TOURPLAN

Groups
User Manual

Published: 28 October 2025 | Based on: Tourplan NX Version 2.5.9

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CHAPTER 1

Getting Started with Groups

The Tourplan Groups module enables Group bookings to be added, changed or deleted. Quotations can also be made in Groups, however the PCM module enables multiple pax range quotations to be made (which can then be copied into Groups).

Groups is connected to the Tourplan Product Database to allow instant recall of products, costs, prices, availability etc. Costs and prices are calculated automatically based on the travel date plus agent settings for each service added to a booking.

Functions are available during the booking process to generate a range of Supplier and Agent messages, as well as produce client documentation, including vouchers and itineraries. Invoices to Agents are generated directly from within a booking.

Tourplan NX makes no judgement as to what the difference is between an FIT and a Group Booking; i.e. when should FITs be used and when should Groups be used. Passenger numbers do not enter into it - the only rule that needs to be observed is that FITs ignores any references in the Product Database to Escorts, Drivers and Guides, so if a booking being handled has any of those elements in it, then Groups must be used.

In this chapter ...

About the User Manuals 8
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Adding Groups Code Data 17

The set up steps (e.g. Add Groups Code Data) may have been completed for you during system installation - check with your system administrator.

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 when logged into 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)	NOTE:	Highlights a relevant comment or point about the section or procedure.
Note (more important)		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**.

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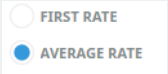
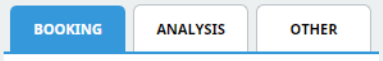
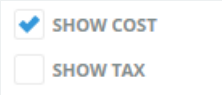
Getting Started With Tourplan NX

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.

