroom Executive Suite	USFI104583	RQ
20-Oct-2025	103,090 TWSP01	3BRPRE	Three Bedroom Premium Apartment	USFI104583	RQ
23-Oct-2025	103,092 CLAA01	ROH	Superior Room	USFI104583	RQ
02-Nov-2025	103,244 COPC01	DELUXE	Deluxe Room	NZGP104629	RQ
03-Nov-2025	103,246 KGHO01	ROH	Run of House Room	NZGP104629	RQ
23-Dec-2025	102,728 SUHR01	SUPERI	Superior Room	NZGP104549	RQ
12-Jan-2026	103,364 AMOA01	DELUXE	Deluxe Room	NZFI104640	WL

After the user selects the services to be updated, a bulk service status update is performed, changing the status of all selected services at once.



Create Bulk Service Status Update

1. From the Home menu, select **Home > Operations > Service Operations > Bulk Service Status Update.**
2. Click **Manual.**

3. On the blank Bulk Supplier Messaging - Manual Selection screen, the **Service Tab** will open, select the required filters from the field selections available within the **Booking Tab**, **Analysis Tab (Booking and Agent)**, **Service Tab** and the **Analysis Tab (Supplier and Product)**.

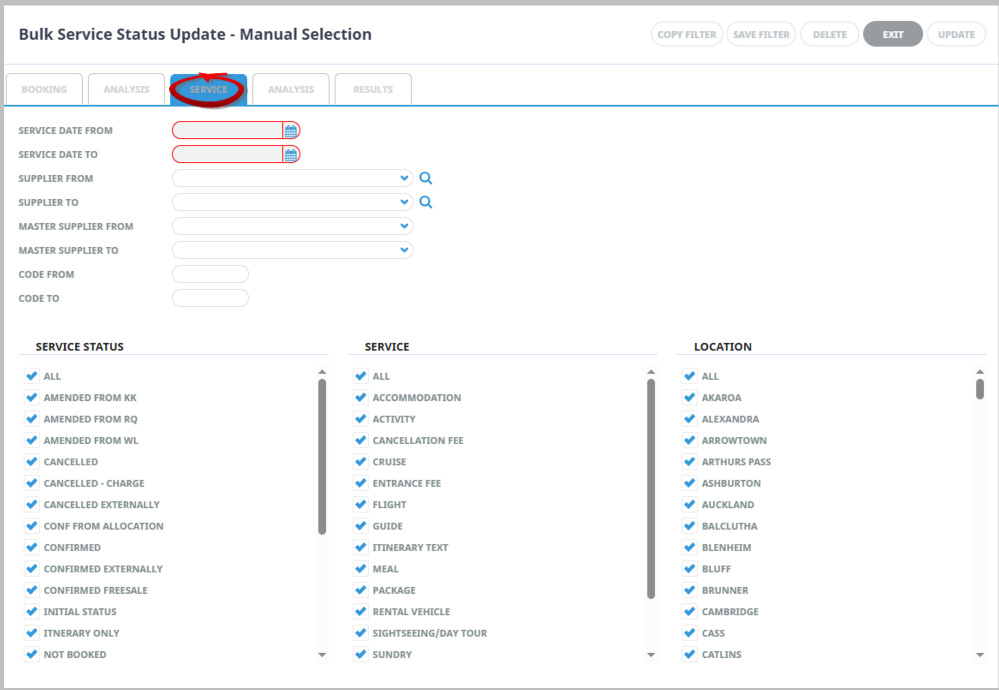
   View Service Status Update Filter Selections to learn more about all the field selections available, or view the individual tab filters: Booking Tab, Analysis (Booking and Agent), Service, Analysis (Supplier and Product), Results.

   NOTE: There are two tabs with the heading Analysis, the Analysis Tab on the left refers to the Booking or Agent Analysis field selections, whereas the Analysis Tab on the right refers to Supplier and Service Analysis field selections.

4. Check the **completed screens.**

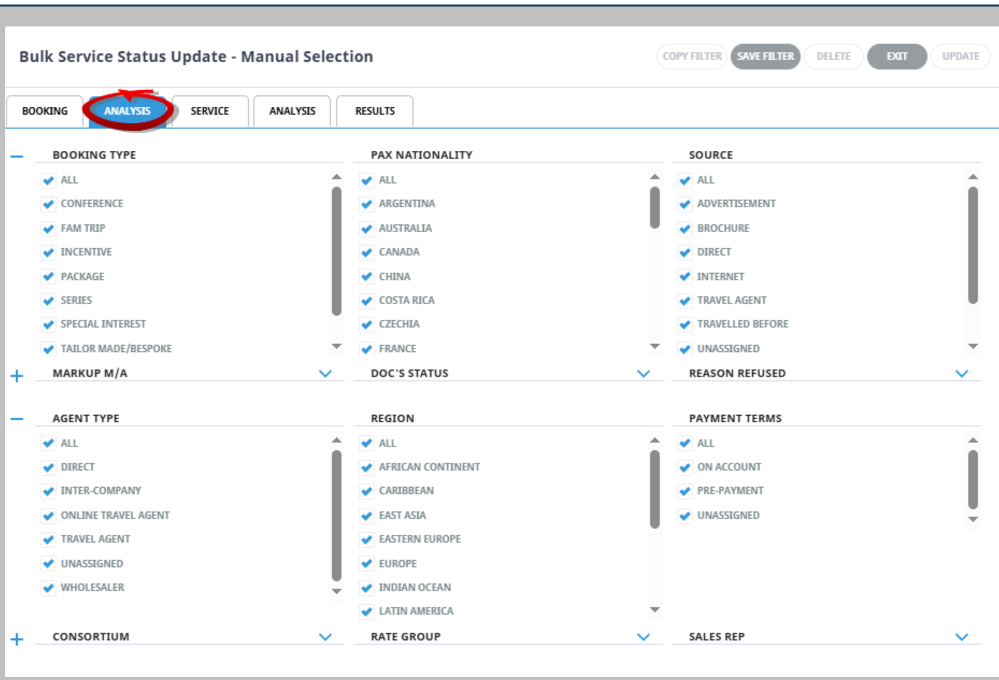
Service Tab

Entering dates into the 'Service Date To' and 'Service Date From' fields will activate the buttons and the other Tabs to narrow the filtered results.

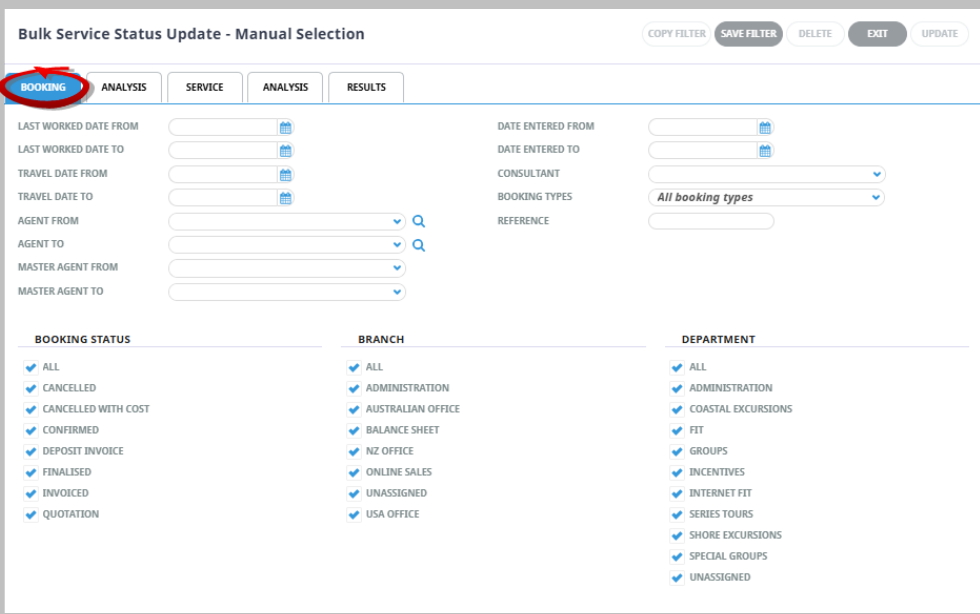


Analysis Tab (Booking and Agent Analysis)

In this example the 3 Booking Analysis fields have been expanded using +. and 3 Agent Analysis fields. Whereas the remaining Booking Analysis fields and Agent Analysis fields have been left minimised. Your company's Analysis Fields and codes will be different to those shown in this User Manual and will reflect your organisations analysis requirements.

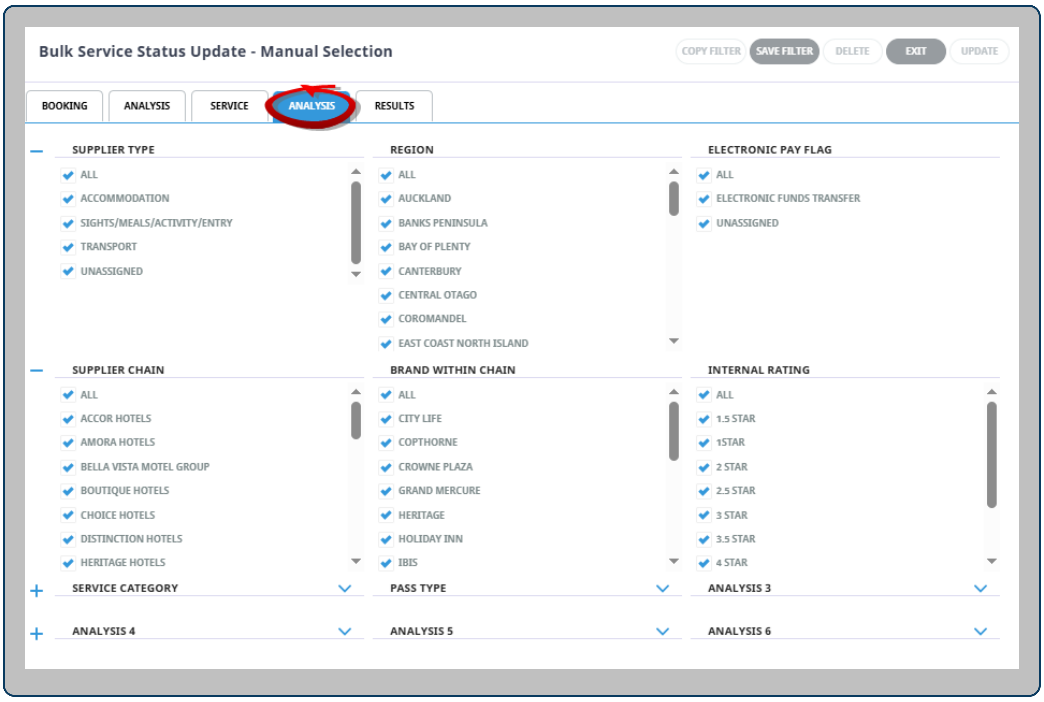


Booking Tab

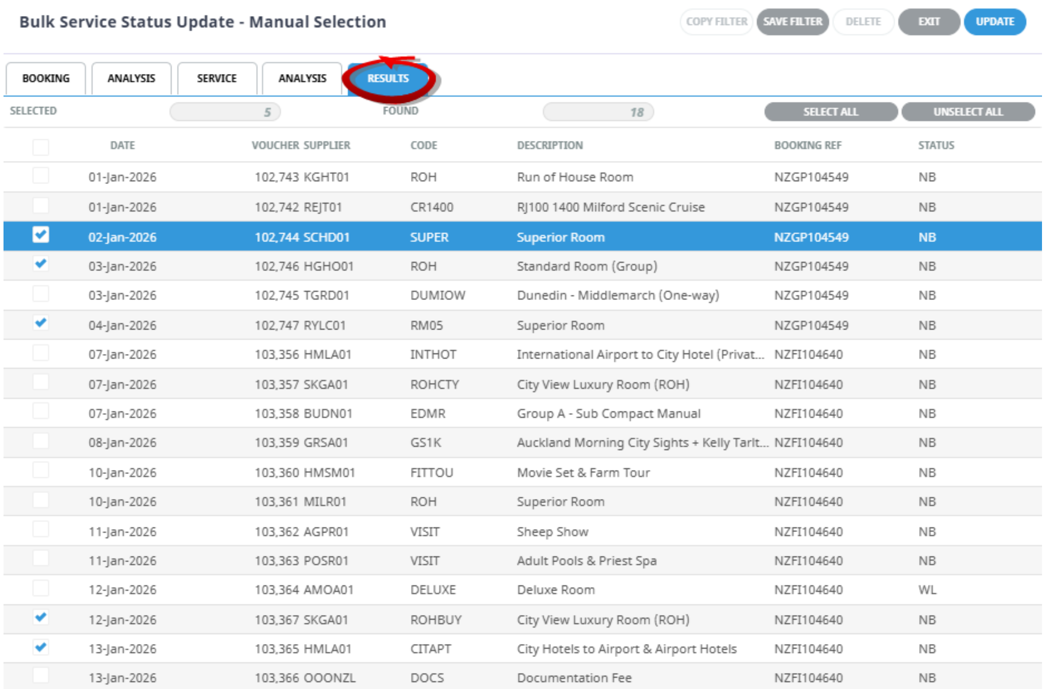


Analysis Tab (Supplier and Service Analysis)

In this example the Supplier Analysis fields have been expanded using +. Where as the Product Analysis fields have been left minimised. Your company's Analysis Fields and codes will be different to those shown in this User Manual and will reflect your organisations analysis requirements.



5. Click on the **Results Tab**. Select the services using the **Selected check boxes** next to each service, or use **Select All**.



6. To change the status, click **Update**.

7. Click **Exit** to discard any changes.

8. If Update button is clicked, the **Bulk Service Status Update** screen will display. Select the **Service Status** to update to.

9. Click **OK** to keep the changes and save or update the entry.
10. A **Summary** screen will display the number of 'Successfull Operations' (updates) and the status of each updated service.
11. Click **Ok** to clear the screen.
12. You will return to the **Results** Tab where you can select to **Exit**, or continue adjusting filters to update further services.

About Bulk Service Status Update Filters

Filter selection combinations are dependent on user's company's requirements. Selection of any filter combinations will return results in the Results Tab.

There are 4 Tabs that include field filter selections:

- Booking Tab.
- Analysis Tab (Booking and Agent).
- Service Tab. (Opens by default on entry)
- Analysis Tab (Supplier and Product).

Booking Tab

Last Worked Date From/To

The last worked date(s) of the services to be selected.

Travel Date From/To

Used to select services with a specific, or range of, travel dates of the services to be selected.

Agent From/To

Used to select services with a specific, or range of, agent(s) codes in the booking header matching the selection.

Master Agent From/To

Used to select services with a specific, or range of, Master Agent code(s) in the booking header matching the selection.

NOTE: When a Master Agent (or range of Master Agents) is entered in these fields, Tourplan will find services in those bookings where the Agent(s) have the Master Agents attached to them. When searching on the Master Agent field, the Agent field should be left blank.

Date Entered From/To

The booking entered date(s) of the services to be selected.

Consultant

The consultant code attached to the bookings whose services are to be output.

Booking Types

The type of bookings that services are to be output from.

Booking Type selection includes:

- All Booking Types - services from FIT bookings and Group bookings will be selected.
- FIT's - those services that are attached to FIT bookings will be selected.
- Groups - those services that are attached to Group bookings will be selected.

Reference

The reference attached to the booking that services are to be output from. This field will only accept the actual reference number if the Branch/Department components of the booking reference are selected from the Booking Branch and Booking Department multi select boxes.

Booking Status

By default, all booking statuses are checked and services in bookings that have that status will be selected. Un-check statuses that are not required.

Branch

By default, all branches are checked and services in bookings that have those branches will be selected.

Department

By default all departments are checked, services in bookings that have those branches will be selected.

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are booking level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the booking.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user's company's system.

Service Tab

Service Date From/To

The service date(s) of the services to be selected. (These fields must be selected)

Supplier From/To

Used to select services with a specific, or range of, supplier code(s) matching the selection.

Master Suppler From/To

Used to select services with a specific, (or range of) Master Supplier code(s) matching the selection.

NOTE: When a Master Supplier (or range of) Master Suppliers is entered in these fields, Tourplan will find those services whose supplier(s) have the Master Suppliers attached to them. When searching on the Master Supplier fields, the Supplier fields should be left blank.

Code From/To (Service)

Used to select services with a specific, (or range of) service code(s) matching the selection.

Service Status

By default, all service statuses are checked and services that are this status will be selected. Un-check those statuses that are not required.

Location

Multi select checkboxes display results for services in the booking matching the location/s selected - by default all Locations are selected.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier level selections attached to the service.

Product Analysis

The bottom two rows of this tab are the 6 Product Analysis codes. These are Product Analysis codes attached to the booking services.

Analysis fields can be expanded or minimised by using the + or - function.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected

The cell to the right of this heading will provide you with the number of services that have been selected.

Found

The system will provide you with the number of services found, matching the filter criteria.

Select All/Unselect All

Select all services found, or un-select all services selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Selected check boxes

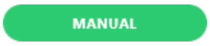
Services can be individually selected.

Save Filters for Service Status Update

The save filters feature of Service Status Update allows users to save common or frequently used Service status filters. If filters are saved, a list of pre-saved filters are given a description - which is used for easy identification and for users to know the filtered searches intended use.

Save Filters for Service Status Update

1. From the Home menu, select **Home > Operations > Service Operations > Service Status Update**.
2. Click **Manual**.

3. On the blank Bulk Service Status Update - Manual Selection screen, the **Service Tab** will open. Select the required filters from the field selections available within the **Booking Tab**, **Analysis Tab (Booking and Agent)**, **Service Tab** and the **Analysis Tab (Supplier and Product)**.

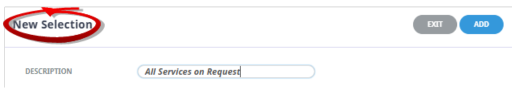
   View Bulk Service Status Update Fields to learn more about all the field selections available, or view the individual tab filters: Booking Tab, Analysis (Booking and Agent), Service, Analysis (Supplier and Product), Results.

   NOTE: There are two tabs with the heading Analysis: the Analysis Tab on the left refers to the Booking or Agent Analysis field selections, whereas the Analysis Tab on the right refers to Supplier and Service Analysis field selections.

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selection a *Description*.

8. Click **Add** to add this filter description.

9. Click **Exit** to discard any changes.

   NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the description will display each time a user opens Bulk Service Status Update. If selected for future Bulk Service Status Update, results will be returned based on the saved filters.

10. If **Add** is selected the results screen will re-display, where you can select to **Update** Statuses (following from Step 5 in the previous procedure), or **Exit**.

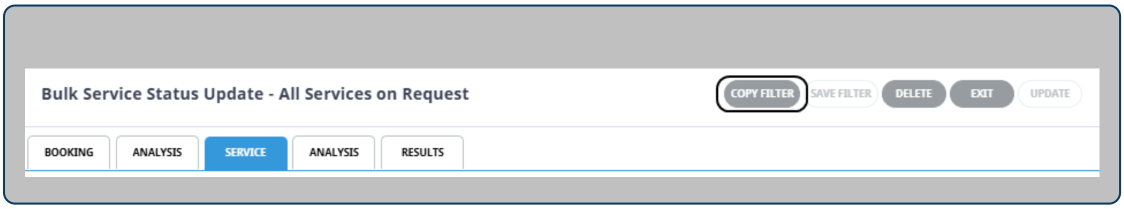
> The procedures just described are sufficient to create manual filter criteria to update Service Statuses in Bulk, and to save filters for future use. There are many unique filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

Copy Bulk Service Status Update Filters

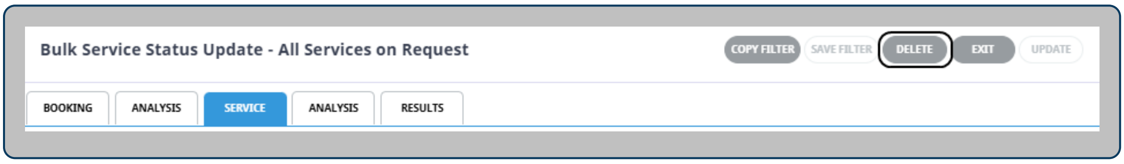
There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new Description from within the Results

Tab. Users can copy existing filters by using **Copy Filter** - make the necessary changes to filter selection. Re-saving will give the newly copied filters a New Description.



Deletion of Bulk Service Status Update Filter Descriptions

Deletion of Filter Descriptions is allowed and no warning message will display. The system will allow you to delete if the Filter Description is no longer required.



Bulk Service Insert

This feature allows users to insert a service into multiple bookings using a bulk service insert process. Filters are applied to display a list of booking results, allowing users to manage the insert of a service into selected bookings.

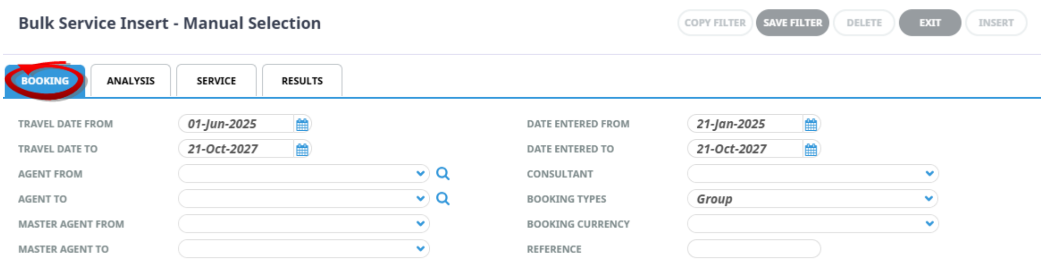
Users can view standard product options and select one product at a time to insert. The day sequence must be specified for the search, which will then be used to insert into each booking based on the day number. When the "Add Service" operation is performed, it is inserted using the Day and Sequence number from the initial selection.

> For group bookings with more than one itinerary, users can select an itinerary to insert the service. When multiple bookings are selected the data is automatically populated from the first booking selected. Any pricing or rate values are generated based on the Pax details from the first selected booking.

Bulk Service Insert

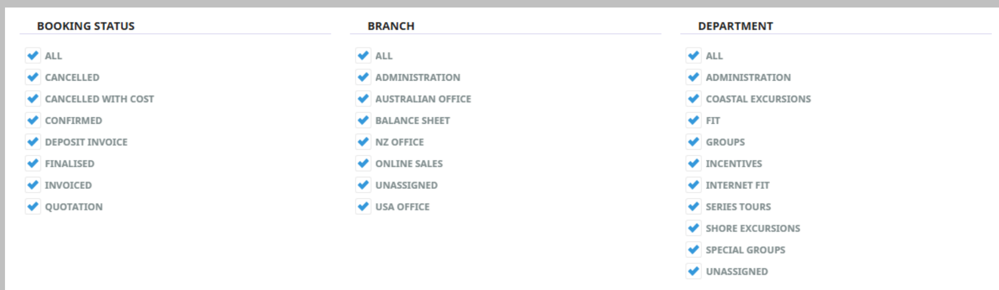
1. From the Home menu, select **Home > Operations > Service Operations > Bulk Service Insert**.