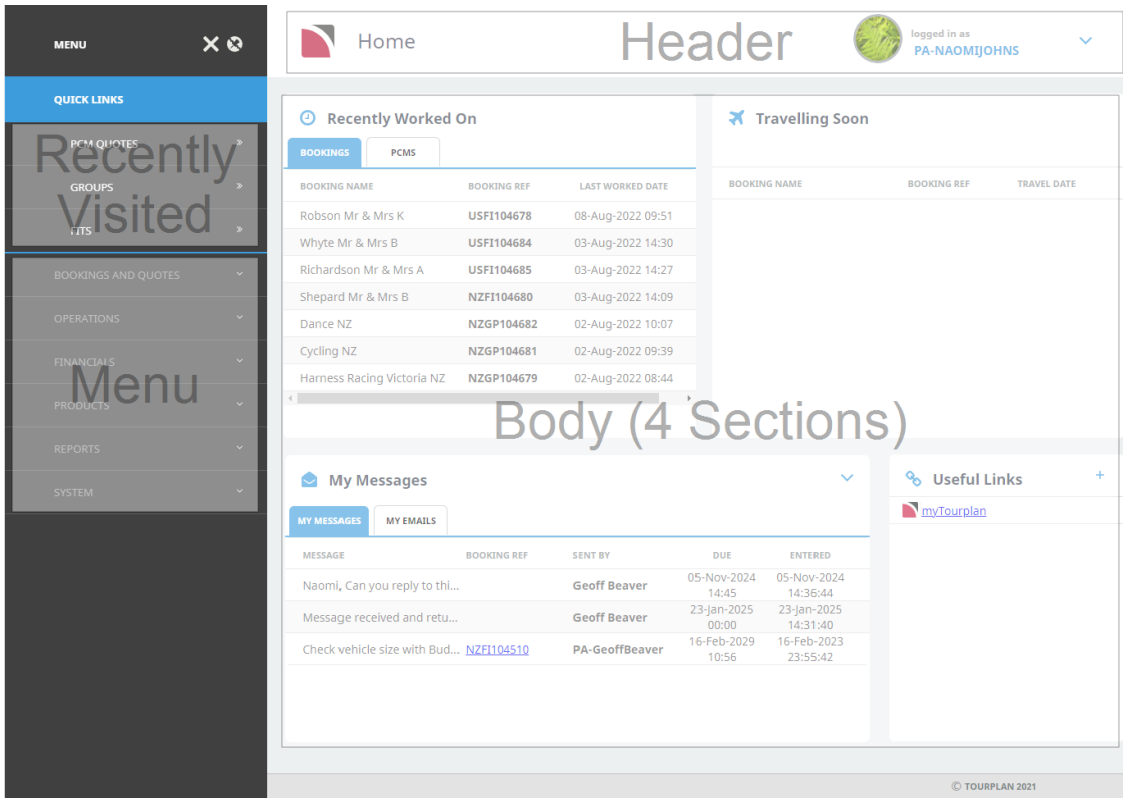
About the Landing Page

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.

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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.

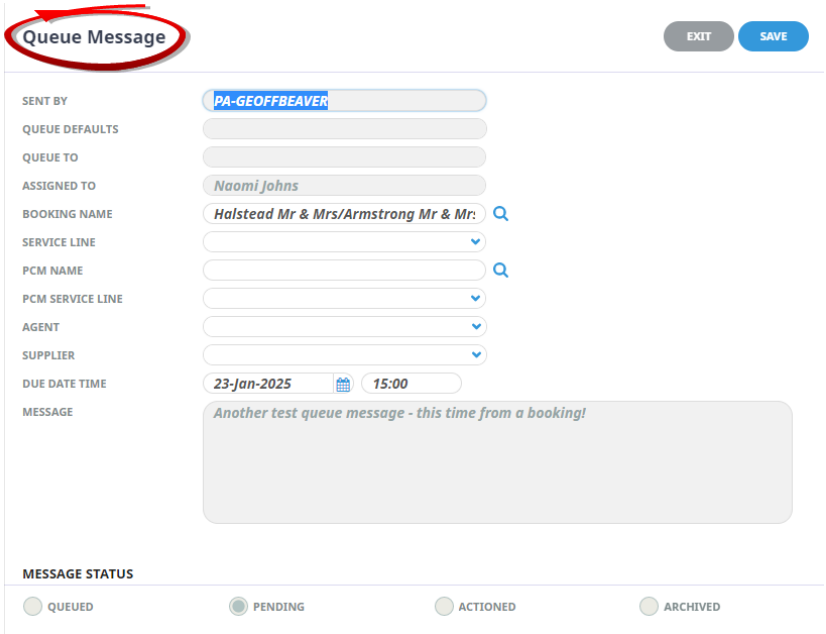
Bookings can be opened from the dashboard and the received message replied to from within the booking.

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

Respond to a Message in My Messages

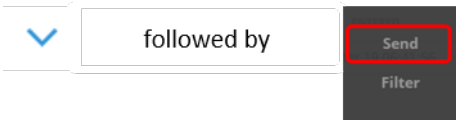
Messages can be responded to and the message status updated.

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

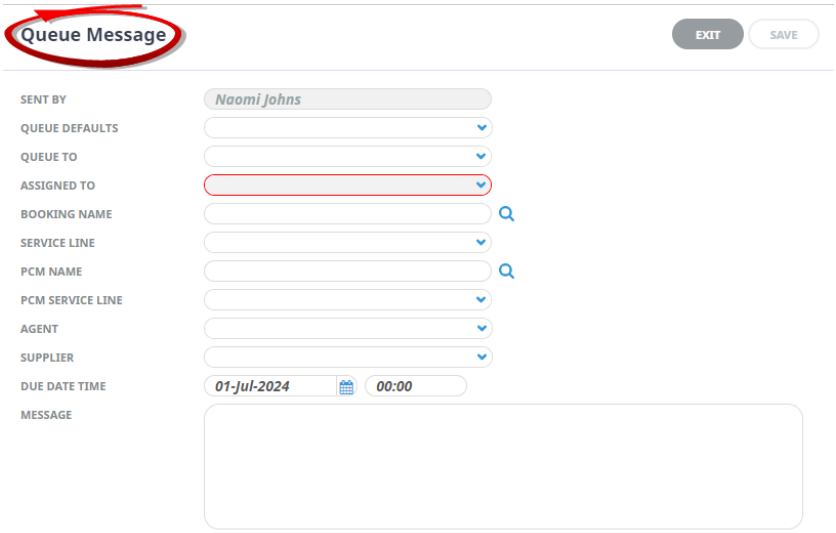


2. Modify any fields that might need updating and click **Save**.

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**.

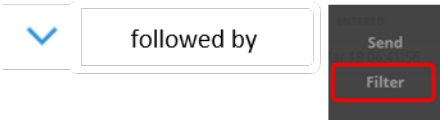


4. On the new **Queue Message** screen, assign an internal queue message to one or more colleagues. The message can identify a specific booking/PCM, Agent or Supplier for reference.

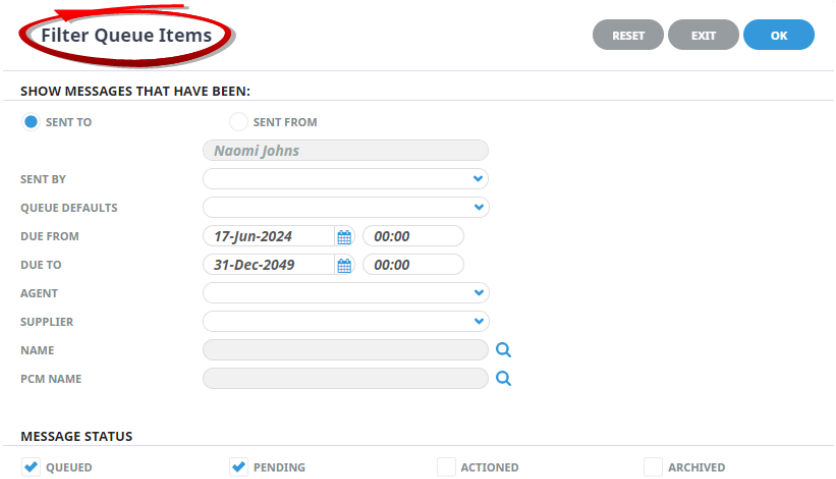


5. Click **Save** to send the message.

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.

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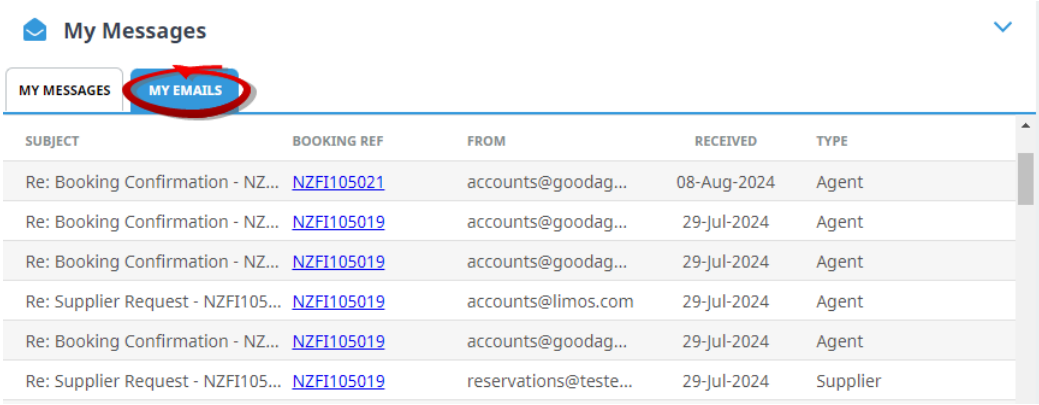
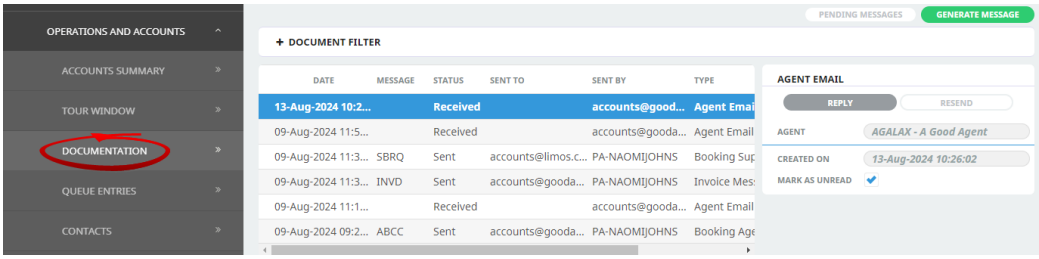
View Received Emails & Open Booking