2. On the blank **Bulk Service Insert - Manual Selection** screen, the **Booking Tab** opens. Complete the fields necessary to filter a list of Booking results.



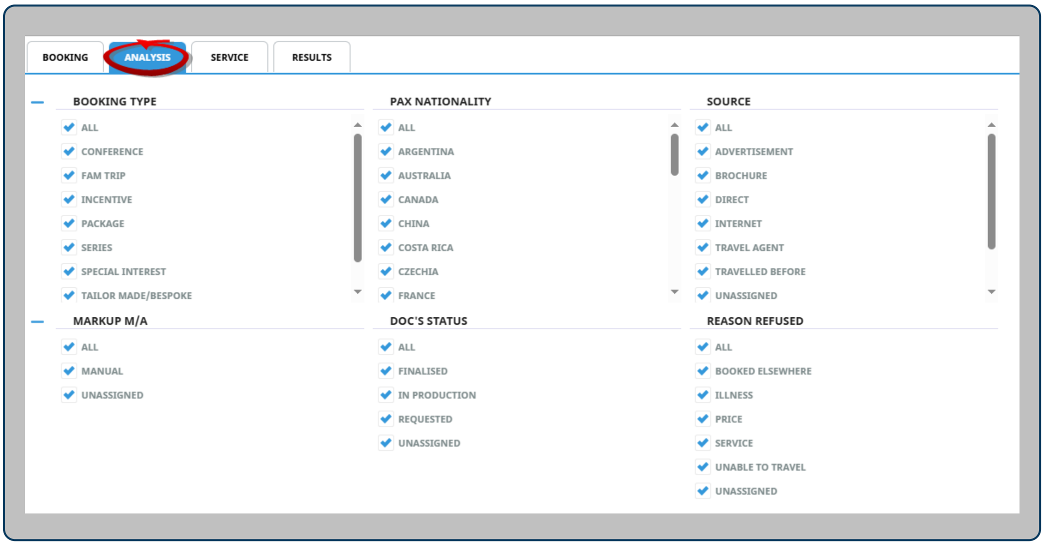
3. Keeping with the **Booking Tab**, Bookings can be filtered by 'Booking Status', 'Branch' and or 'Department'. If applicable, select the required filters.

> Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.

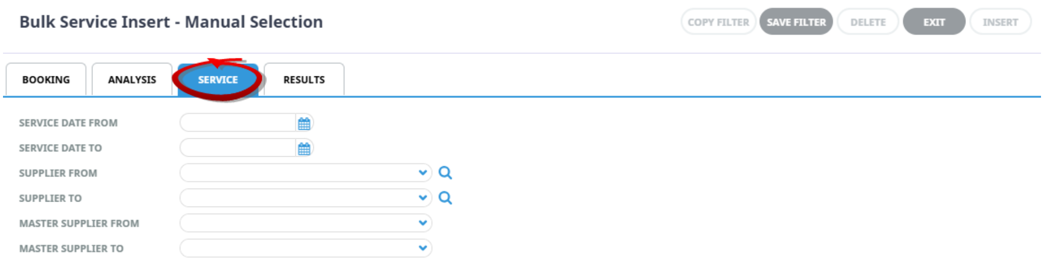


4. Click on the **Analysis Tab**, selection of current Bookings can also be made from 6 of the Booking Analysis Codes. If required select the applicable 'Analysis Codes'.

> Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



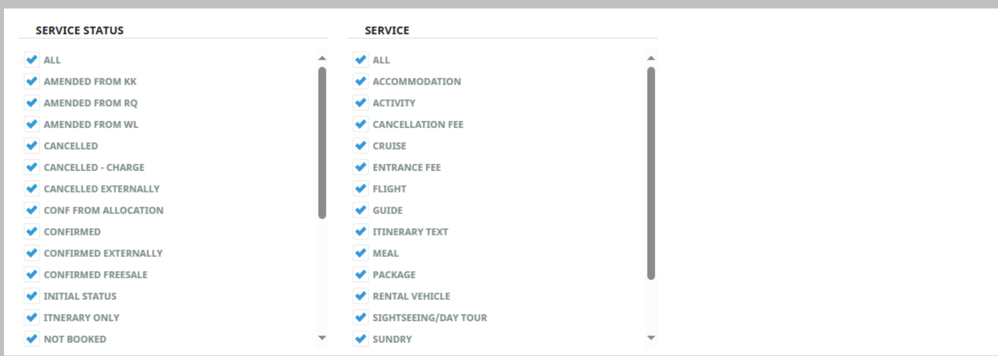
5. Click on the **Service Tab**, select a *Service Date From/To*, *Supplier*, *Master Supplier*, or *Location* to filter Bookings with specific Services.



6. Keeping with the **Service**, Bookings can be filtered using *Service Status*, *Service Type*.

Service Tab

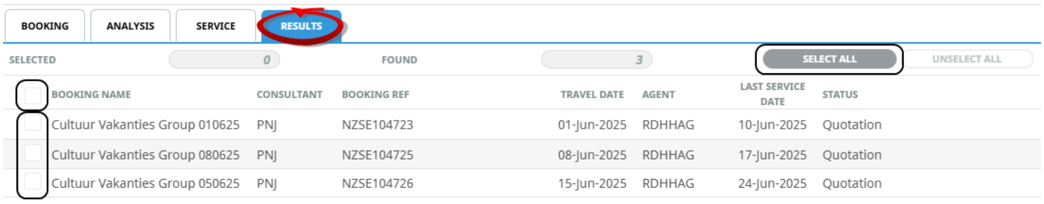
Filters used in this screen capture are examples used for Training purposes, Service Status, Service Type selection will reflect users own organisational fields.



7. Check the **completed screens**.

8. Click on the **Results Tab**. Select the Bookings using the 'Selected check boxes' next to each Booking, or use 'Select All'.

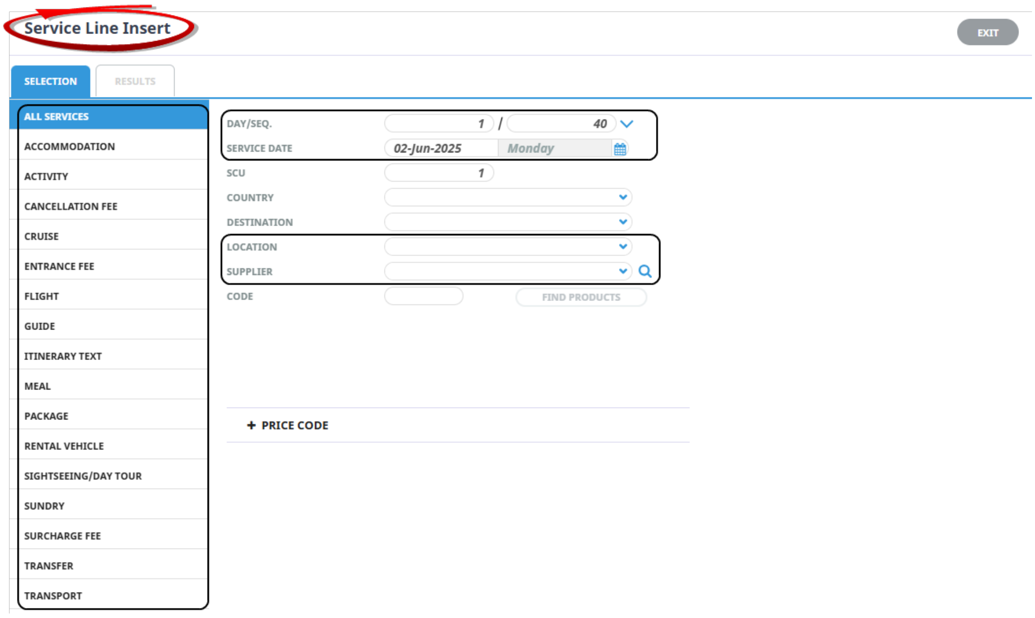
NOTE: The Insert Button will become active when Bookings are selected.



9. Click **Insert** to add a new entry.

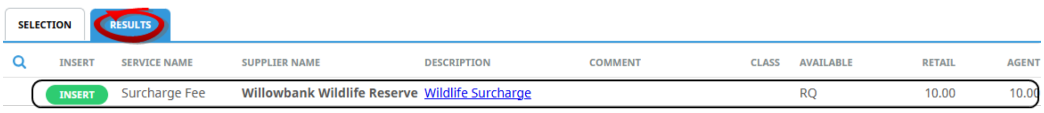
10. On the blank **Service Line Insert** screen, select a 'Location' or 'Supplier' and a 'Service Type' to search for Product.

NOTE: To insert the service mid itinerary adjust the Day/Seq fields to show the correct values, the Service Date will update if Day/Seq fields are edited. If the Service Date is edited the Day/Seq will automatically update.



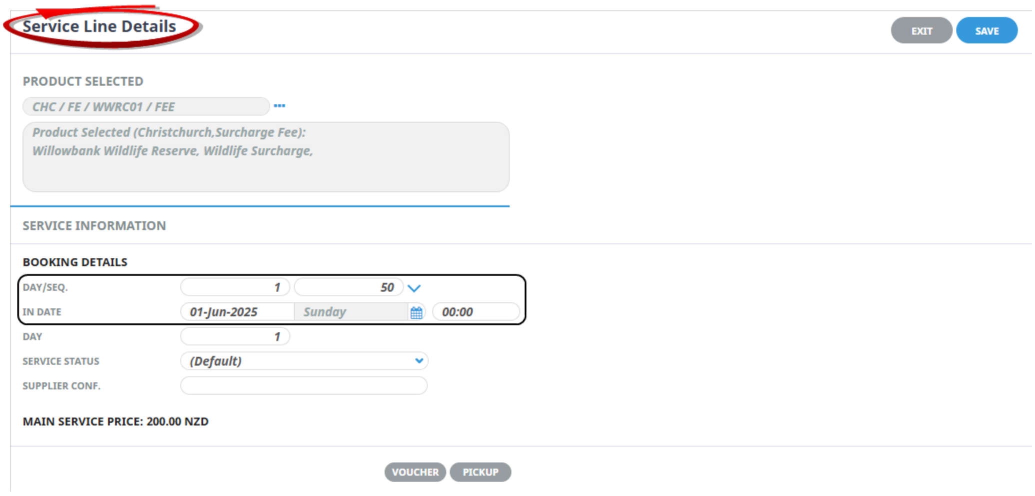
11. Click **Find Products**.

12. On the **Results tab**, select the service to insert into the Bookings.



13. Click **Insert** to add a new entry.

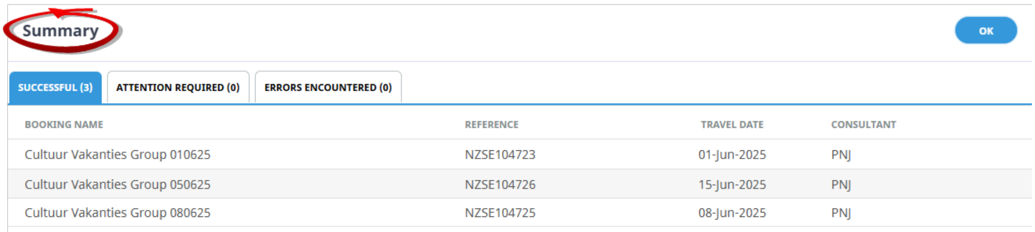
14. The **Service Line Details** screen opens with the Product Selected, check the completed screen. If pickup and drop off details are known they can be edited here.



15. Click **Save** to keep the changes.

16. Click **Exit** to discard any changes.

17. If '**Save**' was selected a Summary will appear with the number of successful Bookings updated.



18. Click **OK** to exit the modal.

About Bulk Service Insert Fields

There are some additional considerations with using this bulk service insert feature.

- Package and non-accommodation package products cannot be inserted into multiple bookings.
- External Services are unable to display in the Insert Service Results screen and therefore cannot be inserted into multiple bookings.
- If a product rate has a Split Service, Rate Category for cross seasonal bookings - the bulk service insert process will insert a single service for the entire stay length.

Booking Tab

This is the default tab that will open when selecting to insert a service within multiple Bookings in a bulk update process.

Travel Date From/To

Travel Date for Bookings is the date that appears in the header of a Booking, this is generally the date of the first service. This date range field is used to select Bookings with a specific date, or a range of travel dates.

Agent From/To

Used to select Bookings with a specific, or range of, agent(s) codes in the Booking header matching the selection.

Master Agent From/To

This selection is used to filter Bookings with a specific, or range of, Master Agent(s) codes in the Booking header matching the selection.

Date Entered From/To

This is the date the Booking was created. If selection for a range of dates is entered here Bookings that were created within the date range provided will be display in the results screen.

Booking Types

- Defaults to Groups - those bookings that are Group bookings will be selected.

Consultant

Selecting this field will filter Bookings by the consultant code attached to the Booking.

Reference

Used to select a specific Booking reference.

Booking Status

By default, all Booking statuses are checked and bookings that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all Booking branches are checked bookings that have those branches will be selected.

Department

By default all Departments are checked, bookings that have those branches will be selected.

Analysis Tab

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are Booking header level Analysis selections.

Service Tab

Service Date From/To

This is the date of the service within a Booking. If selection for a range of dates is entered here Bookings with services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Bookings with a specific, or range of, supplier(s) codes matching the selection.

Master Supplier From/To

This selection is used to find Bookings with a specific, or range of, Master Supplier(s) codes matching the selection.

Location

Use this field to find Bookings with services in the itinerary for a selected location.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Results Tab

Selected check boxes

Bookings can be individually selected.

Selected/Found Fields

These fields are non editable fields, which provide a tally of the results found, and the Bookings selected.

Select All/Unselect All

Select all Bookings found, or un-select all Bookings selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Bulk Service Insert (PCM), see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Service Line Insert

All Service Types

An alphabetic list of services types to choose from when searching the product database. Click on a service type to highlight it (i.e. to select it). One or more service types can be selected and all matching products found will be returned in the Results tab.

Day/Seq.

For the first service to be entered into the Booking, this defaults to Day 1, Sequence 10. As services are added within each day of the Booking itinerary, Tourplan increases the sequence number by 10. The day and sequence number can be used to change the order of service lines within a Booking.

NOTE: Incrementing the Sequence number in 10s, allows new services to be inserted in-between existing services on the same day as those that have already been added to the Booking. A drop-down arrow next to the sequence field when selected provides a list of existing services allowing users to locate the point within the Booking that they may want to insert the new service. The system will then allocate the correct day sequence number.

Service Date

The date being entered here is the date of the service to be selected and inserted into the Booking. The date can be changed for each service by typing a new date or using the drop-down calendar. Changing the date will automatically change the Day number. Alternatively, the Day number can be used to change the date. The day of the week will automatically update to reflect any change in the date.

Time: If a time of arrival is known, it can be entered here. If entered here, the time will transfer into the Pickup field when selecting the Pickup Button.

NOTE: Once the service is saved editing or updating a time can occur within the service line Pickup/Dropoff tab within the service details or from the Itinerary Menu > Pickup/Dropoff.

The value in this field quantifies the number of product Second Charge Units.

> Once a product is selected, the SCU gets a label, which comes from the Second Charge Unit description in the Product Database.
>
> For example, the supplier ***SCEN01 - Johnstons Scenic Coachlines***, out of ***AKL - Auckland*** has two product offerings; a charter service and an intercity service. These are found in the Product Database via *Home > Products > Product Setup* (*Price Rules tab)*.
>
> For the charter service, the First Charge Unit is ***Coach*** and the Second Charge Unit is ***Tour***, so this service will have an SCU label of ***Tour*** on the Service Line Insert screen when it is selected.
>
> Conversely, the intercity service will have an SCU label of ***Trip***, which is how the service is charged.

NOTE:

- **Accommodation** - the FCU is Room, and the SCU is Night, so the is the number of Nights required.
- **Non-accommodation** - e.g. for , the FCU is , the SCU is , so the quantity required is . The system knows (from the product setup) how many people the can take and, if the number of people exceeds the available size, the system will automatically adjust the number of FCUs () to suit so, in this example, .

Country

The Country where the service takes place or originates. Not all users will see this field, this is determined by each user company's procedures as to if this field is required.

Destination

The Destination where the service takes place or originates. Not all users will see this field. It will depend if user company's requirements.

Location

The location where the service takes place or originates.

Supplier

Used in conjunction with Service Type, Location and Code fields to search the product database.

Code

Used in conjunction with Service Type, Supplier and Location fields to search the product database.

NOTE: In addition to Service Type (which defaults to *All Service Types*), with any one of either Location, Supplier or Code, the **Find Products** green button is highlighted. The more codes that are filled in when searching for products in this screen, the more accurate and filtered the results.

Price Code (+ to expand)

There are 4 selections available each of which defines how the system will handle rate retrieval and possible re-calculations for this service.

System Price Code - this selection allows the system to handle selection of the price code. This means when the package is booked, the price code will be re-evaluated using the booking agents attached price code hierarchy without honouring the original price code used in the package service line. The System Price Code selection will ensure the package service will be booked using a price code available to the agent.

The remaining selections are:

- All Price Codes
- Applicable Price Codes
- Selected Price Codes - where a nominated price code can be selected

Selecting one of the remaining three options, will override the system selection defining this price code to be the highest priority. This will generally only be applicable if you require a package to always be booked using a specific price code over the agent price code defaulting logic.

Insert Service Line Results

The Results tab shows a list of all products found that match the selection criteria. Products are presented in list form under the following columns.

NOTE: All scrollable lists can have columns added or removed per user (i.e. you can change the default columns that appear in your view of the list). Click on a space in between two column labels (if you click on the label itself, the scroll will re-sort based on the column clicked on). The list of available column names will display and they can be check-box selected/deselected. The width can also be set, as can normal or bold font.

Filter Button

The results tab provides users with an additional filter option, products and services can be filtered by class, locality or attached amenities.

NOTE: *This is dependant on if user company's procedures have selected to use these fields in their product setup*.

Consultants can also define a rate price range for results to return based on minimum and maximum agent values.

Search Icon

There is a search icon located next to the column 'Book' heading. This allows users to quickly search the Product Search application for an existing entry. An additional search field will enable users to insert text to search, and previous and next (arrow buttons) identify entries which match the search criteria.

The Enter key can be used as a quick key to move to the next matched searched result.

Insert

A button labelled Insert allows the service to be inserted into the selected bookings or PCMs.

Location Name

Full name of the location where the service is provided.

Service Name

Full name of the service (from the Selection tab under *All Services*).

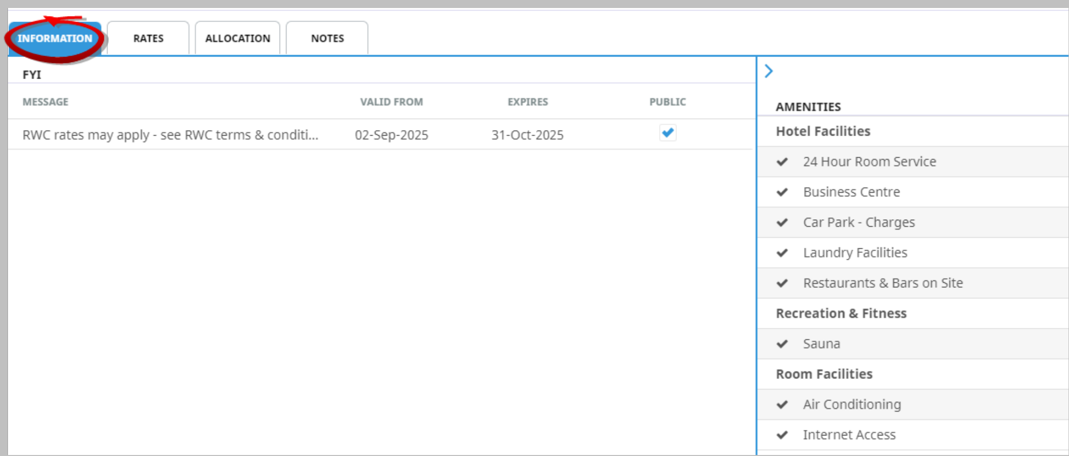
Name

Full name of the service supplier.

Description

A drill-down link to further information about the service, including *Rates* and *Notes*. Book and Hold buttons are also available on the drill-down screen (albeit coloured blue, rather than green and grey).

This example shows a property that has FYI message information, and shows the amenities available at the property. Clicking on the other tabs within this screen will allow users to see further detail.



Comment

A further field that is sometimes used as an extra descriptive field for product, or for an internal note. An example could be for accommodation services, where this organisation uses the comment field to show meal inclusions - Includes light continental breakfast.

Class

For accommodation services, this label identifies the class of accommodation; e.g. 4-Star, 5-Star, Back-packers, Luxury Boutique etc.

Sell

The cost price in the Product Database, plus markups (regardless of source), less agent commission.

NOTE: It is possible that the same product displays multiple times. This is because of INI settings that determine what is to display by default. Where the same product is displayed multiple times, it is once for each price code that has been set up against the date range for the product.

"Booked" is not Saved

It is important to remember that, when viewing a list of results (or any aspect of a service within these tabs), the service has *not yet been inserted into the , even if **"Book"** has been clicked*. The tabs are available to refine selections and to inquire on various aspects of a service. Services are not saved into the until the Insert New Service process is complete, which requires each service

A full list of field columns available within the Results tab is available Service Line Insert (Service Scroll Headings).

Summary

A summary of the Booking Bulk Service Insert process is displayed to inform users of successful service insertion. Additional tabs highlight Bookings that require further attention to add a new service or indicate if an error has occurred.

Summary Modal displays three tabs:

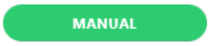
- **Successful** - where the total number of processed Bookings is displayed in the bottom left corner of the Modal. The number of Bookings successfully updated displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, and Travel Date.
- **Attention Required** - where the number of Bookings requiring attention displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, Travel Date, Rate Status, and a Message column indicating the attention required. For example: Rates have expired, a cross season rate, a sequence number changed, allocation status.
- **Errors Encountered** - where the number of Bookings that the service line was unable to be added to the Booking displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, Travel Date, Rate Status, and a Message column indicating the error. For example: no available sequence number for the relevant day, product not allowed to be used on that day.

Save Bulk Service Insert Filters

Common or frequently used Bulk Service Insert Filters can be saved and given a Description so that repeatable tasks can be easily accomplished.

Bulk Service Insert

1. From the Home menu, select **Home > Operations > Service Operations > Bulk Service Insert**.
2. Click **Manual.**

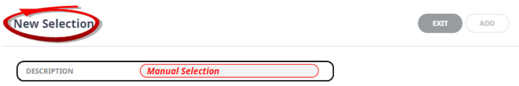
   

3. On the blank Bulk Service Insert - Manual Selection screen, the **Booking Tab** will open, select the required filters from the field selections, and tabs available.

   View "About Bulk Service Insert Fields" on page 221 to learn more about all field selections available, or view the individual tab filters; " PCM Tab" on page 221, "Analysis Tab" on page 222 (Booking), "Service Tab" on page 222, or " Results Tab" on page 222.
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selections a 'Description'.

8. Click **Add** to add this filter description.

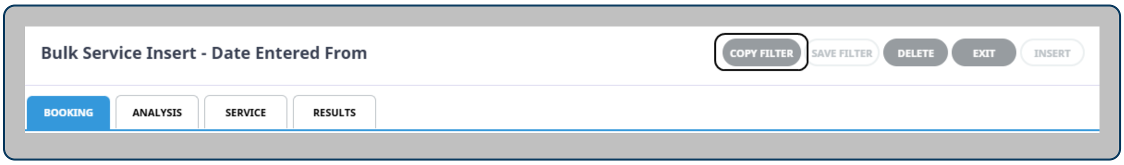
9. Click **Exit** to discard any changes.
10. NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Service Insert. If selected for future Bulk Service Insert processing, results will be returned based on the saved filters.

The procedures just described are sufficient to create manual filter criteria to manage Bulk Service Insert features - saving filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

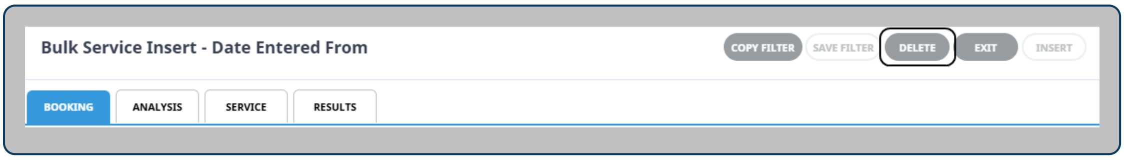
Copy Bulk Service Insert Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Bookings Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Bulk Service Insert Filters

Deletion of Filter Descriptions is allowed, to be able to manage currency of tasks and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to delete, the filters will not be able to be retrieved again.



Substitute Service

The Substitute Service facility allows a service to be replaced in bookings, in bulk, with an alternative service, without having to open each booking individually.

This can be useful when (e.g.) a decision has been made not to use a particular service from a certain date, and an arrangement has been made to use another service from that date. Similarly if a supplier closes down and bookings already exist that have that supplier's service in it, a replacement service can be entered into the bookings in bulk.

NOTE: Services will not be substituted if:

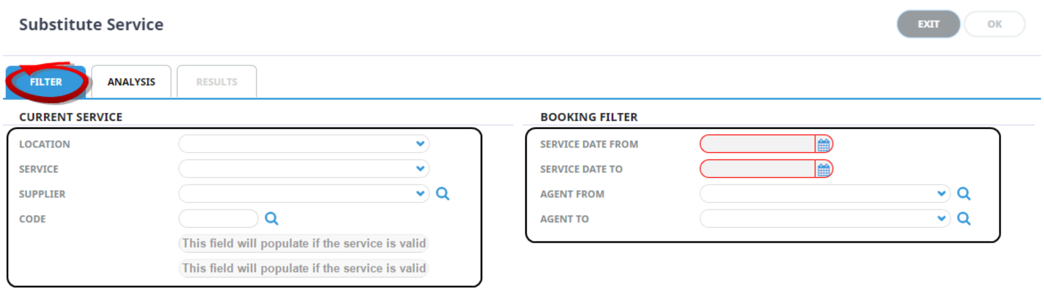
- One of the selected services in a booking is closed.
- A selected service is in an FIT booking as part of a 'Book On' package.
- A selected service is in an FIT booking as a 'Sell on Request' package, and the replacement service is not set up in the package as a valid substitutable service.
- The replacement service is the same as the original service.
- The service category is different from the original service category.
- The location of the service is different from the original service location.
- The original service has a Special Offer Fixed Nights or Extra Nights service.

Substitute Service

1. From the Home menu, select **Home > Operations > Service Operations > Substitute Service**.

2. On the blank **Substitute Service** screen, the **Filter Tab** will open, in the 'Current Service' section, select the *Location*, *Service*, *Supplier*, and enter the *Service Code*. Select the required *Service Date From/To* dates.

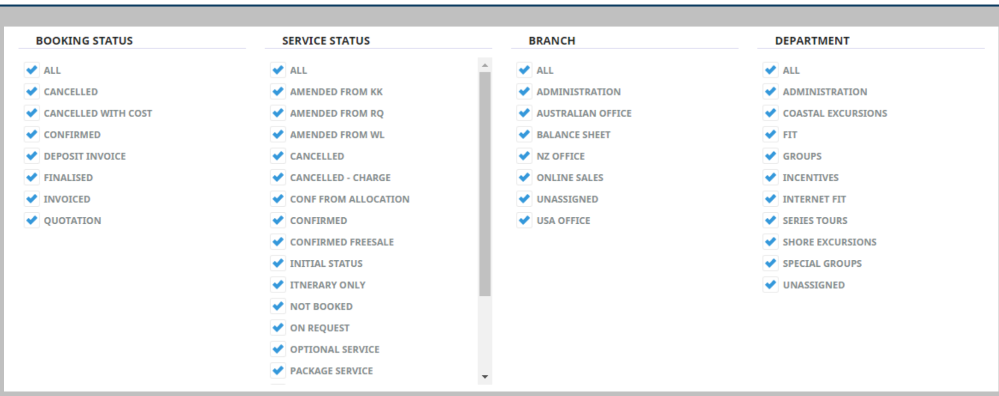
   NOTE: All 'Current Service' fields are to be completed, manual entry of the Service type is required, the Description and Comment fields from the product option will populate if a valid service has been selected. The Booking Filter **Service Date From/To** fields are mandatory, the results tab will not return results until these two fields have dates applied.

3. Keeping with the **Filter Tab**, services to be substituted can be filtered using *Booking Status*, *Service Status*, *Branch* and or *Department*. If applicable, select the required filters.

   Filter Tab

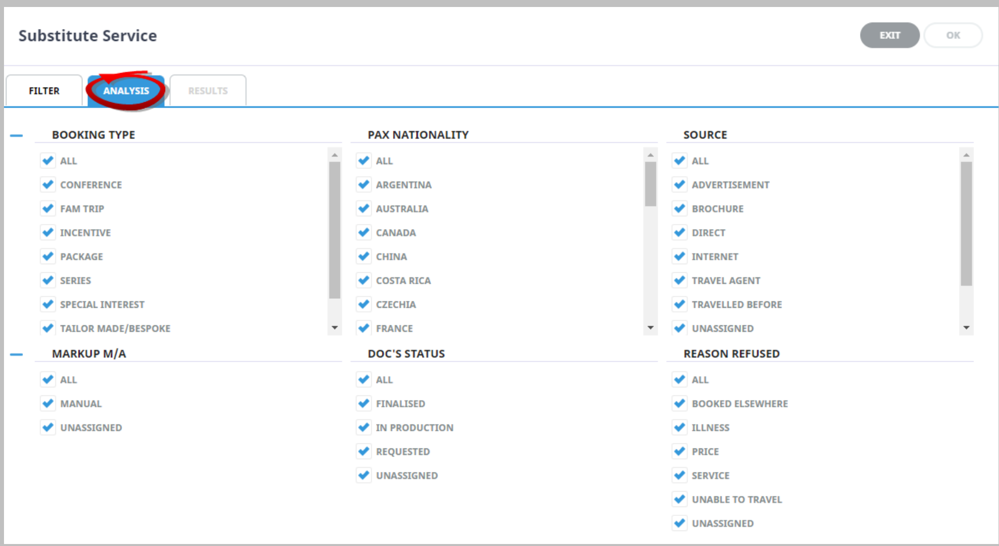
   Filters used in this screen capture are examples used for Training purposes, Status Branch and Department selection will reflect users own organisational fields.



4. Click on the **Analysis Tab** a selection of current services can also be made from 6 of the Booking Header Analysis Codes. If required select the applicable *Analysis Codes*.

Analysis Tab

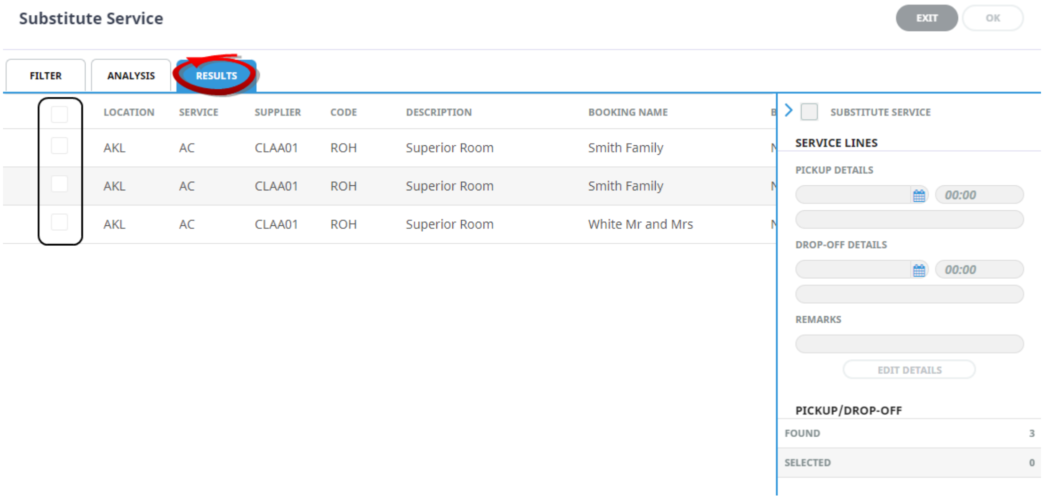
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



5. Check the **completed screens**.

6. Click on the **Results Tab**. Select the services using the **Select check boxes** next to each service, or use **Select All**.

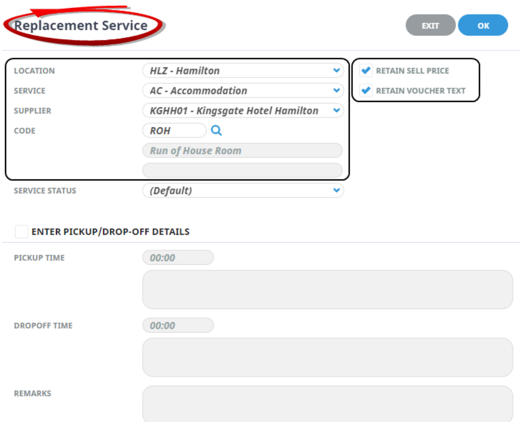
NOTE: The Substitute Service check box will become active when services are selected.



7. Click **OK** to keep the changes and save or update the entry.
8. On the blank **Replacement Service** screen, select the *Location*, *Service*, *Supplier*, and enter the *Service Code* for the Replacement Service.

   NOTE: All 'Replacement Service' fields are to be completed, entry of the (product) Code is required. The Description and Comment fields from the product option will populate if a valid product has been selected.
9. If required un-select *Retain Sell Price* and *Retain Voucher Text* check boxes.

   NOTE: By default the Retain Sell Price and Retain Voucher text check boxes are selected, users are to un-select if the replacement service is **not** to use the current service sell price or voucher text attached to the service itself or product rate.

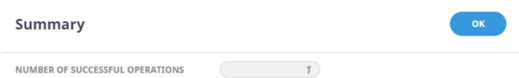


11. Keeping with the **Replacement Service** screen, select *Service Status*.

12. Click **OK** to keep the changes and save or update the entry.

13. Click **Exit** to discard any changes.

14. If '**OK**' was selected a Summary will appear with the number of successful services to be updated.

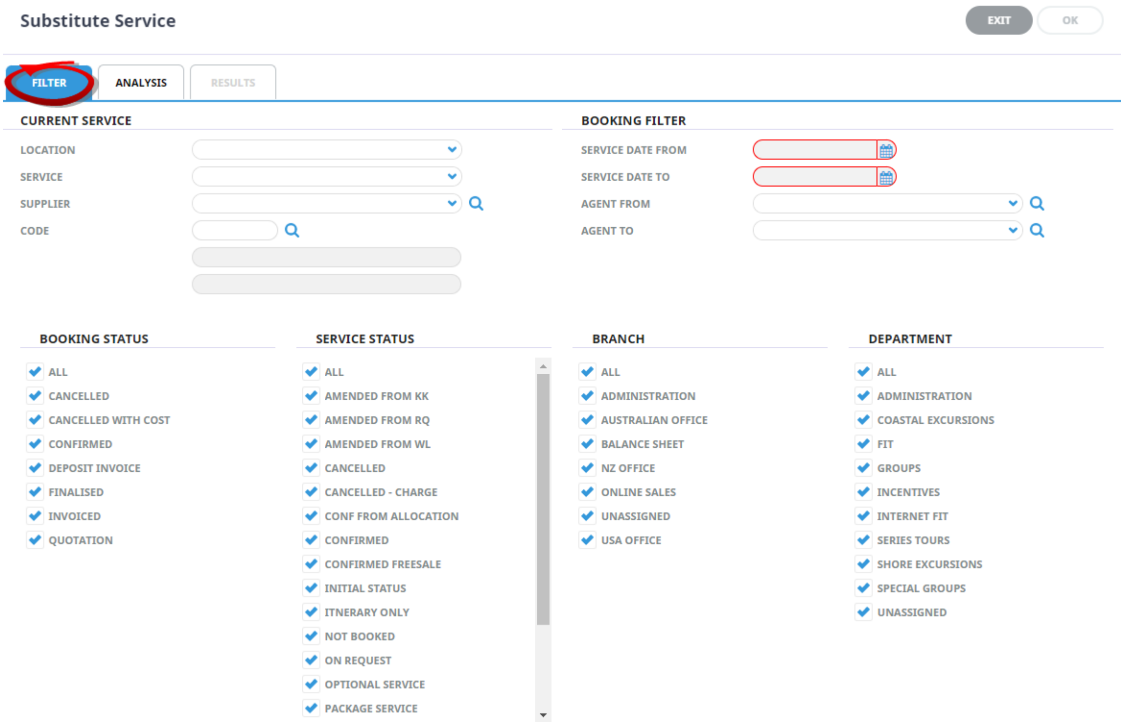


15. Click **OK** to exit the modal.
16. **Substitute Service** screen will re-display select **Exit** to close.

About Substitute Service Fields

Filter Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes options to select Booking Status, Service Status, Branch and or Department.



Current Service Fields

The 'Current Service' selection, uses drop downs to select Location, Service, Supplier code for the service that is to be replaced. The (product) Code is to be inserted manually.

When a valid service has been selected the grayed fields below the Code will populate with the product description, and comments if used for the service.

NOTE: If data does not display in the fields below the Code then incorrect detail has been entered.

Booking Filter

Service Date From/To

The selected current service can be filtered based on the date of the service, this is a mandatory field entry.

Agent From/To

Services in bookings with a specific agent or range of agents can be selected.

Booking Status Section

Check the boxes alongside the booking status(es) which are to be included in the filter. e.g., if bookings with a cancelled status are not to be included, uncheck the cancelled status checkbox.

Service Status Section

Check the boxes alongside the service status that are to be included in the filter, e.g., if bookings with a cancelled status are not to be included, uncheck the cancelled status(es) checkbox(es).

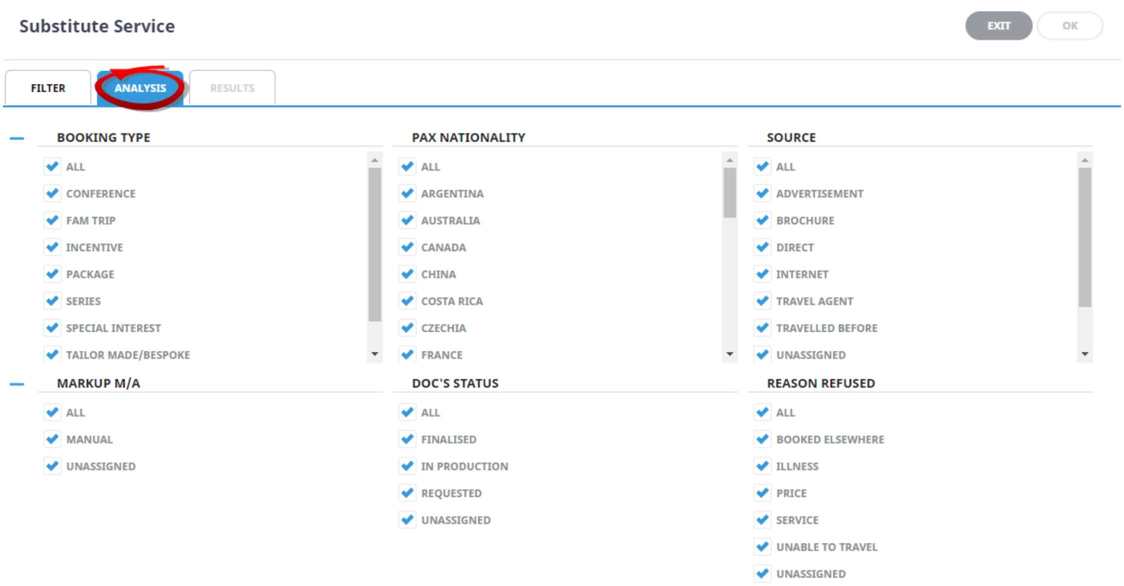
Booking Branch Section

If only bookings for specific Branch(s) need to have the service substituted, check the appropriate box(es).

Booking Department Selection

If only bookings for specific Department(s) need to have the service substituted, check the appropriate box (es).

Analysis Tab (Booking Analysis)



Analysis Codes

The selection of the current service can also be made based on the six booking header Analysis Codes.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or check boxes, see the System Setup User Manual.

Results Tab

Selected check boxes

Services can be individually selected.

Select All/Unselect All

Select all services found, or un-select all services selected.

Service Lines

Pickup and Drop-Off details will display if the service has this information previously attached to the service. The pick up and drop off information can be updated here by completing the required fields and selecting 'Edit Details'.

Found

The system will provide you with the number of services found, matching the filter criteria.

Selected

A numerical value showing the number of services that have been selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Substitute Services, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Replacement Service Selection

These fields are where the detail of the replacement service is entered.

Use the drop-downs or enter the codes to select the Location, Service and Supplier of the replacement service to be used. Enter the (product) Code manually.

NOTE: If data does not display in the fields underneath the drop-down or (product) Code field(s), then incorrect detail has been entered—i.e., the (product) Description should display underneath the (product) Code field.

Service Status

This field is defaulted to 'Default', however if a service status is selected here the system will update the service status in the booking(s) at the time of replacing the service.

Retain Sell Price

When checked, the system will adjust the cost price of the service in the booking to reflect the cost price of the replacement service. However, the sell price from the current service will be held against the replacement service. This feature is useful when an original selling price of bookings needs to be maintained.

Retain Voucher Text

When checked, any voucher text (entered at either service or rate level) will be written into the replacement service line. This feature is useful if booking specific voucher text has been entered against the current service and these details are the same for the replacement service.

Enter Pickup/Drop-off Details

Existing pick up and drop off details will store within the replaced service if the pick up and drop of fields were used in the initial booking.

NOTE: To amend pick up and drop off details for the substituted service select the 'Enter Pickup/Drop-off Details' check box and insert information into the; Pick up Time, pick up text, Drop off Time, drop off text, and Remarks text. This information will then be updated alongside substituted service pick up/drop off fields within the booking.

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CHAPTER 5

PCM Operations

PCM Operations is an application that contains Bulk PCM Operation utilities. Not all companies will use all of these functions: usage will be dependent on which aspects of the Tourplan system a particular company has a need for.

Services can be substituted, and bulk replacement of one service in a range of PCMs with different services can be completed. There is also a feature available to Update Pickup and Drop off service information for PCMs in a bulk update process. Recalculation of PCM Quotes, PCM Packages or Itinerary Services can be done in bulk from the PCM Operations applications.

Operations also offers PCM Status Update function where filters can be set to view PCMs and a bulk PCM Status can occur.

In this chapter ...

TOURPLAN

Substitute Service

The Substitute Service facility allows a service to be replaced in PCM Quotes & PCM Packages, in bulk, with an alternative service, without having to open each PCM individually.

This can be useful when (e.g.) a decision has been made not to use a particular service from a certain date, and an arrangement has been made to use another service from that date. Similarly if a generic supplier is used to build and cost series tours and a supplier is substituted when final numbers are known, a replacement service can be entered into the PCMs in bulk.

NOTE: Services will not be substituted if:

- The replacement service is the same as the original service.
- The service category is different from the original service category.
- The location of the service is different from the original service location.
- The original service has a Special Offer Fixed Nights or Extra Nights service.

Packaged Services will not substitute if:

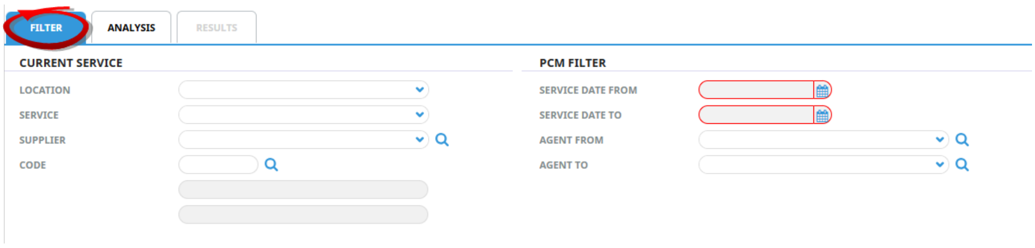
- A selected service is in a PCM package, and the replacement service is not set up in the package as a valid substitutable service.
- The package header does not allow substitute services.
- A Non-Accommodation Package replacement service is a non non-accommodation service type.

Substitute PCM Service

1. From the Home menu, select **Home > Operations > PCM Operations > Substitute Service**.

2. On the blank **Substitute Service** screen, the **Filter Tab** will open, in the 'Current Service' section, select the *Location*, *Service*, *Supplier*, and enter the *Service Code*. Select the required *Service Date From/To* dates.