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.

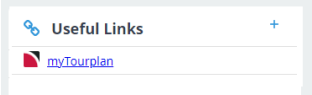
A number sequence provides the order the URL Name will display on the Dashboard.

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

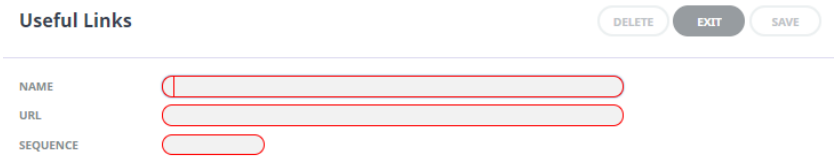
If the user no longer wants the URL to display a Useful Link can be removed from the Code Setup application. A System Administrator with access to Code Setup can change or remove a URL.

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.



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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.

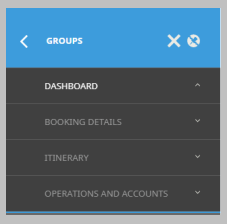
Menu Changes with Selections

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.

Example: Groups Menu

Bookings and Quotes > Groups

The menu view once a booking is selected or created:

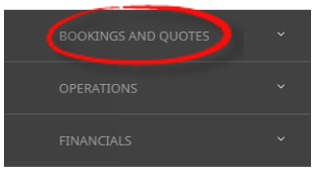


Menu Breadcrumb Trails

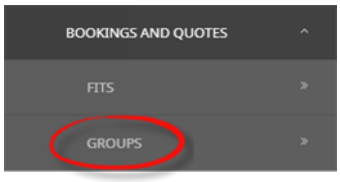
Earlier in this topic, we referred to a *menu breadcrumb trail* (**Home > Bookings and Quotes > Groups**). The meaning of this is straightforward; start with menu option **Home**, then select sub menu **Bookings and Quotes** and finally select **Groups**. This breadcrumb trail is expanded in the sequence of steps below, showing small screenshots at each step:

1. Click the **Home** hamburger menu to open it:

2. Click the **Bookings and Quotes** menu option to expand it:



3. Click **Groups** to open the Groups screen:



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.

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Adding Groups Code Data

Before creating any group bookings, the following steps must be completed to add required code data to the database:

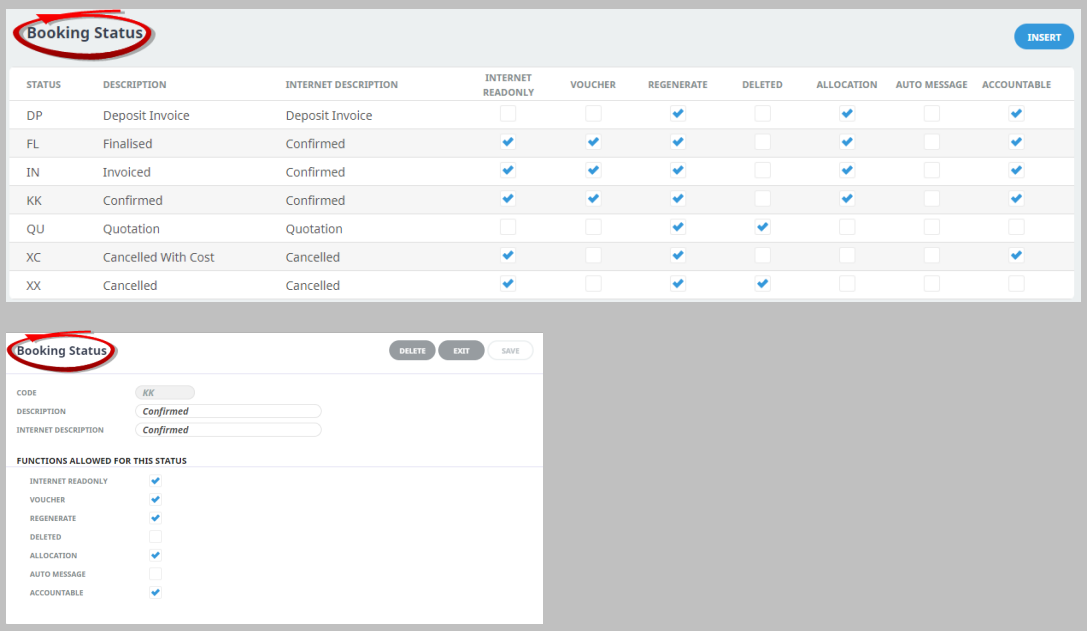
- Booking Status Codes
- Booking Consultants
- Groups-specific INI Settings
- Analysis Codes (optional)

Booking Status Codes

The current status of a Booking is indicated by a Booking Status Code and at least one must exist before a booking can be created.

There can be different status codes to indicate the various stages of the booking process; e.g., Quoted, Confirmed, Working, Travelling, Invoiced, Finalised etc. "Example: Booking Status - Confirmed" below shows a list of typical booking status codes, including the entry screen for adding a status of Confirmed.

Example: Booking Status - Confirmed



STATUS	DESCRIPTION	INTERNET DESCRIPTION	INTERNET READONLY	VOUCHER	REGENERATE	DELETED	ALLOCATION	AUTO MESSAGE	ACCOUNTABLE
DP	Deposit Invoice	Deposit Invoice			✓		✓		✓
FL	Finalised	Confirmed	✓	✓	✓		✓		✓
IN	Invoiced	Confirmed	✓	✓	✓		✓		✓
KK	Confirmed	Confirmed	✓	✓	✓		✓		✓
QU	Quotation	Quotation			✓	✓			
XC	Cancelled With Cost	Cancelled	✓		✓				✓
XX	Cancelled	Cancelled	✓		✓	✓			

Booking Consultants

Adding a booking consultant comprises two mandatory tasks before a new booking can be created:

a. Create a consultant entry
b. Bind the entry to a user ID

NOTE: Consultants entered here are automatically available in Groups and PCMs.

Groups-Specific INI Settings

The Groups INI setting STATUS must exist with a valid Booking Status attached, which is used as the Default Booking Status when a booking is created.

NOTE: A booking status that allows deletion of a booking must exist if a booking is to be deleted.

Analysis Codes

Up to 6 booking analysis codes can be attached via the Booking Details screen. After initial system installation, the codes are simply labelled Booking Analysis 1 - Booking Analysis 6 and they do not display in this menu node until they have been labelled in the INI Settings application (via Home > Code Setup > Bookings).

Each of the 6 Booking Analysis Codes has a default 'Blank' code 'Unassigned' description that defaults into bookings if these analysis codes are not required at the outset. They can be set up later when specific analysis needs have been determined.

Analysis codes are not required for creating a Group Booking, but they are needed when analysing and reporting on your bookings later. The following examples show lists of typical analysis codes, followed by their corresponding completed code fields.