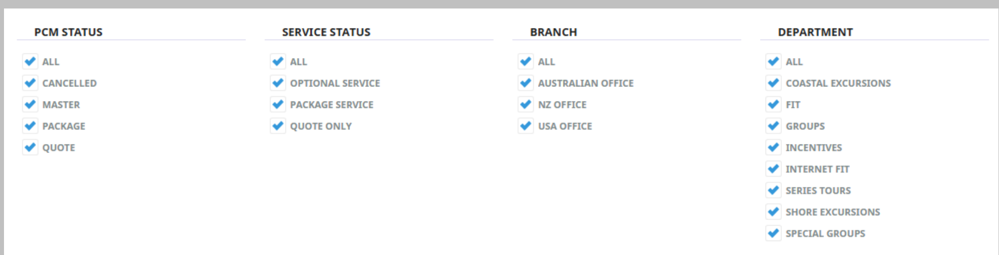
   NOTE: All 'Current Service' fields are to be completed, manual entry of the Service type is required, the Description and Comment fields from the product option will populate if a valid service has been selected. The PCM Filter **Service Date From/To** fields are mandatory, the Results tab will not return results until these two fields have dates applied.



3. Keeping with the **Filter Tab**, services to be substituted can be filtered using *PCM Status*, *Service Status*, *Branch* and or *Department*. If applicable, select the required filters.

Filter Tab

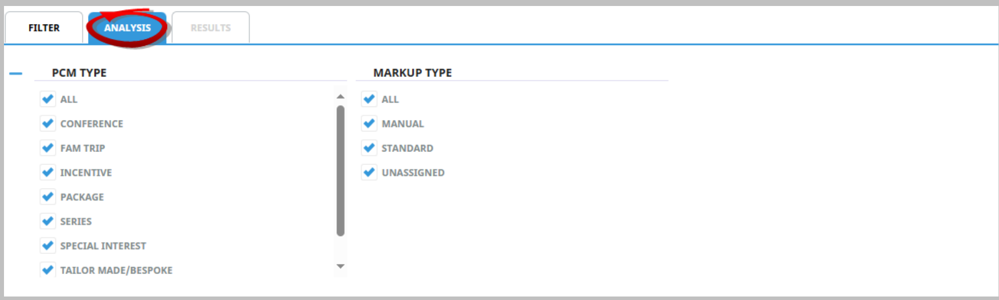
Filters used in this screen capture are examples used for Training purposes, Status', Branch and Department selection will reflect users own organisational fields.



4. Click on the **Analysis Tab** a selection of current services can also be made from 6 of the PCM Header Analysis Codes. If required select the applicable *Analysis Codes*.

Analysis Tab

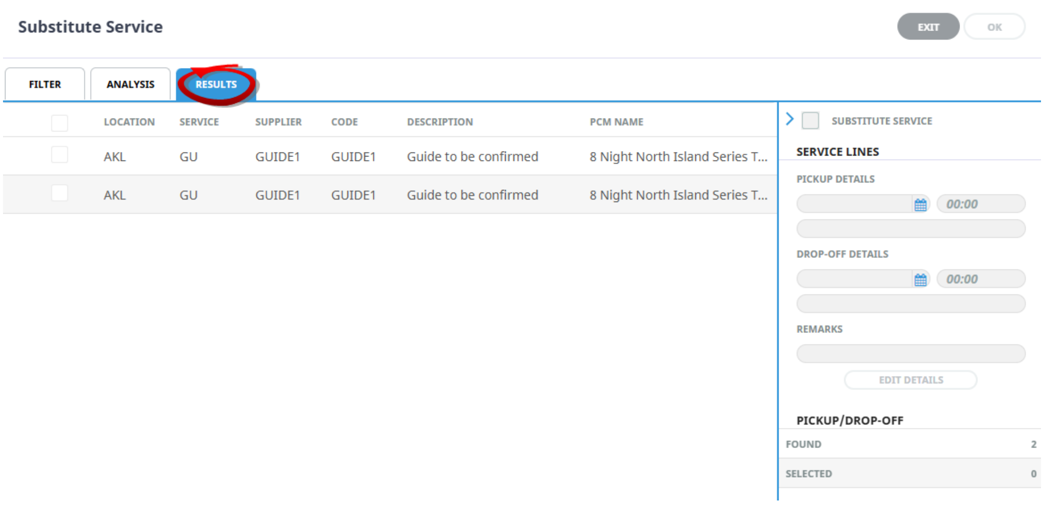
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



5. Check the **completed screens**.

6. Click **Ok** or click on the **Results Tab**. Select the services using the **Select check boxes** next to each service, or use **Select All**.

NOTE: The Substitute Service check box will become active when services are selected.

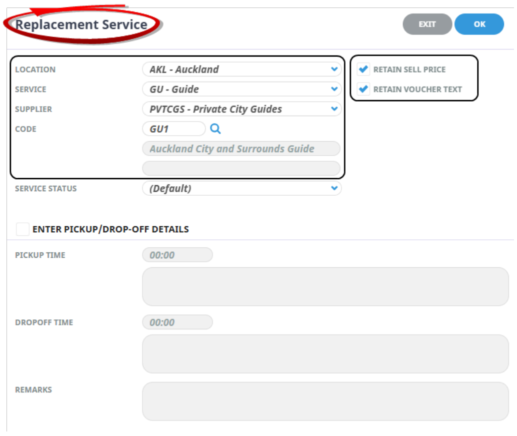


7. Click **OK** to keep the changes and save or update the entry.
8. On the blank **Replacement Service** screen, select the *Location*, *Service*, *Supplier*, and enter the *Service Code* for the Replacement Service.

NOTE: All 'Replacement Service' fields are to be completed, entry of the (product) Code is required. The Description and Comment fields from the product option will populate if a valid product has been selected.

9. If required un-select *Retain Sell Price*, and *Retain Voucher Text* check boxes.

NOTE: By default the **Retain Sell Price and Retain Voucher Text** check boxes are selected, users are to un-select if the replacement service is **not** to use the current service sell price or voucher text attached to the service itself or product rate.

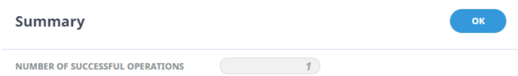


11. Keeping with the **Replacement Service** screen, select *Service Status*.

12. Click **OK** to keep the changes and save or update the entry.

13. Click **Exit** to discard any changes.

14. If **OK** was selected a Summary will appear with the number of successful services to be updated.

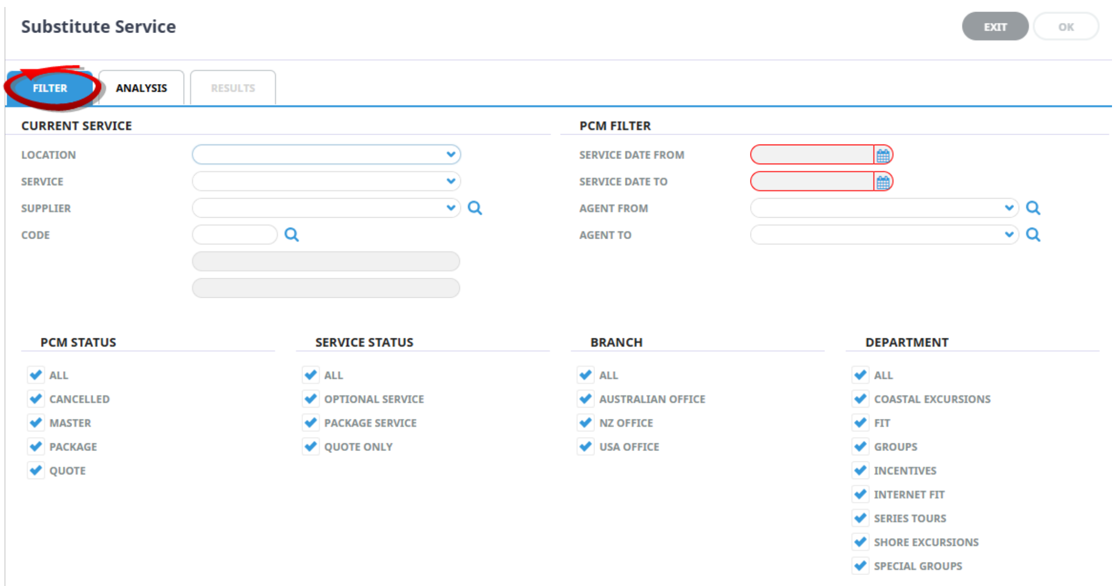


15. **Substitute Service** Results screen will re-display select **Exit** to close.

About Substitute Service Fields

Filter Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'PCM Filter' selections. The bottom section includes options to select PCM Status, Service Status, Branch and or Department.



Current Service Fields

The 'Current Service' selection, uses drop downs to select Location, Service, Supplier code for the service that is to be replaced. The (product) Code is to be inserted manually.

When a valid service has been selected the grayed fields below the Code will populate with the product description, and comments - if used for the service.

NOTE: If data does not display in the fields below the Code then incorrect detail has been entered.

PCM Filter

Service Date From/To

The selected current service can be filtered based on the date of the service.

Agent From/To

Services in PCMs with a specific agent or range of agents can be selected.

PCM Status

Check the boxes alongside the PCM status(es) which are to be included in the filter. e.g., if PCM's with a cancelled status are not to be included, uncheck the cancelled status checkbox.

Service Status

Check the boxes alongside the service status that are to be included in the filter. For example, if PCMs with a 'Master' status are not to be included, uncheck the Master status checkbox.

Branch

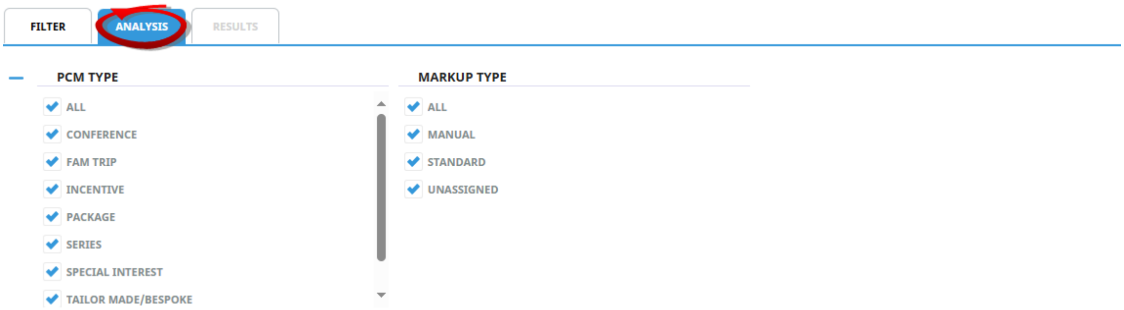
If only PCMs with specific Branch(s) need to have the service substituted, check the appropriate box(es).

Department

If only PCM's with specific Department(s) need to have the service substituted, check the appropriate box (es).

If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab (PCM Analysis)



Analysis Codes

The selection of the current service can also be made based on the six PCM header Analysis Codes.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or check boxes, see the System Setup User Manual.

Results Tab

Selected check boxes

Services can be individually selected.

Select All/Unselect All

Select all services found, or un-select all services selected.

Service Lines

Pickup and Drop-Off details will display if the service has this information previously attached to the service. The pick up and drop off information can be updated here by completing the required fields and selecting 'Edit Details'.

Found

The system will provide you with the number of services found, matching the filter criteria.

Selected

A numerical value showing the number of services that have been selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Substitute Services, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Replacement Service Selection

These fields are where the detail of the replacement service is entered.

Use the drop-downs or enter the codes to select the Location, Service and Supplier of the replacement service to be used. Enter the (product) Code manually.

NOTE: If data does not display in the fields underneath the drop-down or (product) Code field(s), incorrect detail has been entered—i.e., the (product) Description should display underneath the (product) Code field.

PCM Replacement Service considerations:

- All pax range and supplement costs revert to the original PCM Header values.
- Staff counts are assessed based on the setup of the replacement product rules.
- If the sell price is retained then the Agent/Retail price is unchanged regardless of changes to the pax configuration values.
- If the service includes extras the substituted service will inherit the pax values from the PCM Header.

Service Status

This field is set to 'Default', however if a service status is selected here the system will update the service status in the PCM(s) at the time of replacing the service.

Retain Sell Price

When checked, the system will adjust the cost price of the service in the PCM to reflect the cost price of the replacement service. However, the sell price from the current service will be held against the replacement service. This feature is useful when an original selling price of PCM needs to be maintained.

Retain Voucher Text

When checked, any voucher text (entered at either service or rate level) will be written into the replacement service line. This feature is useful if PCM specific voucher text has been entered against the current service and these details are the same for the replacement service.

Enter Pickup/Drop-off Details

Existing pick up and drop off details will store within the replaced service if the pick up and drop of fields were used in the initial PCM.

NOTE: To amend pick up and drop off details for the substituted service select the 'Enter Pickup/Drop-off Details' check box and insert information into the; Pick up Time, Pick Up Text, Drop off Time, Drop Off Text, and Remarks text. This information is then be updated alongside substituted service pick up/drop off fields within the PCM.

Update Pickup & Dropoff

Bulk updates to pick up and drop off times for services can be achieved when using the PCM Operations function Update Pickup and Drop off. Some organisations may need the facility to locate or update a number of PCMs at once.

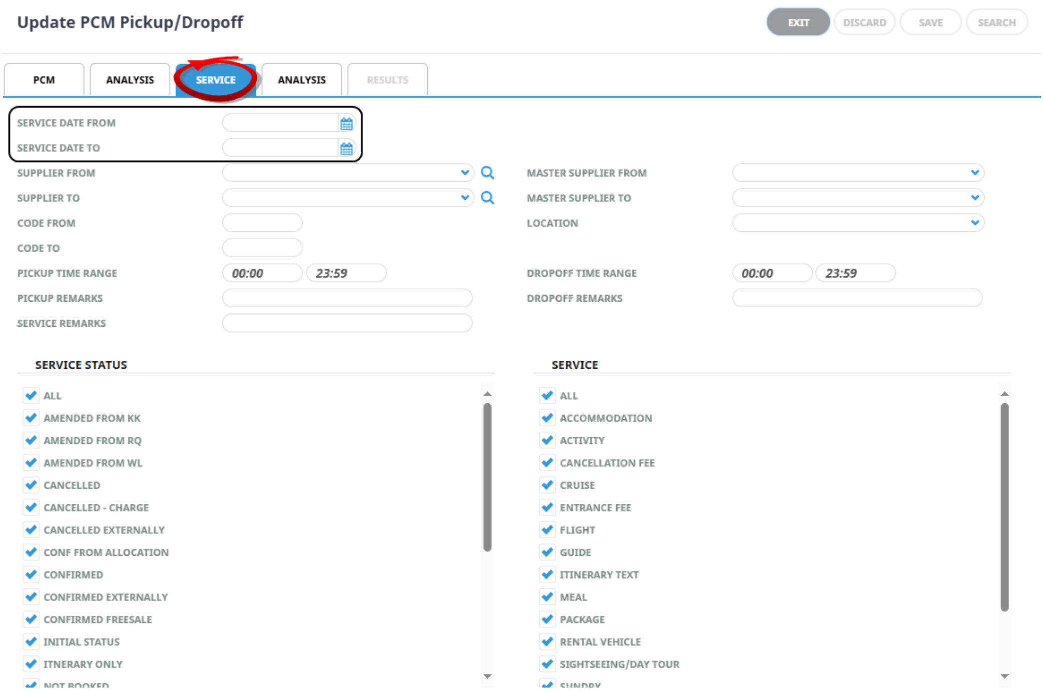
The Update Pick up/Drop off menu option allows users to set filter options to return required results, and amendment to pick up/drop off points or times can be performed to multiple services across multiple PCMs.

Updating (PCM) Pick Up & Drop Off Ddetails

1. From the Home menu, select **Home > Operations > PCM Operations > Update Pickup and Dropoff**.

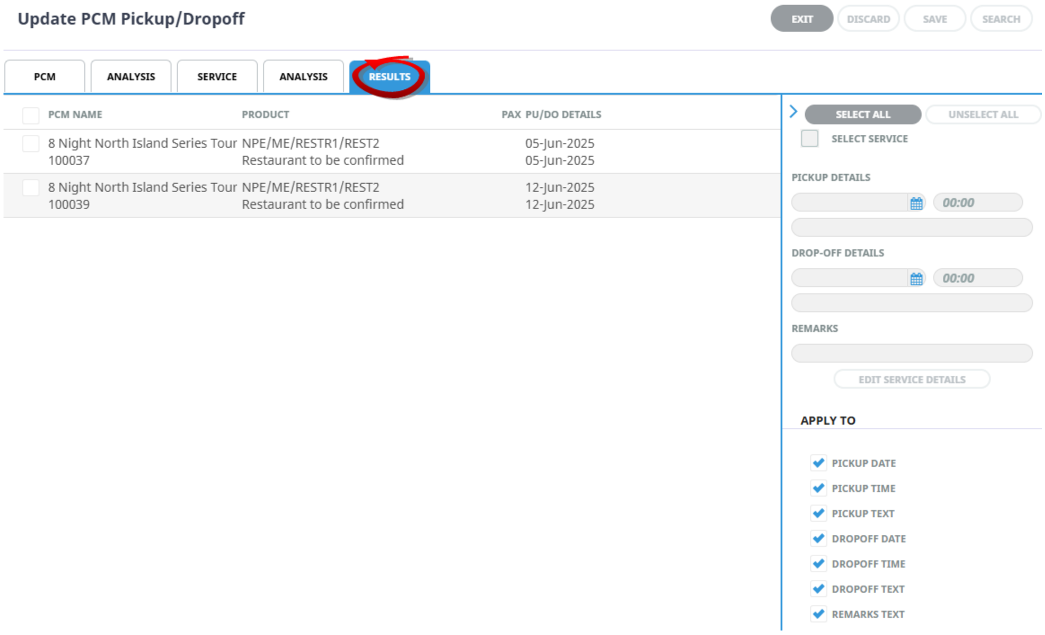
2. On the blank **Update Pickup/Dropoff** screen, the **Service Tab** will open, select fields to narrow the search filter results.

   NOTE: '**Search**' will enable when the Service From/To fields have dates are selected. Further filter selections are available from the following tabs *PCM Tab*, *Analysis Tab* (PCM), *Service Tab* and *Analysis Tab* (Product).

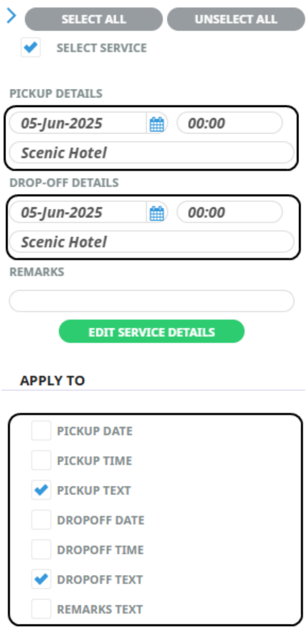
   

3. Check the **completed screens**.

4. Click Save, or click on the **Results Tab**. Select the services to update. There are three ways to select:
   a. Using the **check-box**.
   b. Or clicking on the **PCM Service**.
   c. If all PCM services listed are to be updated, use **Select All** for bulk selection.

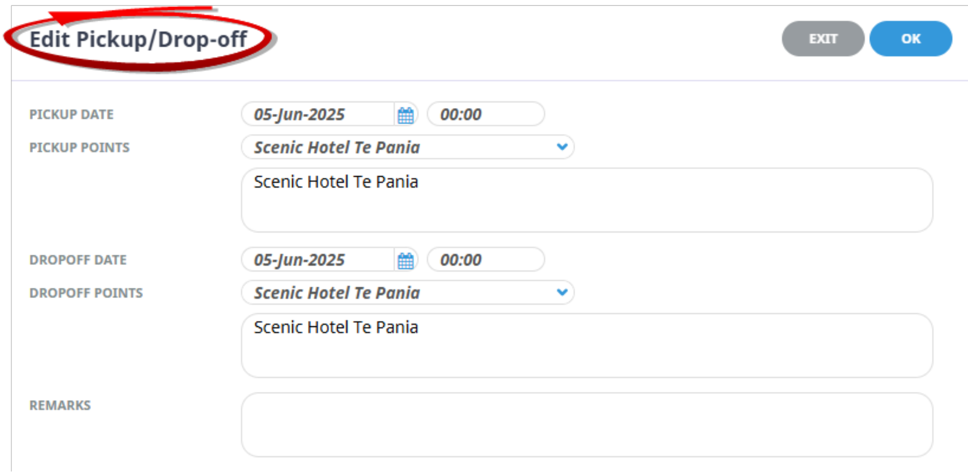


5. Update the **Pick Up/Drop Off** details on the right of the screen, and select the **Applies To** check box (s) to update specific fields.



6. Or click **Edit Service Details**, to enter the Pickup and drop off details.

a. Edit the required **Pick up/Drop off fields**.



b. Click **OK** to keep the changes and save or update the entry.

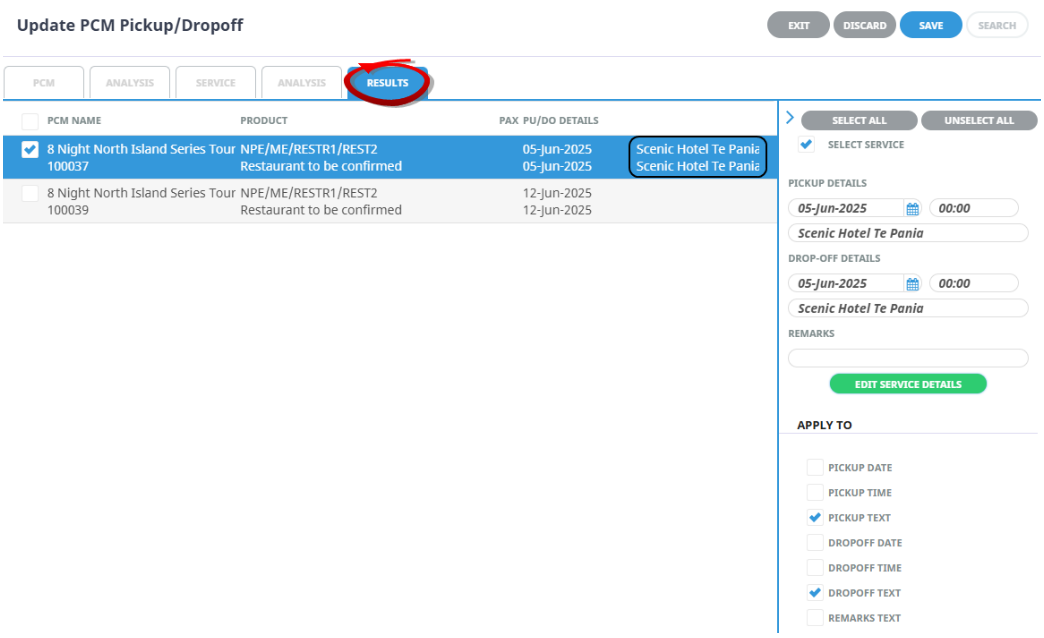
7. Click **Save** to keep the changes.