Example: Lists of Analysis Codes

Booking Type

CODE	DESCRIPTION
	Unassigned
CO	Conference
FA	Fam Trip
IC	Incentive
PK	Package
SE	Series
SI	Special Interest
TM	Tailor Made/Bespoke

Markup M/A

CODE	DESCRIPTION
	Unassigned
MA	Manual

Reason Refused

CODE	DESCRIPTION
	Unassigned
01	Price
02	Unable to Travel
03	Booked Elsewhere
04	Service
05	Illness

Pax Nationality

CODE	DESCRIPTION
	Unassigned
AR	Argentina
AU	Australia
CA	Canada
CH	China
CR	Costa Rica
CZ	Czechia
FR	France
GE	Germany
HK	Hong Kong
HU	Hungary
IN	India
IT	Italy
MA	Malaysia
MX	Mexico
NE	The Netherlands
NZ	New Zealand
PE	Peru
PN	Panama
PO	Poland
RU	Russia
SA	South Africa

Source

CODE	DESCRIPTION
	Unassigned
01	Wholesaler
02	Travel Agent
03	Direct
04	Brochure
05	Website
06	Advertisement
07	Travelled Before
08	Internet

Doc's Status

CODE	DESCRIPTION
	Unassigned
FN	Finalised
IP	In Production
RQ	Requested

Quick Steps

Use the following list to move quickly to "How to" procedures in this guide:

1. Getting Started with Groups:
   a. Document Conventions
   b. "About the Tourplan-NX Menu" on page 15
   c. "Adding Groups Code Data" on the previous page
2. Creating New Group Bookings:
   a. "Create a Group Booking" on page 20
   b. "Set Pax Configurations" on page 23
   c. "Add an Itinerary" on page 54
   d. "Add Services to a Group Booking" on page 32
3. Managing Existing Group Bookings:
   a. "Retrieve an Existing Group Booking" on page 47
   b. "Working with Groups Booking Details" on page 59
   c. "Working with Itinerary" on page 99
   d. "Working with Operations and Accounts" on page 133
   e. "Creating Invoices" on page 137

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CHAPTER 2

Creating New Group Bookings

This chapter describes the tasks needed to enter all data required for a new Group Booking.

Creating new group bookings is straightforward and intuitive using Tourplan NX. This chapter describes the creation of a new booking as a simple two-step process, initiated from the Groups page using button **Insert New Booking**.

The first step covers entering basic booking details, such as booking name, travel date, pax configurations and rooming lists, while the second step describes how to add services to the booking. Examples of services are accommodation, transfers, rental cars and sightseeing tours.

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Create a Group Booking

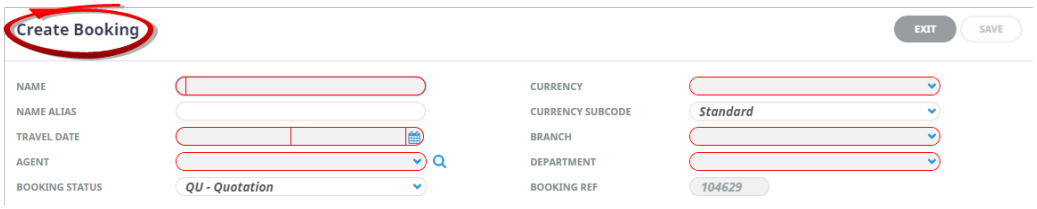
The procedure in this topic descibes the initial steps needed to create a new Group Booking.

Create a Group Booking

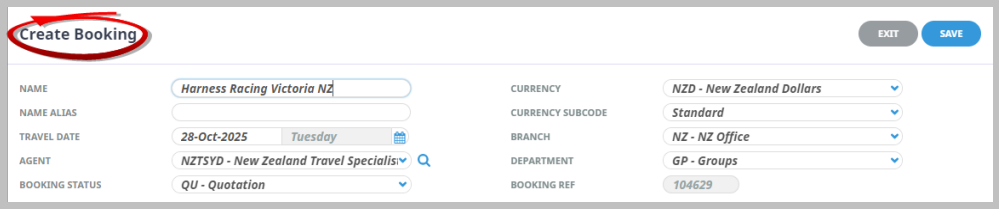
1. From the Home menu, select **Home > Bookings and Quotes > Groups**.

2. Click **Insert New Booking**.

3. On the empty **Create Booking** screen, give this booking a name and enter data into other fields as required. Refer to "About the Create Booking Fields" below for more information on the data you can enter.



This completed example shows a group booking named ***Harness Victoria N.Z.***



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

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

6. If you click *Save*, the Group Booking is created and the Pax Configurations screen is displayed.

   Continue to "Set Pax Configurations" on page 23.

> There is an alternative search method that User Company's may have selected at the time of system setup. The system can be configured to search for product before inserting booking details such as pax names. If this configuration has been enabled a **Product Search** button will be available as well as the **Insert New Booking** button. Users will be required to complete a refined details screen, nominating the configuration of room types before selecting the product search requirements.

About the Create Booking Fields

Name

Enter a name by which to identify the booking. The booking Name is the prime search and retrieval field for the booking.

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NOTE: Unlike FIT bookings, where passenger names can be used for bookings, group bookings present a naming challenge. It is sound practice to establish a group booking naming convention that enables all staff to be able to recognise and retrieve bookings.

If the booking name already exists, then subject to system settings, a warning may appear, or a password may be required to continue, or the entry of the name may be denied. If name entry is denied, the booking name must be altered.

Name Alias

The Name Alias field is an alternative name field to display a different name for the booking. Some Tourplan users may choose to use this field for messaging displaying an alternative language booking name.

Travel Date/Day

This is normally the date of the first service being provided. Some Tourplan user companies use different dates; e.g. date of departure from home country. If any date other than date of first service is to be used as the travel date, it is a decision taken by each user company.

The Travel Date can be altered using the **Change Travel Date** utility feature, but care should be taken as *any financial transactions that already exist against the booking will not be updated*.

Agent

This is the travel agent/wholesaler/end user etc that is making and paying for the booking. Select the agent from the drop-down list. Entering the first few characters of the agent code and clicking the drop-down will search from that point forward in the drop down list. If the agent is not listed, it will have to be created in the Debtors application.

NOTE: Clicking the Search button next to the agent name field will open a dialogue allowing a search on agent name etc.

NOTE: Dependant on system settings, a warning may display advising that the agent's credit limit is exceeded. Again, dependant on the settings, entry of the booking could be denied. These settings are user company specific.

Booking Status

The default initial booking status is displayed. This is defaulted from the Tourplan INI file and may be changed if required. This is determined by each user company's procedures.

NOTE: This is the status of the *Booking*, and does not relate to the status of individual services. The Booking Status determines what actions can be taken with the booking; i.e. whether vouchers can be issued or invoices raised, allocations taken etc. The configuration of booking statuses in Code Setup determines the permit-able actions of each status.

Currency

The agent's default sell currency, as set up in the Debtors application, is displayed. The currency may be changed for this booking by selecting an alternative currency from the drop-down list. Refer to the currency examples below.

NOTE: Only currencies which have been attached to the agent in Debtors will display in the drop down list.

NOTE: Currency rates between the Agent currency selected and the system currency (normally the currency of the country the system is domiciled in) must first be entered in the system currency exchange rate table.

Currency Subcode

If the Agent has a Currency Subcode attached to it, it will display here. It determines which (if any) of multiple exchange rates between the same currency pairs that is to be used. If the Subcode field is blank, it can be left blank, in which case the default currency rate will be used.

Branch

The default code is displayed if set up in the User's settings. Otherwise, select the branch code for this booking from the drop-down list or by typing the code.