8. Click **Exit** to discard any changes.

9. If **Save** was selected a Summary will appear with the number of successful PCMs to be updated.

10. Click **OK** to keep the changes and save or update the entry.

11. The **Update Pick Up and Drop Off** Results tab will re-display, the service details will have updated and can be viewed from here.



12. Click **Save** to keep the changes.

About the Service Tab

Service Date From/To

NOTE: Mandatory field selection to trigger the Save button activation.

This is the date of the service within a PCM. Selection for a range of dates is entered and Pick Up and Drop off details for services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Pick up and Drop off details with a specific, or range of, supplier(s) codes matching the selection.

Code From/To

Selection of a specific service code or range of service codes.

Pick up Time Range

Used to select a range of pick up times for services that fall within the time period provided.

Pick up Text

Used to select specific pick up points selected in the PCM.

Service Remarks

This selection is used to filter by specific remarks stored within the PCM service.

Master Supplier From/To

Used to select specific Master Suppliers, or range of, Master Supplier code(s) matching the selection.

Location

Select to filter by a service location.

Drop off Time Range

Used to select a range of drop off times for services that fall within the time period provided.

Drop off Text

Used to filter by specific drop off points selected within the PCM.

Service Status

By default, all PCM Service Statuses are checked. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Analysis Tab (PCM and Agent Analysis)

PCM Analysis

The top two rows of this tab are the 6 PCM Analysis codes. These are PCM header level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the PCM.

Analysis fields can be expanded or minimised by using the + or - function.

PCM Tab

Base Date From/To

Base Date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCMs with a specific date, or Pick up and Drop off details for PCMs that fall within a range of Base Dates.

PCM Name

This is the name of the PCM that appears in the header of a PCM Quote or PCM Package.

PCM Ref From/To

Used to select a specific PCM reference or range of references.

Agent From/To

Used to select Pick up and Drop off Details with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Consultant

Selecting this field will filter PCMs by the consultant code attached to the PCM Quote or PCM Package.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here Pick up and Drop off details for PCMs that were created within the date range provided will be display in the results screen.

Master Agent From/To

Used to select Pick up and Drop off details with a specific, or range of, Master Agent code(s) in the PCM Quote or PCM Package header matching the selection.

Currency

Used to select PCM with a particular currency.

PCM Status

By default, all PCM statuses are checked and services in PCM Quotes or PCM Packages that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all PCM branches are checked and services in PCMs that have those branches will be selected.

Department

By default all PCM Departments are checked, services in PCMs that have those branches will be selected.

If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes.

Service Analysis

The bottom two rows of this tab are the 6 Product (Service) Analysis codes. These are Product Analysis codes attached to the Service.

Analysis fields can be expanded or minimised by using the + or - function.

Bulk Service Insert

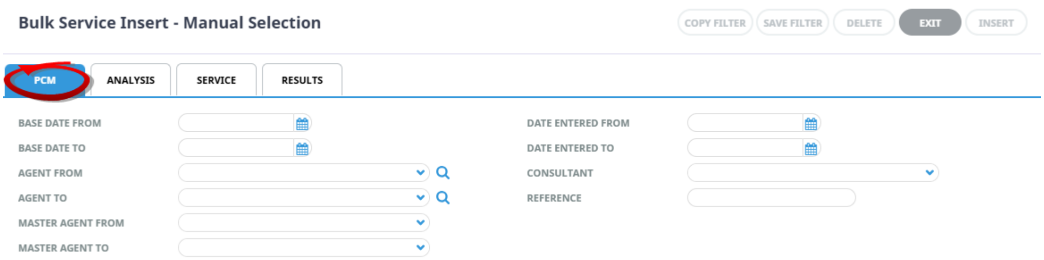
This feature allows users to insert a service into multiple PCMs using a bulk service insert process. Filters are applied to display a list of PCM results, allowing users to manage the insert of a service into selected PCMs.

Users can view standard product options and can select one product at a time to insert. The day sequence must be specified for the search, which will then be used to insert the service into each PCM based on the day number. When the "Add Service" operation is performed, it is inserted using the Day and Sequence number from the initial selection.

Bulk Service Insert

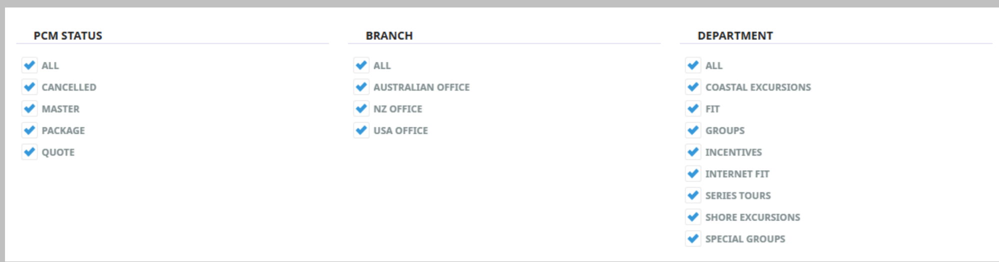
1. From the Home menu, select **Home > Operations > PCM Operations > Bulk Service Insert**.

2. On the blank **Bulk Service Insert - Manual Selection** screen, the **PCM Tab** opens. Complete the fields necessary to filter a list of PCM results. One filter selection is required from the following options; Base Date, Agent, Master Agent, Date Entered, by Consultant or Reference.



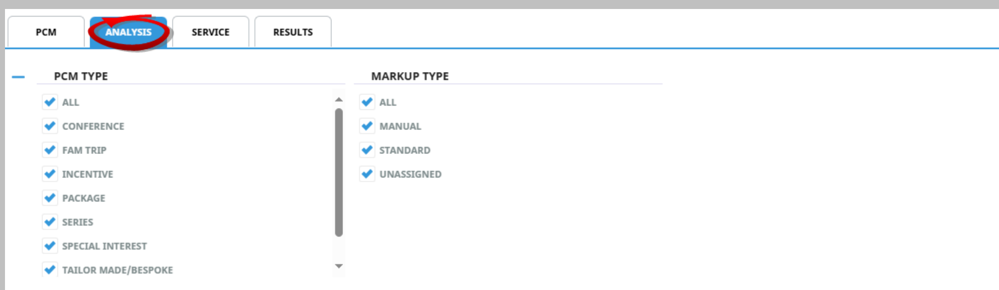
3. Keeping with the **PCM Tab**, PCMs can be filtered by 'PCM Status', 'Branch' and or 'Department'. If applicable, select the required filters.

> Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.

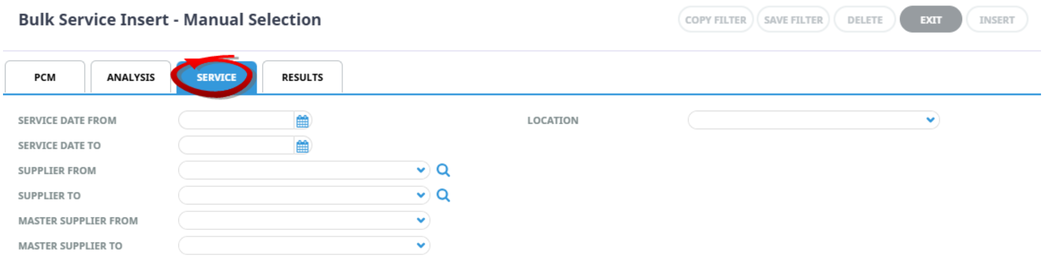


4. Click on the **Analysis Tab**, selection of current PCMs can also be made from 6 of the PCM Analysis Codes. If required select the applicable 'Analysis Codes'.

> Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



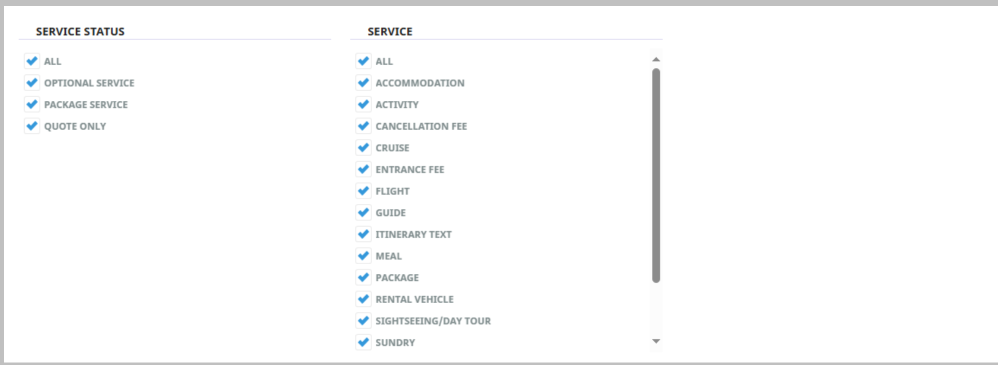
5. Click on the **Service Tab** , select a *Service Date From/To*, *Supplier*, *Master Supplier*, or *Location* to filter PCMs with specific Services.



6. Keeping with the **Service Tab**, PCMs can be filtered using *Service Status*, *Service Type*.

Service Tab

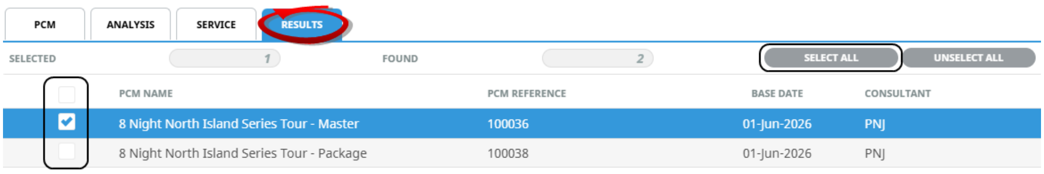
Filters used in this screen capture are examples used for Training purposes, Service Status, Service Type selection will reflect users own organisational fields.



7. Check the **completed screens**.

8. Click on the **Results Tab**. Select the PCMs using the 'Selected check boxes' next to each PCM, or use 'Select All'.

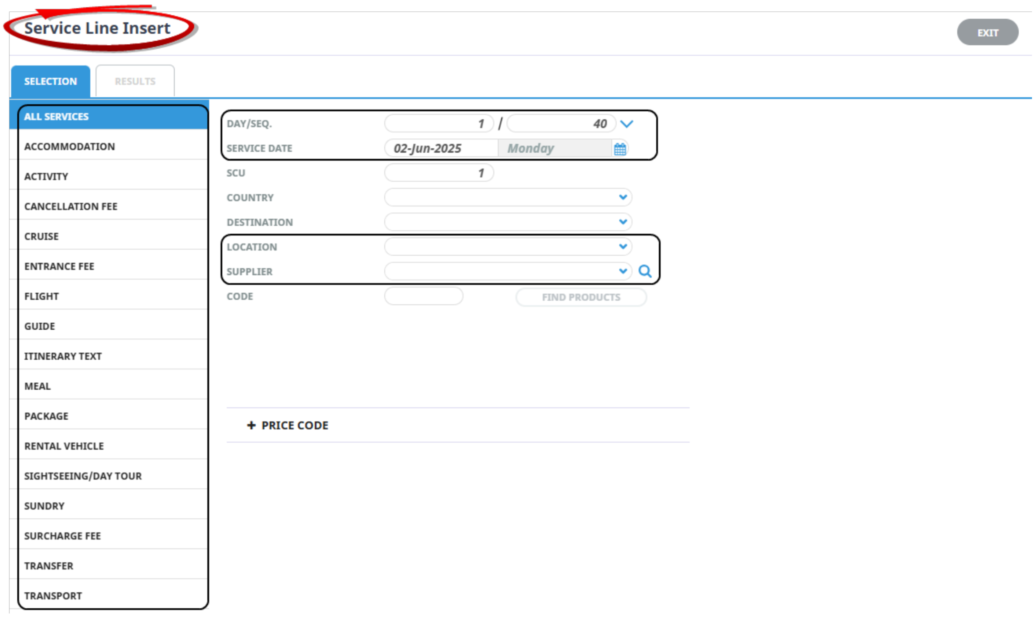
   NOTE: The Insert Button will become active when PCMs are selected.



9. Click **Insert** to add a new entry.

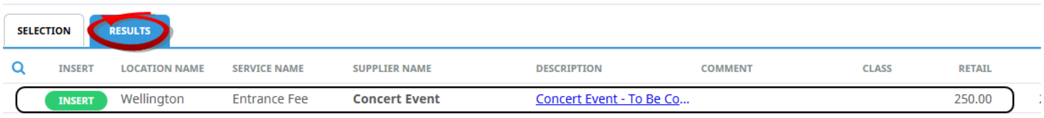
10. On the blank **Service Line Insert** screen, select a 'Location' or 'Supplier' and a 'Service Type' to search for Product.

   NOTE: To insert the service mid itinerary adjust the Day/Seq fields to show the correct values, the Service Date will update if Day/Seq fields are edited. If the Service Date is edited the Day/Seq will automatically update.



11. Click **Find Products**.

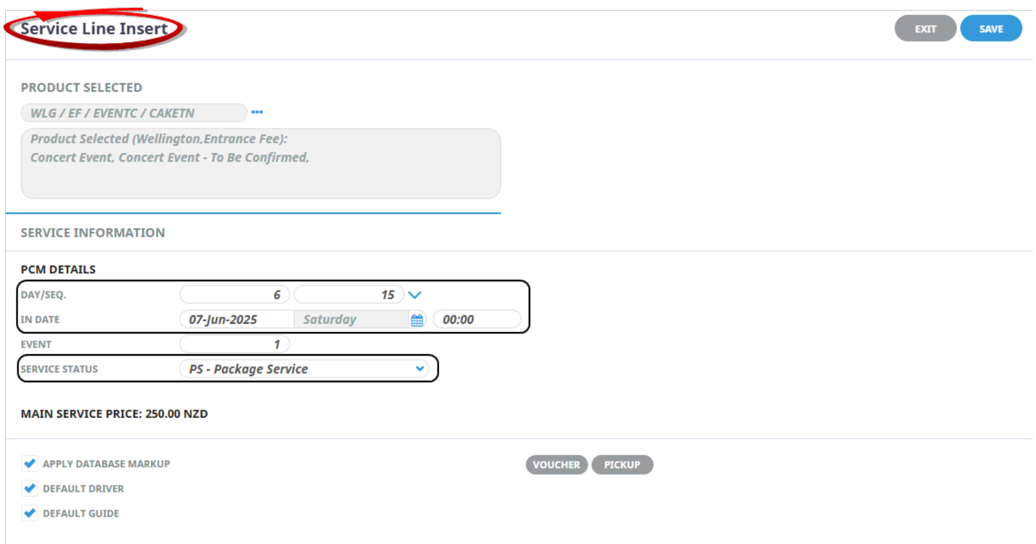
12. On the **Results tab**, select the service to insert into the PCM.



13. Click **Insert** to add a new entry.

14. The **Service Line Insert** screen opens with the Product Selected, check the PCM Details: *Day Sequence & Service Status*fields.

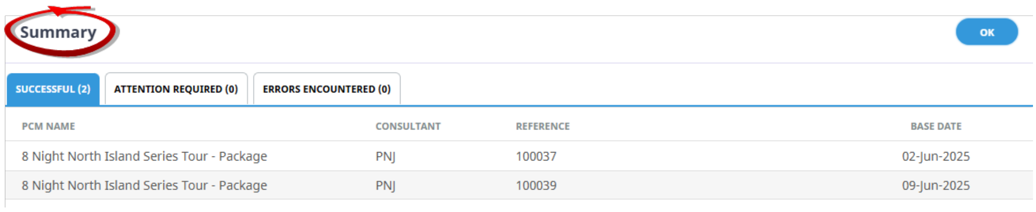
NOTE: If pickup and drop off details are known they can be edited here.



15. Click **Save** to keep the changes.

16. Click **Exit** to discard any changes.

17. If **Save** was selected a Summary will appear with the number of successful PCMs updated.



18. Click **OK** to exit the modal.
19. The Bulk Service Insert Results Tab will re-display select **Exit** to close.

About Bulk Service Insert Fields

There are some additional considerations with using a bulk service insert feature.

- Package, non-accommodation package products cannot be inserted into multiple PCMs.
- External Services are unable to display in the Insert Service Results screen and therefore cannot be inserted.
- If a product rate has a Split Service, Rate Category for cross seasonal quotes - the bulk service insert process will insert a single service for the entire stay length.
- Adding a service to a PCM already inserted into a booking, operates the same as adding a service manually to a PCM.

PCM Tab

This is the default tab that will open when selecting to insert a service within multiple PCMs in a bulk update process.

Base Date From/To

Base Date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCM with a specific date, or PCMs that fall within a range of base dates.

Agent From/To

Used to select PCMs with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Master Agent From/To

This selection is used to filter PCMs with a specific, or range of, Master Agent(s) codes in the PCM details screen matching the selection.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here, PCMs that were created within the date range provided will be display in the results screen.

Consultant

Selecting this field will filter PCMs by the consultant code attached to the PCM Quote or PCM Package.

Reference

Used to select a specific PCM reference.

PCM Status

By default, all PCM statuses are checked and PCM Quotes or PCM Packages that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all PCM branches are checked and PCM Quotes or PCM Packages that have those branches attached will be selected.

Department

By default all PCM Departments are checked, PCM Quotes or PCM Packages that have those branches attached will be selected.

If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab

PCM Analysis

The top two rows of this tab are the 6 PCM Analysis codes. These are PCM header level Analysis selections.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Service Tab

Service Date From/To

This is the date of the service within a PCM. If selection for a range of dates is entered here, PCMs with services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select PCMs with a specific, or range of, supplier(s) codes matching the selection.

Master Supplier From/To

This selection is used to find PCMs with a specific, or range of, Master Supplier(s) codes matching the selection.

Location

Find PCMs with services in the itinerary for the selected location.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Results Tab

Selected check boxes

PCMs can be individually selected.

Selected/Found Fields

These fields are non editable fields, which provide a tally of the results found, and the PCMs selected.

Select All/Unselect All

Select all PCMs found, or un-select all PCMs selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Bulk Service Insert (PCM), see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Service Line Insert

Insert Service Line Results

The Results tab shows a list of all products found that match the selection criteria. Products are presented in list form under the following columns.

NOTE: All scrollable lists can have columns added or removed per user (i.e. you can change the default columns that appear in your view of the list). Click on a space in between two column labels (if you click on the label itself, the scroll will re-sort based on the column clicked on). The list of available column names will display and they can be check-box selected/deselected. The width can also be set, as can normal or bold font.

Filter Button

The results tab provides users with an additional filter option, products and services can be filtered by class, locality or attached amenities.

NOTE: *This is dependant on if user company's procedures have selected to use these fields in their product setup*.

Consultants can also define a rate price range for results to return based on minimum and maximum agent values.

Search Icon 

There is a search icon located next to the column 'Book' heading. This allows users to quickly search the Product Search application for an existing entry. An additional search field will enable users to insert text to search, and previous and next (arrow buttons) identify entries which match the search criteria.

The Enter key can be used as a quick key to move to the next matched searched result.

Insert

A button labelled Insert allows the service to be inserted into the selected bookings or PCMs.

Location Name

Full name of the location where the service is provided.

Service Name

Full name of the service (from the Selection tab under *All Services*).

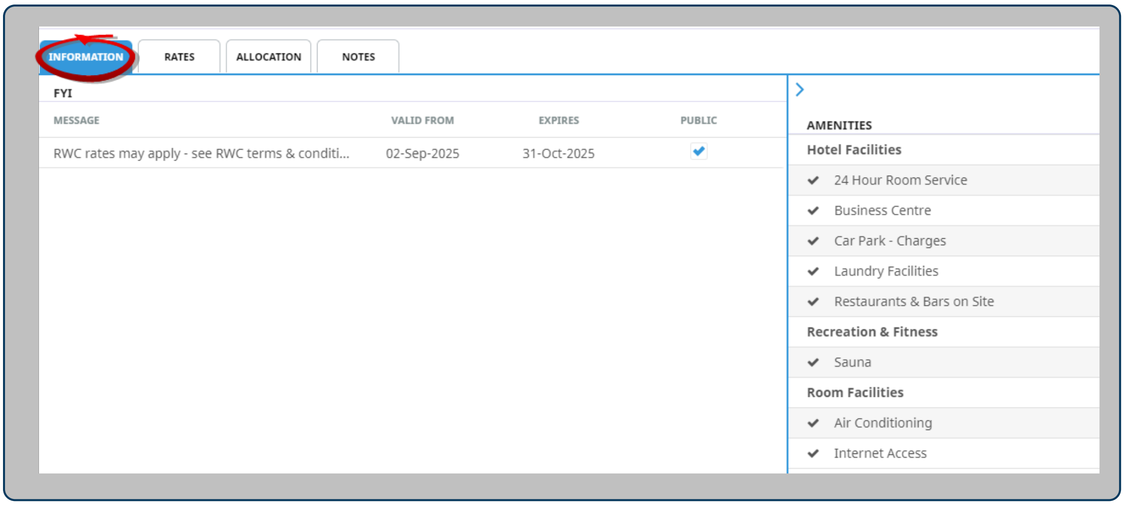
Name

Full name of the service supplier.

Description

A drill-down link to further information about the service, including *Rates* and *Notes*. Book and Hold buttons are also available on the drill-down screen (albeit coloured blue, rather than green and grey).

This example shows a property that has FYI message information, and shows the amenities available at the property. Clicking on the other tabs within this screen will allow users to see further detail.



Comment

A further field that is sometimes used as an extra descriptive field for product, or for an internal note. An example could be for accommodation services, where this organisation uses the comment field to show meal inclusions - Includes light continental breakfast.

Class

For accommodation services, this label identifies the class of accommodation; e.g. 4-Star, 5-Star, Backpackers, Luxury Boutique etc.

Sell

The cost price in the Product Database, plus markups (regardless of source), less agent commission.

NOTE: It is possible that the same product displays multiple times. This is because of INI settings that determine what is to display by default. Where the same product is displayed multiple times, it is once for each price code that has been set up against the date range for the product.

"Booked" is not Saved

It is important to remember that, when viewing a list of results (or any aspect of a service within these tabs), the service has *not yet been inserted into the , even if **"Book"** has been clicked*. The tabs are available to refine selections and to inquire on various aspects of a service. Services are not saved into the until the Insert New Service process is complete, which requires each service

A full list of field columns available within the Results tab is available Service Line Insert (Service Scroll Headings).

Summary

A summary of the PCM Bulk Service Insert process is displayed to inform users of successful service insertion. Additional tabs highlight PCMs that require further attention to add a new service or indicate if an error has occurred.

Summary Modal displays three tabs:

- **Successful** - where the total number of processed PCMs is displayed in the bottom left corner of the Modal. The number of PCM successfully updated displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, and Base Date.
- **Attention Required** - where the number of PCMs requiring attention displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, Base Date, Rate Status, and a Message column indicating the attention which is required. For example: Rates have expired, a cross season rate, a sequence number changed.
- **Errors Encountered** - where the number of PCMs which encountered errors displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, Base Date, Rate Status, and a Message column indicating the error.

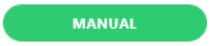
Save Bulk Service Insert Filters

Common or frequently used Bulk Service Insert Filters can be saved and given a Description so that repeatable tasks are easily accomplished.

Bulk Service Insert

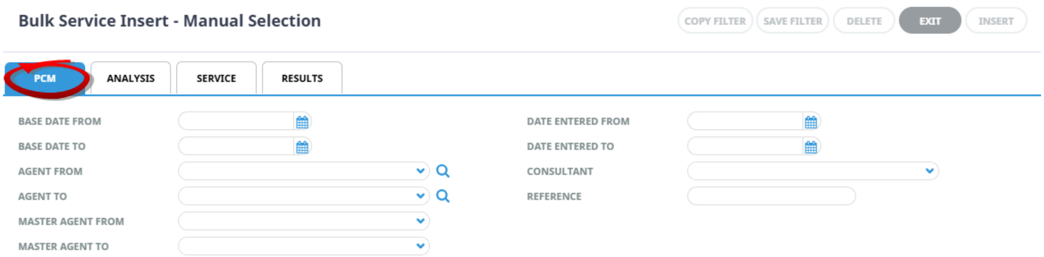
1. From the Home menu, select **Home > Operations > PCM Operations > Bulk Service Insert**.

2. Click **Manual.**



3. On the blank Bulk Service Insert - Manual Selection screen, the **PCM Tab** will open, select the required filters from the field selections, and tabs available.

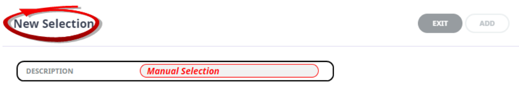
   View "About Bulk Service Insert Fields" on page 221 to learn more about all field selections available, or view the individual tab filters; " PCM Tab" on page 221, "Analysis Tab" on page 222 (PCM), "Service Tab" on page 222, or " Results Tab" on page 222.



4. Check the **completed screens**.
5. Click on the **Results Tab**.

6. If you want to save this filter, click **Save Filter**.

7. On the empty **New Selection** screen, give the Saved Filter Selections a 'Description'.



8. Click **Add** to add this filter description.

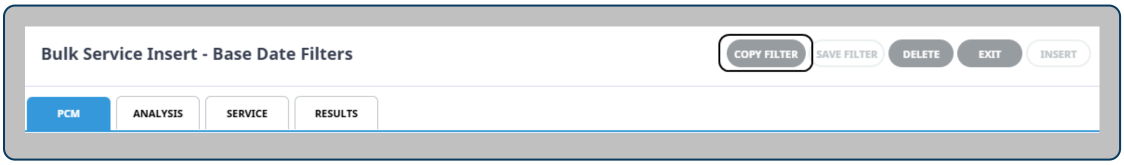
9. Click **Exit** to discard any changes.
10. NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Service Insert. If selected for future Bulk Service Insert processing, results will be returned based on the saved filters.

> The procedures just described are sufficient to create manual filter criteria to manage Bulk Service Insert features - saving filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the System Setup User Manual.

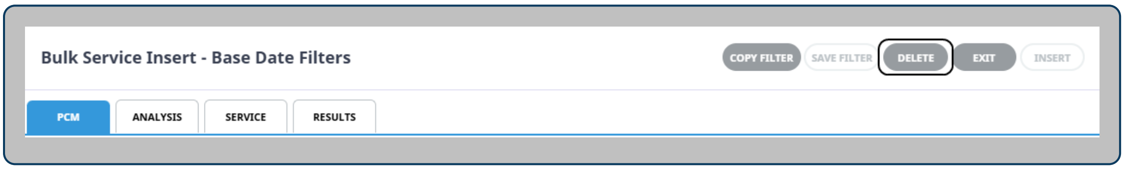
Copy Bulk Service Insert Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the PCM Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Bulk Service Insert Filters

Deletion of Filter Descriptions is allowed, to be able to manage currency of tasks and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to **Delete**, the filters will not be able to be retrieved again.



PCM Status Update

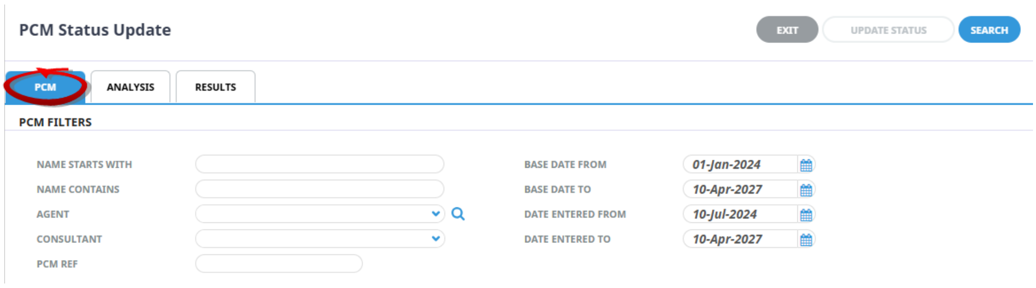
There may be situations that you will need to do a bulk update of PCM Status.

Multiple PCMs are selected, and updated in bulk. The procedure below describes how to update multiple PCM Statues.

Bulk Update PCM Status

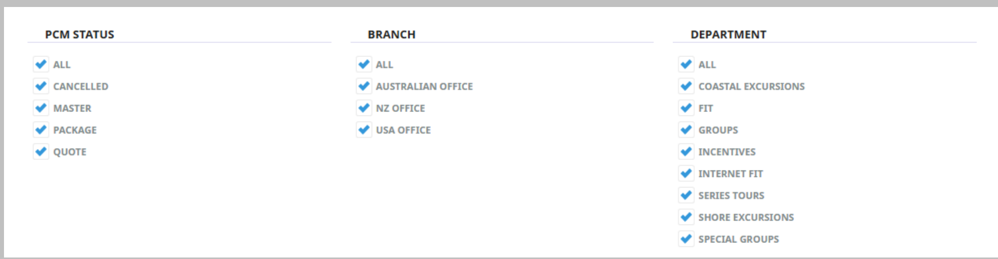
1. From the Home menu, select **Home > Operations > PCM Operations > PCM Status Update**.

2. On the blank **PCM Status Update** screen, the **PCM Tab** will open, Complete the necessary fields in 'PCM Filters' section. You can amend the Base Date From/To, and Date Entered From/To fields to display results for a range of dates.



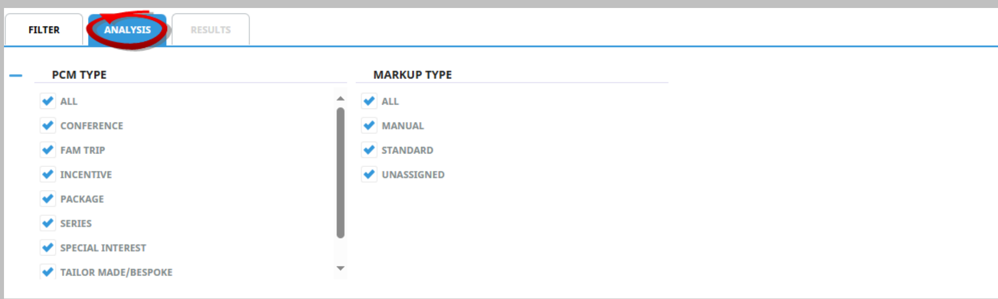
3. Keeping with the **PCM Tab**, PCMs can be filtered using 'PCM Status', 'Service Status', 'Branch' and or 'Department'. If applicable, select the required filters.

Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.



4. Click on the **Analysis Tab**, selection of PCMs can also be made from 6 of the PCM Analysis Codes. If required select the applicable 'Analysis Codes'.

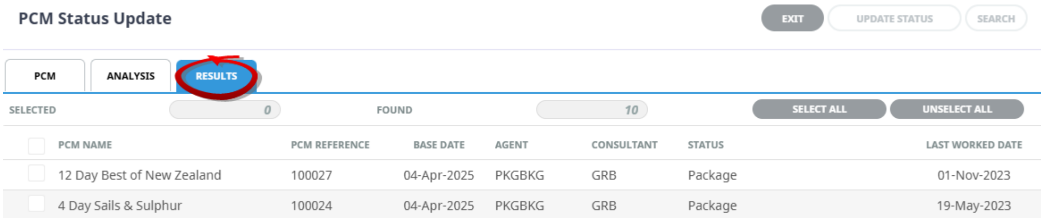
Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



5. Check the **completed screens**.

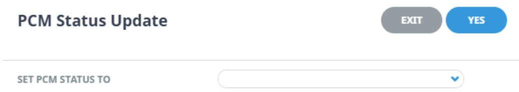
6. Click on the **Results Tab**. Select the PCMs using the 'Select check boxes' next to each PCM, or use 'Select All'.

   NOTE: The Update Status button will become active when PCMs are selected.



7. To change the status, click **Update Status**.

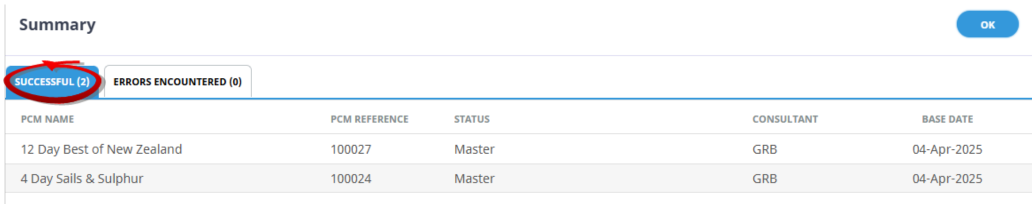
8. On the blank **PCM Status Update** screen, select the new Status to set the PCM Status to.



9. To keep the changes, click **Yes**.

10. Click **Exit** to discard any changes.

11. If **Yes** was selected a Summary will appear with the number of successful PCMs to be updated.



12. Click **OK** to exit the modal.
13. The PCM Status Update Results Tab will re-display select **Exit** to close.

About PCM Status Update Fields

Name Starts With

This field will be empty, if the PCM name is known, you can enter it here.

Name Contains

As with Name Starts With, this field will be empty, This is a string search facility, i.e. it will find PCMs matching any combination of consecutive characters entered in the field, regardless of where in the PCM name the string occurs.

Agent

Selecting an agent will limit the filter results to only PCMs for that agent.

Consultant

Selecting a consultant code and consultant name will limit the results to PCMs for that consultant.

PCM Ref

Used to select a specific PCM Reference.

Base Date From/To

Base Date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCMs with a specific date or fall within a range of Base Dates.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here Pick up and Drop off details for PCMs that were created within the date range provided will display in the results screen.

PCM Status

By default, all PCM statuses are checked, PCMs can be filtered by selecting / deselecting the required PCM status code in the Multi Select List box. Un-check statuses that are not required.

Branch

By default, all PCM Branches are checked, if only PCMs with specific Branch(s) need to have the PCM Status Updated, check the appropriate box(es).

Department

By default, all PCM Departments are checked, if only PCM's with specific Department(s) need to have the PCM Status Updated, check the appropriate box(es).

If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab (PCM Analysis)

PCM Analysis

The rows on this tab are the 6 PCM Analysis codes.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected check boxes

PCMs can be individually selected.

Select All/Unselect All

Select all PCM's found, or un-select all PCM's selected.

Selected

The cell to the right of this heading will provide you with the number of PCMs that have been selected.

Found

The system will provide you with the number of PCMs found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Summary

A summary of the PCMs processed is displayed to inform users of successful Status Updates. Additional tabs highlight PCMs that require further attention to update their status or indicate if an error has occurred.

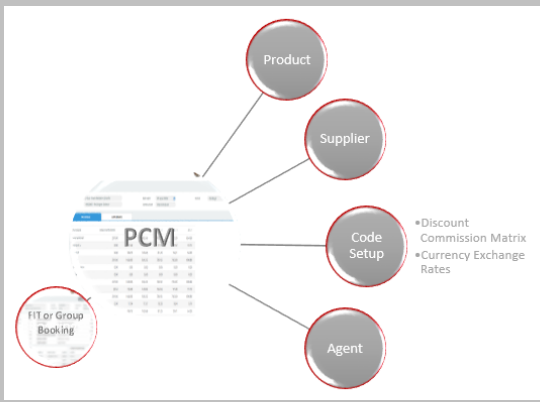
Summary Modal displays three tabs:

- **Successful** - where the total number of processed PCMs is displayed in the bottom left corner of the Modal. The number of PCM successfully updated displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, and Base Date.
- **Errors Encountered** - where the number of PCMs which encountered errors displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, Base Date, Rate Status, and a Message column indicating the error.

Recalculate All PCM Quotes

Recalculation of PCM Quotes or PCM Packages can occur in bulk instead of quotation by quotation, package by package, selection of different fields will determine the quotations/and or packages to be recalculated.

If changes are made to any of the applications noted below, the PCMs selected would be recalculated to reflect the change.



Once a recalculation has occurred to a PCM, users can choose to recalculate their bookings where the PCM has been used. Although this would need to be done in the Recalculate All Bookings function or within the individual FIT or Group Booking.

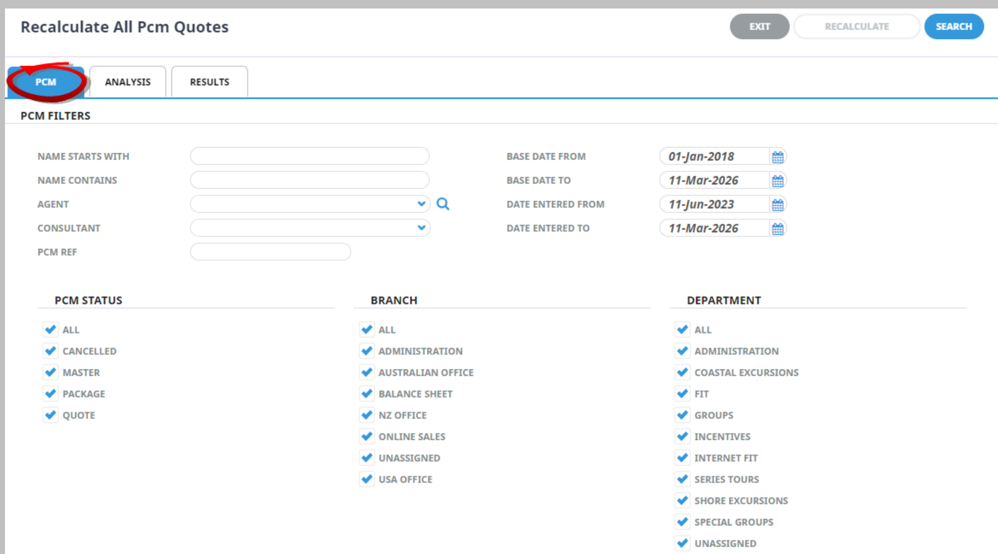
Recalculate All PCM Quotes

1. From the Home menu, select **Home > Operations > PCM Operations > Recalculate PCM Quotes**.

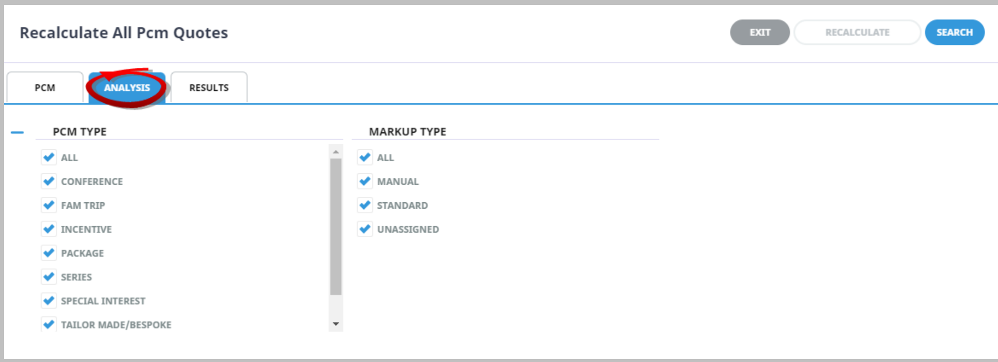
2. On the blank **Recalculate All PCM Quotes** screen, the **PCM Tab** will open, select the required filters from the field selections available within the **PCM Tab**,and the **Analysis Tab**. Click on the links to find out more about the fields PCM Tab, Analysis Tab.

   NOTE: *Base Date From/To*, and *Date Entered From/To* fields are defaulted to system settings, these fields can be amended to suit recalculation requirements.

   Filters used in this screen capture are examples used for Training purposes. PCM Statuses will reflect users own organisational fields.

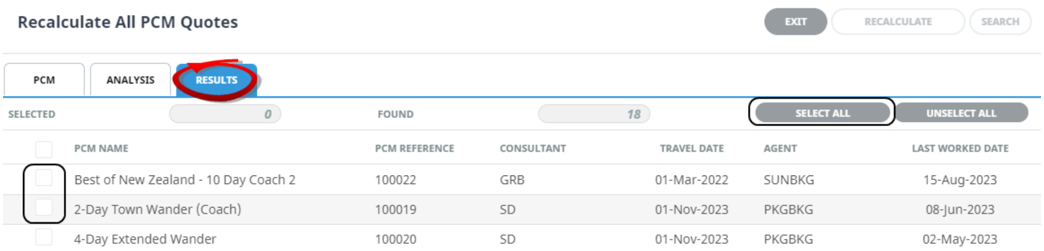


Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.



3. Check the **completed screens**.

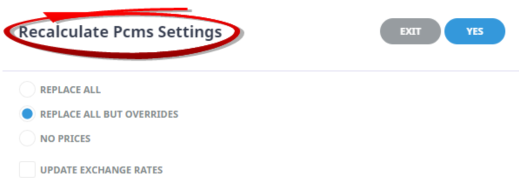
4. Click on the **Results Tab**. Select the PCM Quotes or Packages using *Select* check-boxes next to each service, or use *Select All*.
   Click on the link to find out more about the fields Results fields.



5. If you want to recalculate, click **Recalculate**.

6. On the **Recalculate PCMs Settings** screen, check the required setting, and select if you want the system to update the exchange rates. Click on the link to find out more about the Recalculate settings.

   NOTE: The system will default to *Replace All But Overrides*.



7. To keep the changes, click **Yes**.

8. Click **Exit** to discard any changes.

9. If **Yes** was selected a **Recalculate Summary** will appear with the number of successful PCMs processed.

10. Click **OK** to exit the modal.

About Recalculate PCM Quotes Fields

PCM Tab

This screen is in two sections. The top section includes 'PCM' filter selection. The bottom section includes selection for PCM Status, Branch or Department.

Name Starts With

This field will be empty. If the PCM name is known, enter the name here.

Name Contains

As with Name Starts With, this field will be empty. This is a string search facility, i.e. it will find PCMs matching any combination of consecutive characters entered in the field, regardless of where in the PCM name the string occurs.

Agent

Used to select PCMs with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Consultant

Selecting a consultant code and consultant name, will filter PCMs by the consultant code attached to the PCM Quote or PCM Package.

PCM Ref

Used to select a specific PCM reference.

Base Date From/To

Base date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCMs with a specific base date, or PCMs that fall within a range of base dates.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here, PCMs that were created within the date range provided will display in the results screen.

PCM Status

By default, all PCM statuses are checked and PCM Quotes or PCM Packages that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch/Department

If Branch and Department fields are used for PCMs, a list of available checkboxes will be visible to filter PCM Quotes by Branch and/or Department.

Analysis Tab (PCM Analysis)

PCM Analysis

The rows on this tab are the 6 PCM Analysis codes.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected check boxes

PCMs can be individually selected.

Select All/Unselect All

Select all PCM's found, or un-select all PCM's selected.

Selected

The cell to the right of this heading will provide you with the number of PCMs that have been selected.

Found

The system will provide you with the number of PCMs found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see "About Changing Default Column Headings" on page 248.

To view the available column headings in Recalculate All PCM Quotes, see "Booking Operations" on page 248.

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Recalculate PCM Settings

Replace All

Revisits the Tourplan Product Rates and re-costs all services within the PCM.

All Except Overrides

Revisits the Tourplan Product Rates however does not re-cost services where the original product rates were manually overridden. Manually overridden values need to be confirmed with 'OK'.

No Prices

Recalculates the totals based on the existing service line values within the PCM.

Update Exchange Rates

When the PCM services are re-costed should Tourplan continue to use the previous exchange rates (unchecked) or use the exchange rates from the Tourplan Code Setup Module.

CHAPTER 6

Pax CRM

Traditionally a CRM space is used to store additional details for your passengers travelling, information such as loyalty programs, passport details even credit card details can be entered at the time of booking and will be stored in the Pax CRM.

The Pax CRM application also allows storage for details of clients who may not have made a booking, instead they may have requested brochures or made an enquiry allowing you to store their contact information too.

This application allows organisations to quickly access client personal and profile details for those passengers who have previously travelled, and keep records current in a central database instead of storing the information within individual bookings.

In this chapter ...

Insert New Pax

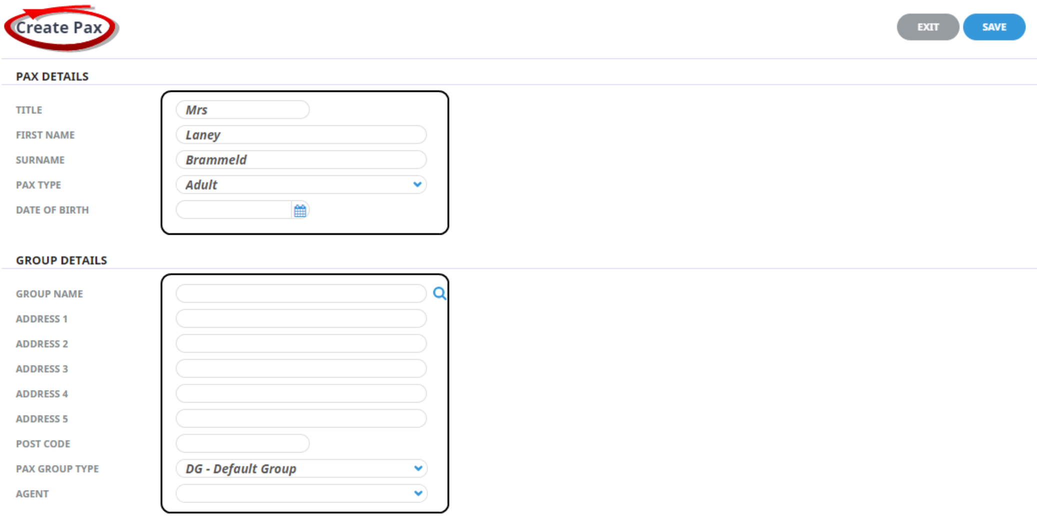
Inserting a new passenger record from within the CRM application allows you to store data on clients who may not be travelling. You may have had a phone enquiry or have taken client details from a trade show.

You can record their details here until such time that they make a booking.

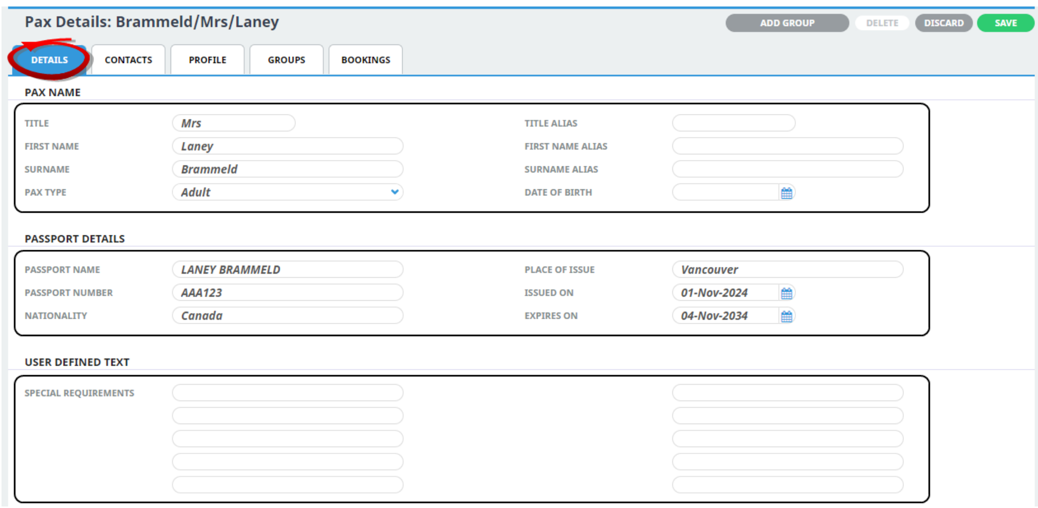
Insert New Client into the CRM

1. Select **Menu Home > Operations > Pax CRM**.
2. Click **Insert Pax**.

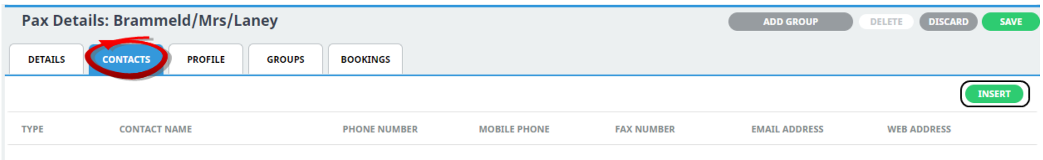
3. On the **Create Pax** screen enter the pax details and if the passenger belongs to a group of travellers enter known details.



4. Click **Save** to keep the changes.
5. The **Details Tab** will open where the pax full name, alias and date of birth can be noted on the upper section of the screen. The middle section allows storage of passport details and contact information specific to this passenger, with the lower section of the screen allowing any information defined by your organisation to be entered for the passenger.



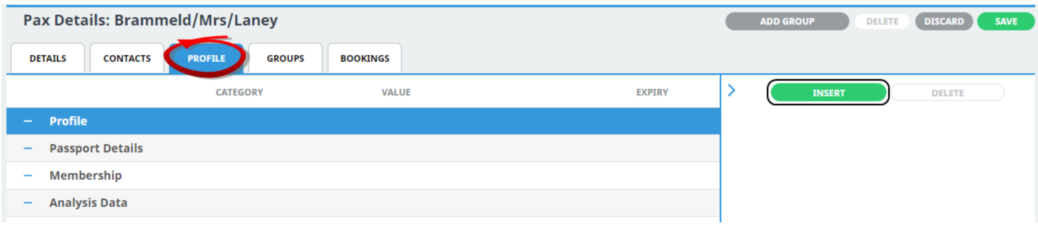
6. Adding contact details for this passenger is done in the **Contacts Tab**. Select **Insert**, and complete the Insert Pax Travelling Contact Form with the details you have on hand.



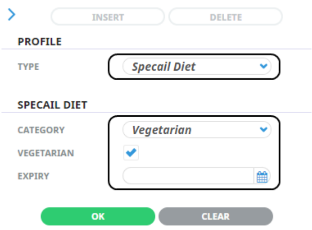
   a. Click **Save** to keep the changes.

   b. Click **Exit** to discard any changes.

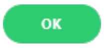
7. Unique passenger profile entries are available from the **Profile Tab**. This is where organisations may choose to store visa information, loyalty membership numbers or special requirements.
To insert a profile entry, highlight the profile heading on the left and select **Insert**.



8. Select the **Profile Type, and the Category**.



9. If you want to keep the changes, click **OK**.



10. To keep the changes, click **Save**.

11. Click **Discard** to discard all changes.

12. Click **Exit** to discard any changes.

About the Details Tab

Pax Name

The Pax name fields should follow your naming conventions when inserting booking names. These fields will eventually be used within bookings and using the correct naming convention now will save you time in the long run.

Pax Type

This drop-down section is used to assign a type to the individual pax names being entered. Pax types available:

- Adult (Default)
- Child

- Infant

Title Alias, First Name Alias, Surname Alias

The alias fields allow passenger name variations typically used to save alternative language text for a passengers name. They also provide for alternative language searching for passenger details so should follow your standard naming conventions for aliases.

Date of Birth

- If the product database has had Age Policies completed, then the date of birth of children and infants can be entered into the 'Date of Birth' field. Tourplan will calculate the age(s) of children/infants based on the date of birth vs the date of service in the booking and apply Adult or Child costing automatically, depending on the age of the child/infant at the time.
- If adult dates of birth are being entered, check that the DOB is not a date prior to the years from/to as defined in Windows Control Panel Regional Settings. By default, Windows interprets 2 digit years as being between 1930 and 2039. If a DOB is entered which is prior to 1939, it is calculated as 100 years later; e.g. 1937 is calculated as 2037.

Passport Details

These six fields allow passport information to be stored against each passenger (including children). The information inserted here can display on messages and documentation if the message templates use the correct substitution codes.

Passport Details include:

- Passport Name - Full name of passenger as seen in their passport.
- Passport Number - Passengers passport number.
- Nationality - Nationality of Passenger as seen in their passport.
- Place of Issue - Place of passport issue.
- Issued/Expires On - Issue and Expiry date of passport (Calendar selection or format dd/mm/yy the system will amend the manually entered date to dd-mmm-yyyy).

User Defined Text

These ten fields are unique to your organisation requirements and must first be setup in System Setup User Manual.

About the Pax Travelling Contact Fields

Contact Type

The type of contact.

Examples are: BU-Business HM-Home. These must first be set up in System Setup User Manual.

NOTE: Contact Types can be used multiple times in this screen - e.g., there can be more than one contact with a Contact Type of 'BU' (Business), provided the Contact Name is different for each contact.

Contact Name

The name of the contact.

Phone Number

The phone number for this contact.

Mobile Phone Number

The mobile phone number for this contact.

Fax Number

The fax number for this contact.

Email Address

The email address for this contact.

Web Address

The web address for the contact.

Recording Profile Information

Profile information could include Special Diets, Passport Information, noting Membership numbers such as Frequent Flyer membership, and or specific Analysis Data.

About the Pax Profile Fields

Profile Type

The Profile Types available on screen are unique to your organisation and have been configured in System Setup User Manual.

Profile Category

As with Profile Types, the Profile Categories have been pre-set in system setup. These drop-down fields are unique to your organisations requirements. See System Setup User Manual.

Expiry

Some fields such as loyalty programs or visa details will need to store expiry date information. If there is no expiry for your Profile Entry Type this date field can be left empty.

Search For Existing Pax

The Pax CRM stores each customer name with their unique ID number. Individual passengers can be linked to group names. Pax search - enables results for existing passenger records using various filter criteria. Once located, passenger details can be edited or deleted.

This procedure identifies the steps required to find an existing passenger.

There are two options when searching for existing passengers.

1. The first is if you know surname of the passenger, and list of passengers matching the searched name will return. The forename field will enable if the surname field is not empty.
2. The second is a more advance search offering a filtered selection based on contact details or a range of pax name options.

Find existing passenger in the CRM

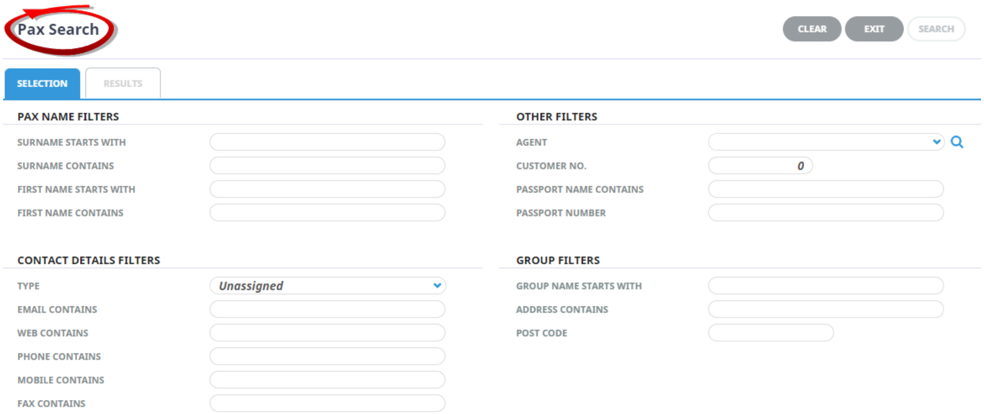
1. Select **Menu Home > Operations > Pax CRM**.
2. Search for the Passenger either by.

   a. Entering the Surname or First Name of the passenger and select **search**.

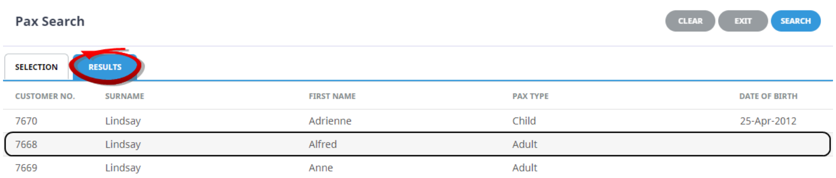
   b. Or if the passenger name is unknown select **search** to enter more advance filters for searching.

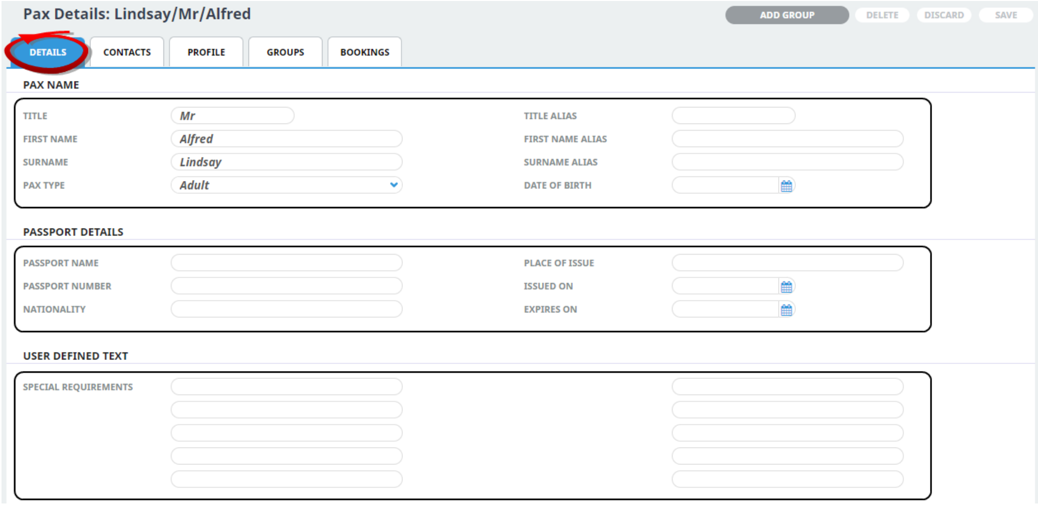
   

   c. Click **Search**.

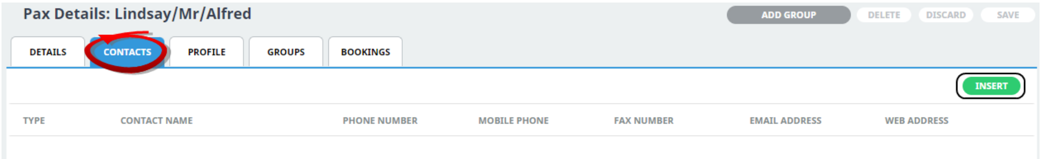
3. A full list of passenger names matching your search will return, click on the **name of the passenger** to view their entered details.



4. View passenger records from the **Details Tab** where the pax full name, alias and date of birth can be noted on the upper section of the screen. The middle section allows storage of passport details and contact information specific to this passenger, with the lower section of the screen allowing any information defined by your organisation, e.g. Special Requirements, to be entered for the passenger.



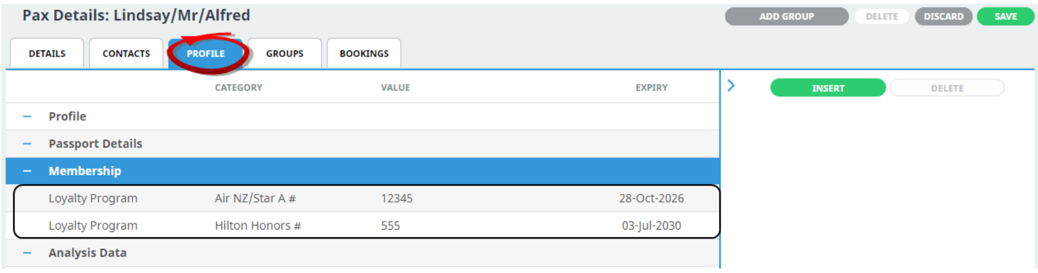
5. Adding contact details for this passenger is done in the **Contacts Tab**. Select **Insert**, and complete the Insert Pax Travelling Contact Form with the details you have on hand.



   a. Click **Save** to keep the changes.

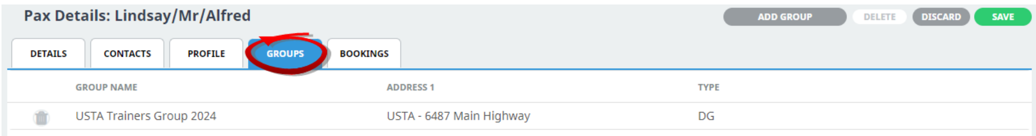
   b. Click **Exit** to discard any changes.

6. Unique passenger profile entries are available from the **Profile Tab**. This is where organisations may choose to store visa information, loyalty membership numbers or special requirements. The setup of these headings is detailed in the System Setup User Manual.

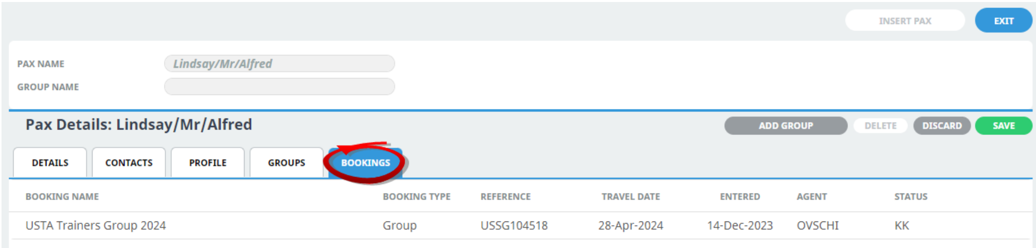


You can see in this example that Mr Alfred Lindsay is a member of two loyalty programs (Air NZ and Hilton Honors and his loyalty numbers and expiry dates have been recorded for both).

7. The **Groups Tab** provides the ability to view if the passenger is linked in a group of travellers.



8. A list of bookings the passenger has previously been named in can be viewed or selected from the **Booking Tab**.



9. To keep the changes, click **Save**.

10. Click **Discard** to discard all changes.

11. Click **Exit** to discard any changes.

About the Pax CRM Fields

Pax Name - Surname

The last name (surname) of the passenger.

Pax Name - First Name

The first name (Christian name or forename) of the passenger. This field will be available if the Pax Surname is entered.

Group Name

The name of a group passengers.

About the Pax Search Fields

> » The capitalisation or case is irrelevant in the Booking header search; 'BROW' will return the same results as 'brow'.

Surname Starts With

This field will be empty. Enter a search string - search is done on the Booking name beginning with the entered search string.

Surname Contains

As with Surname Starts With, this field will be empty. This is a string search facility; i.e. it will find Bookings matching any combination of consecutive characters entered in the field, regardless of where in the Booking name the string occurs.

First Name Starts With

This field will be empty. Enter a search string - search is done on the Booking name beginning with the entered search string.

First Name Contains

As with First Name Starts With, this field will be empty. This is a string search facility; i.e. it will find Bookings matching any combination of consecutive characters entered in the field, regardless of where in the Booking name the string occurs.

Agent

Selecting an agent will limit the search to only Bookings for that agent.

Customer Number

Specifying the unique customer number will limit the search to bookings with the specific reference.

Passport Name Contains

Entering a Passport Name will limit the search to Bookings and return results based on the Passport Name Contains entry.

Passport Number

Specifying the a passport number, (if known and entered against the passenger profile in a booking) will limit the search to bookings with the specific passport number selected.

Contact Details Filter

Specific contact details can return results based on an email address or a phone number. This is a handy tool if you do not have the clients name on hand.

Group Filters

Group Name starts with allows you to search for passengers who were included in a particular group of travellers.

Group Search

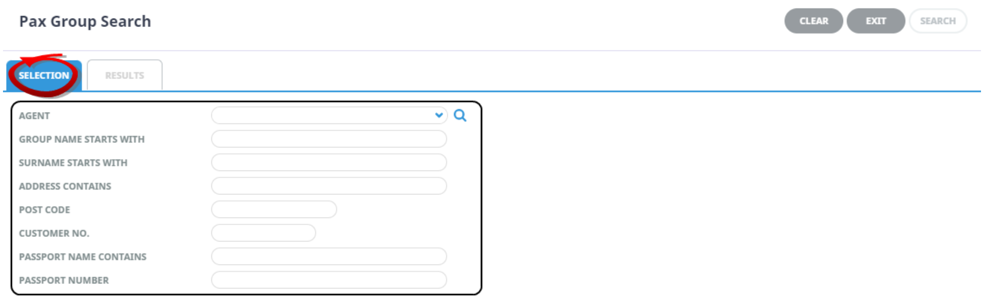
The Pax CRM is a stand alone application which can be found in the Operations Menu. You will require the correct security settings to be able to gain access to this application. The Pax CRM stores each customer name with their unique ID number.

Searching by group enables users to search for CRM Group details and names associated with that group. Once located individual details can be edited or deleted.

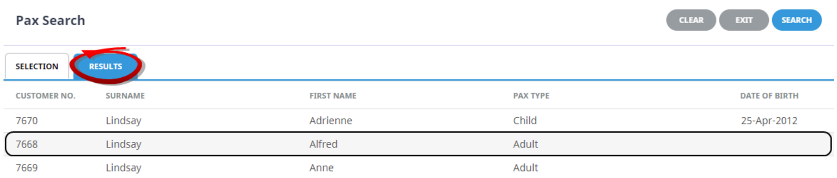
NOTE: The term "Group" used here should not be confused with the same word used in Group Bookings. In the CRM context it is a 'title' that relates pax names - i.e. all Pax in one booking are Grouped under. By default, in FITs and Groups the booking name is used as the Group Name, but it can be edited.

Find existing passenger in the CRM

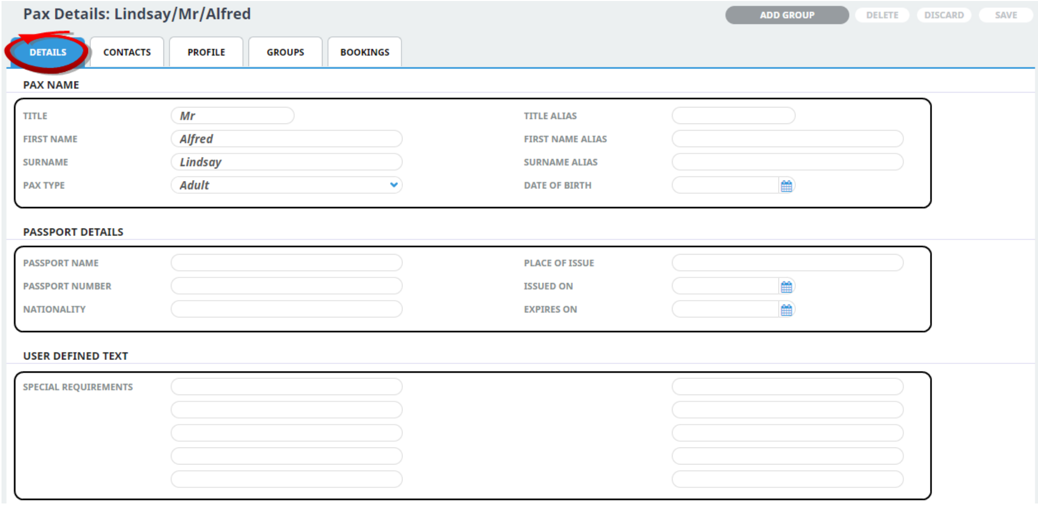
1. Select **Menu Home > Operations > Pax CRM**.
2. Search for the Passenger either by Group.
   a. Entering the Group Name and select **search**.
   b. Or if the group name is unknown select **search** to enter more advance filters for searching.



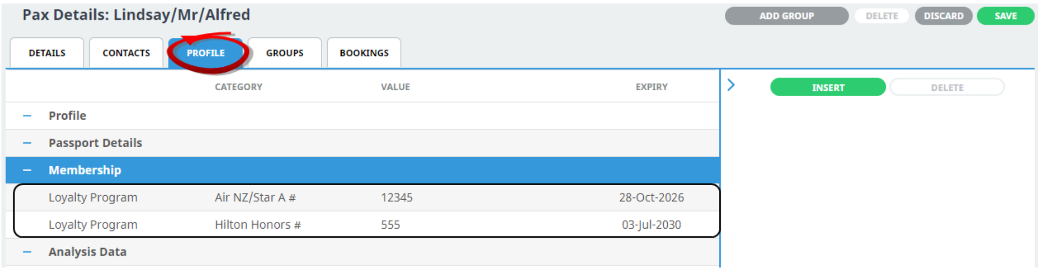
   c. Click **Search**.
3. A full list of passenger names matching your search will return, click on the **name of the passenger** to view their entered details.



4. View passenger records from the **Details Tab** where the pax full name, alias and date of birth can be noted on the upper section of the screen. The middle section allows storage of passport details and contact information specific to this passenger, with the lower section of the screen allowing any information defined by your organisation, e.g. Special Requirements, to be entered for the passenger.

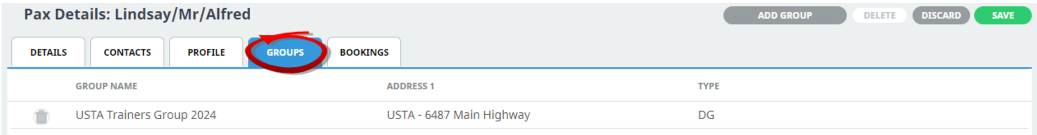


5. Unique passenger profile entries are available from the **Profile Tab**. This is where organisations may choose to store visa information, loyalty membership numbers or special requirements. The setup of these headings is detailed in the System Setup User Manual.

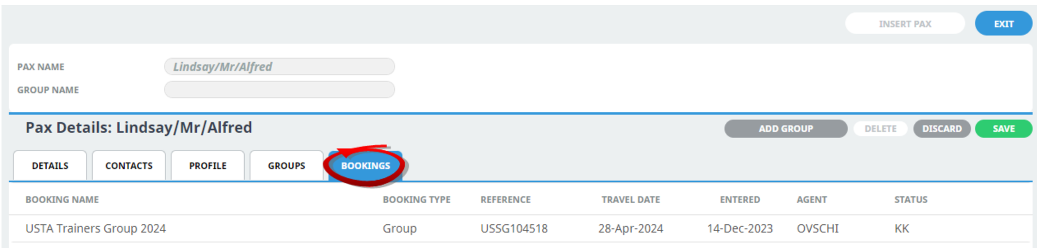


You can see in this example that Mr Alfred Lindsay is a member of two loyalty programs (Air NZ and Hilton Honors and his loyalty numbers and expiry dates have been recorded for both).

6. The **Groups Tab** provides the ability to view if the passenger is linked in a group of travellers.



7. A list of bookings the passenger has previously been named in can be viewed or selected from the **Booking Tab**.



8. To keep the changes, click **Save**.

9. Click **Discard** to discard all changes.

10. Click **Exit** to discard any changes.

About the Pax CRM Fields

Pax Name - Surname

The last name (surname) of the passenger.

Pax Name - First Name

The first name (Christian name or forename) of the passenger.

Group Name

The name of a group passengers - Enter the first few characters of a Group name (if known) and click the search icon.

About the Group Advance Search Fields

NOTE: When entering selection filters, remember that the more filters entered, then a) the less data will be returned and b) the possibility of error is greater. For example, if all 8 selection fields have a value entered, and there is a spelling or numerical error in one of them, nothing will be returned.

Agent

Clicking the dropdown arrow will display a list of Agents Names in alphabetical order. Clicking in the blank Agent field and typing the first letter of the agent name, will scroll from that point. Clicking the search icon will display a further search screen, this allows users to search for added detail relating to the agent such as; Language; IATA Code; Master Agent details; or Analysis Codes.

Group Name Starts With

Enter the first few characters of a Group name (if known) and click the search icon.

Surname Starts With

Enter the first few characters of the Surname (last name - if known) and click the search icon.

Address Contains

Enter a word or letters that may be in any of the Group address detail field.

Postcode

Enter the Group Address Postcode (if known). The postcode must be complete - e.g. '805' will not locate '8052'.

Customer Number

This field refers to an internal system generated number and is used principally by Tourplan support staff.

Passport Name Contains

Enter a name of letters that may be in the Pax Passport Name Field.

NOTE: This field cannot be searched on in isolation - there must be search parameters in at least one of Agent or Group Name, Pax Name, Customer Number or Passport Number.

Passport Number

Specifying the a passport number that is in the Pax Passport Number Field.

APPENDIX

Supporting Information

The appendix includes reference material and supporting information that supplements this document's chapters.

In this chapter ...

About Changing Default Column Headings

Change Default Column Headings

1. Click anywhere in the white space of a list's column headings.
2. On the **Set Column Defaults** screen, click a column heading label in the Available Columns list.

   The button will become live. Click the and the column name will move to the Table Columns List. Use the and buttons to move the column names into the required order. To remove a column from the Table Column list, highlight it and click the to return it to the Available Columns List.
3. The check boxes can be used to make a column bold. The width of columns can be adjusted in the Width column.

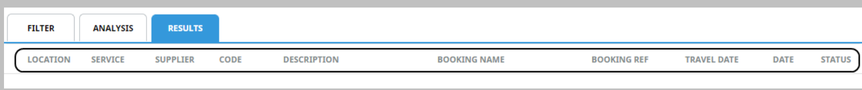
4. Click **Save** to keep the changes.
5. The list is immediately updated to reflect the new defaults chosen.

Booking Operations

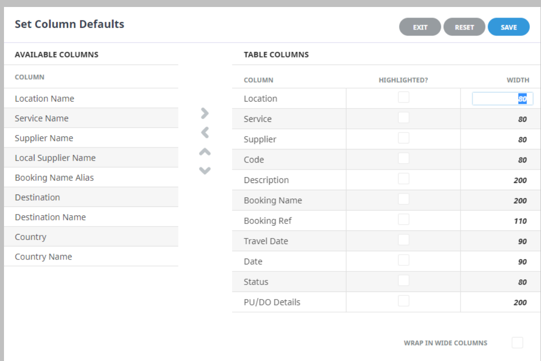
All column headings are now visible when screen scrolling is activated.

Substitute Service Columns

In the example below the default Location, Service, Supplier, Code, Description, Booking Name, Booking Ref, Travel Date, Date and Status headings are showing.

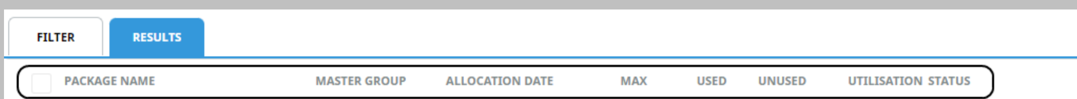


Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



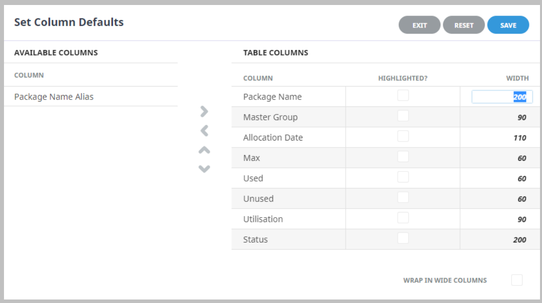
Book On Columns

In the example below the default Package Name, Master Group, Allocation Date, Max, Used, Unused, Utilisation and Status headings are showing.



Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the

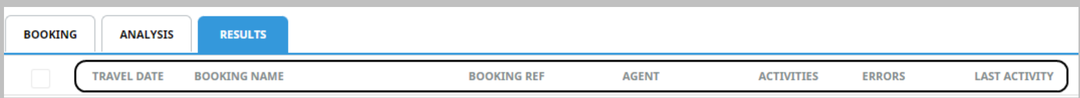
Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



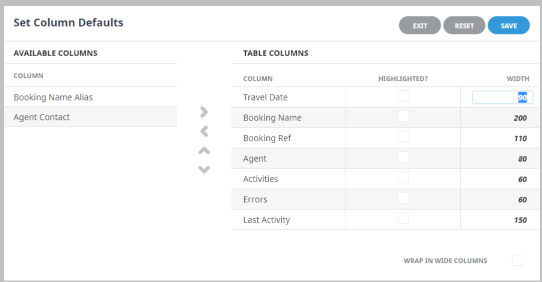
Column Heading	Description
*Package Name	The package (PCM) name.
*Master Group	The group booking reference.
*Allocation Date	The package departure date (Allocation date).
*Max	The maximum number of spaces on the package as set up in the allocation.
*Used	The number of spaces (pax) booked on the package.
*Unused	The number of spaces left on the package.
*Utilisation	percentage of space used on the package.
*Status	The status of the package in relation to the Group booking that will operate the package. Possible statuses are: » Link Required. A Group Booking has not yet been created. » Re-Link Required. The system has detected additional FIT bookings or changes to existing FIT Bookings that are not included in the Group Booking. » Linked. The Group Booking has been created and all FIT Bookings have been linked.
Package Name Alias	The alternative (PCM) package name (if used).

iCOM Activity Columns

In the example below the default Travel Date, Booking Name, Booking Ref, Agent, Activities, Errors and Last Activity headings are showing.



Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

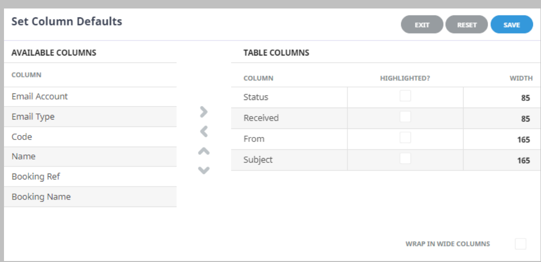


Column Heading	Description
* Travel Date	Booking Travel Date.
* Booking Name	Booking Name.
* Booking Ref	Full booking reference of booking. With Branch/Department and numerical code.
* Agent	Agent/Debtor Code.
* Activities	
* Errors	Reported errors noted.
* Last Activity	Date of last activity.
Booking Name Alias	The booking name alias, if alias field is used.
Agent Contact	Agent contact name.

Email Management Columns

In the example below the default Email Management columns are, Status, Received, From, and Subject.

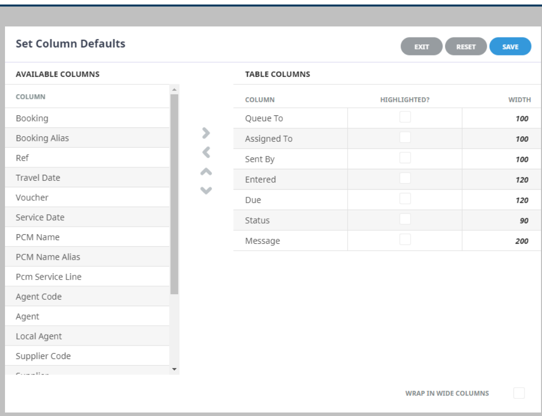
Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



Queue Management Columns

In the example below the default Queue To, Assigned To, Sent By, Entered, Due, Status and Message are showing.

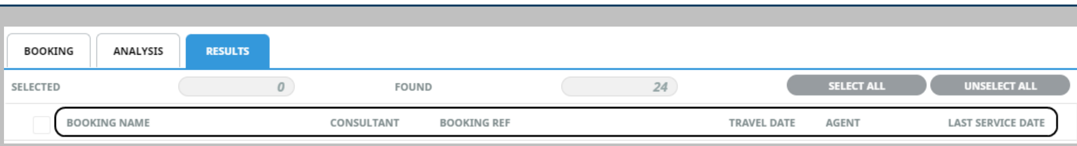
Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



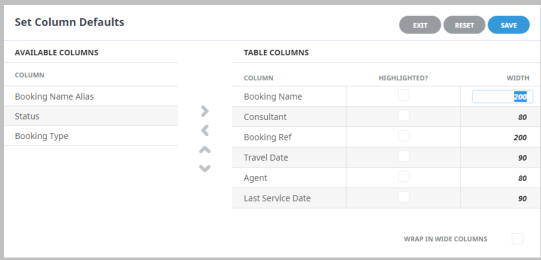
Column Heading	Description
* Queue To	User or Group queue the message was assigned to.
* Entered	Date message entered.
* Due	Message due date.
* Status	Message status.
* Message	Message text.
Booking	Booking Name.
Booking Alias	Booking Name Alias.
Ref	Booking Reference.
Travel Date	Travel Date of Booking.
Booking Consultant	Booking Consultant Initials.
Booking Consultant Name	Booking Consultant Name.
Voucher	Voucher Number.
Service Date	Service Line Service Date.
PCM Name	PCM Name.
PCM Consultant	PCM Consultant Initial.
PCM Consultant Name	PCM Consultant Name.
PCM Service Line	PCM Service Line.
Agent Code	Booking Agent Code.
Agent	Booking Agent Name.
Supplier Code	Supplier Code.
Supplier	Supplier Name.
Def. Code	Queue Definition Code.
Def. Name	Queue Definition Name.
Scope	Queue Scope. (Agent, Booking, Booking Service Line, General, PCM, PCM Service Line, Supplier or User).

Recalculate All Bookings Columns

In the example below the default Booking Name, Consultant, Booking Ref, Travel Date, Agent and Last Service Date headings are showing.

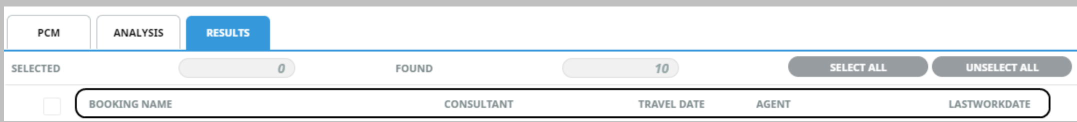


Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

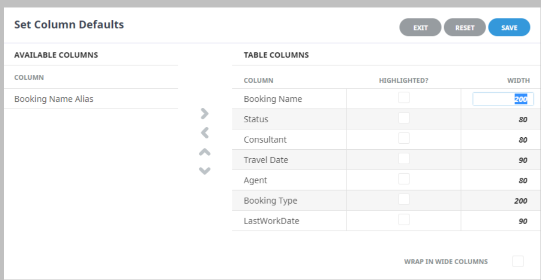


Recalculate All PCM Quotes Columns

In the example below the default Booking Name, Consultant, Travel Date, Agent and Last Work Date headings are showing.

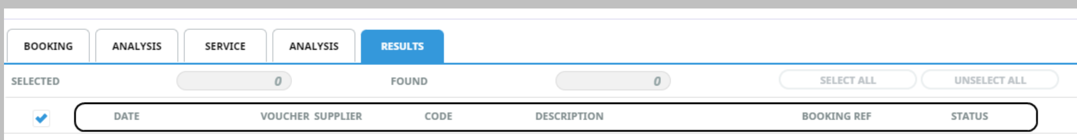


Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



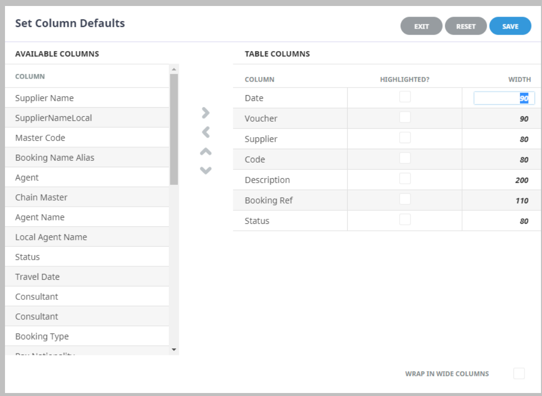
Recalculate All Services Columns

In the example below the default Date, Voucher, Supplier, Code, Description, Booking Ref and Status headings are showing.



Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the

Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

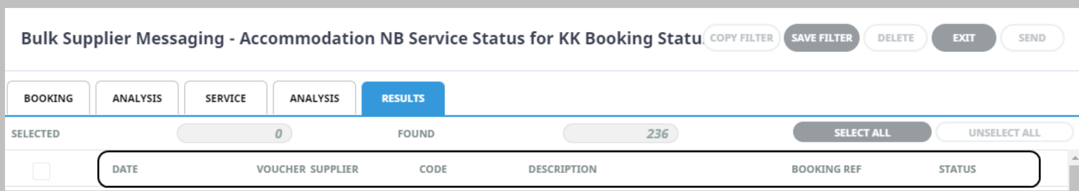


Bulk Documentation

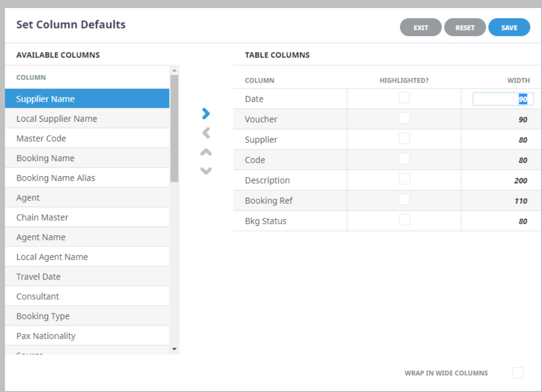
All column headings are now visible when screen scrolling is activated.

Bulk Supplier Messaging Columns

In the example below the default Date, Voucher Supplier, Code, Description, Booking Reference, and Status headings are showing.



Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list or highlighted, and column widths can be customised depending on user requirements.

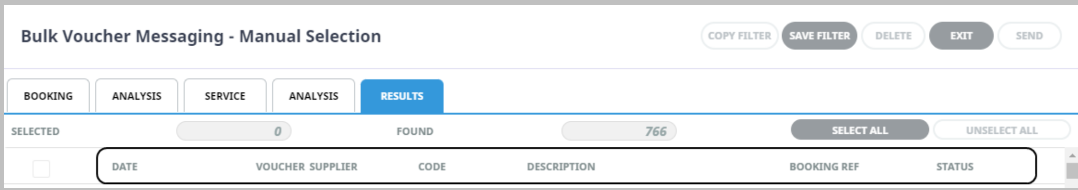


* indicates a column in the default view.

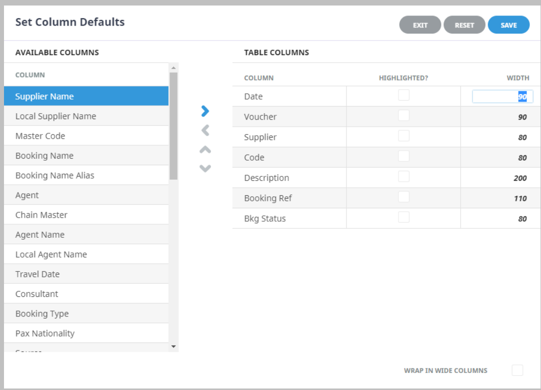
Column Heading	Description
* Date	Service date
* Voucher	Voucher number
* Supplier	Supplier Code
* Code	Service code
* Description	Service description
* Booking Ref	Booking reference
* Bkg Status	Status of booking
Supplier Name	Supplier full name or label
Local Supplier Name	Alternative supplier name
Master Code	Master supplier code
Booking Name	Name of booking
Booking Name Alias	Alternative name of booking
Agent	Agent code
Chain Master	Master agent code
Agent Name	Agent full name or label
Local Agent Name	Alternative agent name
Status	Service status
Travel Date	Booking travel date
Consultant	Consultant code
Consultant	Consultant name
Analysis 1-6	Booking analysis 1-6
Country	Country code of service
Destination	Destination code of service
Location	Location code of service
Location Name	Location name
Service	Service type code
Service Name	Service type description
Price Code	Price code
Voucher Status	Voucher Status
Pickup	Pick up date
Pickup Time	Pick up time
Pickup Remarks	Pick up remarks
Dropoff	Drop off date
Dropoff Time	Drop off time
Dropoff Remarks	Drop off remarks
Remarks	Service Line Remarks
Last Worked Date	Last worked date

Bulk Voucher Messaging Columns

In the example below the default Date, Voucher Supplier, Code, Description, Booking Reference, and Status headings are showing.

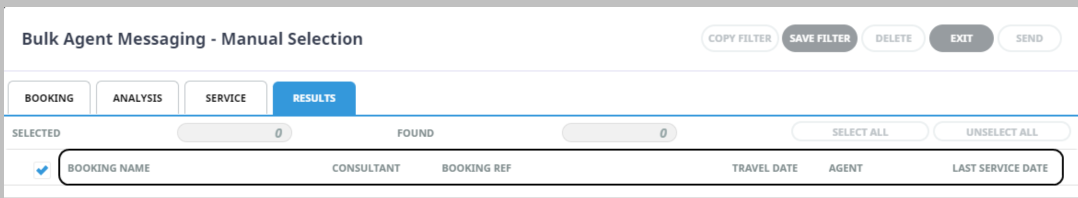


Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

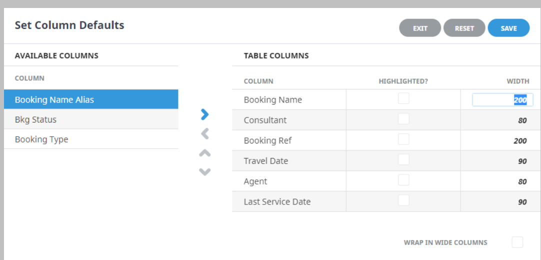


Bulk Agent Messaging Columns

In the example below the default Booking Name, Consultant, Booking Ref, Travel Date, Agent and Last Service Date headings are showing.



Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the higlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



* indicates a column in the default view.

Column Heading	Description
*Booking Name	Name of booking
*Consultant	Consultant code
*Booking Ref	Booking reference
*Travel date	Travel date on booking
*Agent	Agent code
*Last Service Date	Date of last service
Bkg Status	Booking status
Booking Name Alias	

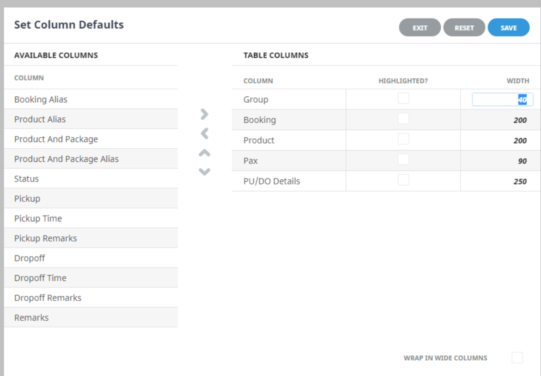
Resource Assignments

All column headings are now visible when screen scrolling is activated.

New Assignment Columns

In the example below the default Group, Booking, Product, Pax and PU/DO Details headings are showing.

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.



Resource Assignment Columns

Column Heading	Description
* Start Date	Service start date
* Name	Assignment name
* Assignment Type	Assignment type (Single, Independent, or Hop on Hop off)
* Status	Assignment status
* Pax	Number of pax
* Bookings	Booking number for assignment
* Driver	Driver initials
* Vehicle	Vehicle code
* Guide	Guide initials

Column Heading	Description
End Date	Service end date
Driver Description	Driver description (often the full Name of driver)
Vehicle Description	Vehicle description (often the name, make model or registration of vehicle)
Guide Description	Guide description (often the full Name of guide)

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