NOTE: The 'Branch' is used as the first two characters of the booking reference and can have a bearing on revenue and expense postings in the financials.

Department

The default code is displayed if set up in the User's settings. Otherwise, select the department code for this booking from the drop-down list or by typing the code.

NOTE: The 'Department' is used as the second two characters of the booking reference and can also have a bearing on revenue and expense postings in the financials.

Once a Branch and Department have been selected and this screen exited, the Branch and Department should only be changed *prior* to any accounting transactions being entered against the booking. If accounting transactions have been entered, the Branch and/or Department should not be changed! *System Administrators can complete a system wide code change which can occur from within the Code Change Application, this will change the Branch or Department code system wide for all bookings.*

Reference

The system automatically creates a 6-digit reference number for this booking. The reference number is appended to the Branch and Department codes to form the full Booking Reference. The default value in this field cannot be changed.

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Set Pax Configurations

Group bookings, the *number* and *type* of pax are the lead detail.

Pax names are generally not known when the booking is created, so it can be created with the expected *number* and *type* of pax (Adults, Children, Infants) and rooms (Singles, Twins, Doubles etc). The services are added and the costs calculated before pax names need to be entered and it is the Pax Configuration screen where pax details, once known, are entered.

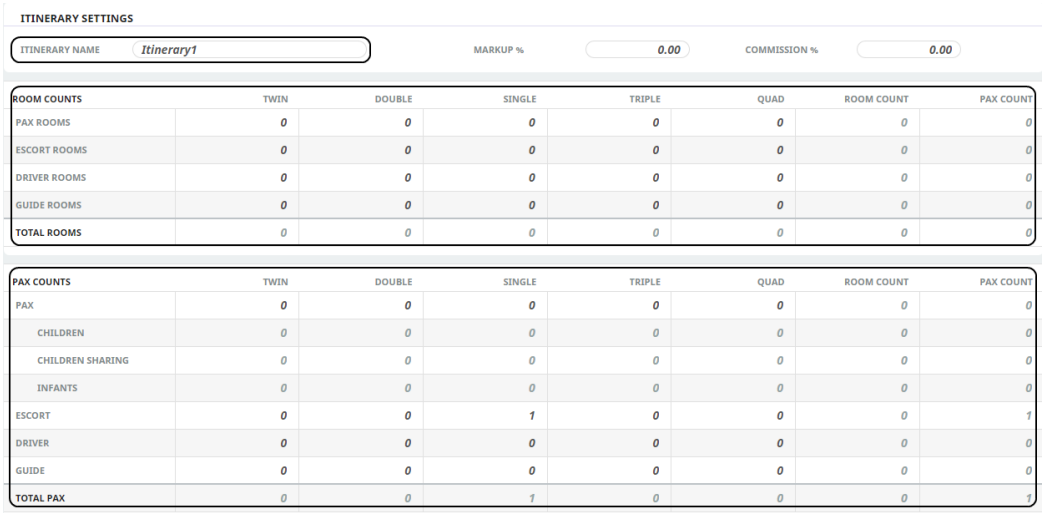
Pax Configurations enables the number and type of pax (adults, children and infants) plus the room configuration to be entered. This information is used by Tourplan NX to automatically cost and price the services that are subsequently added to the booking.

NOTE: Only pax types and room quantities are required for costing purposes; individual passenger names can be added later via the Rooming List option.

Set Pax Configurations

1. If you haven't already, either:
   a. create a new booking (see "Create a Group Booking" on page 20), or
   b. retrieve an existing booking (see "Retrieve an Existing Group Booking" on page 47).

2. Immediately after creating a new group booking header, the (empty) **Pax Configurations** screen is displayed, showing itinerary settings and room/pax count numbers. The Itinerary Name defaults to *Itinerary1*; change this to something more meaningful and enter quantities into the room and pax counts fields as required.



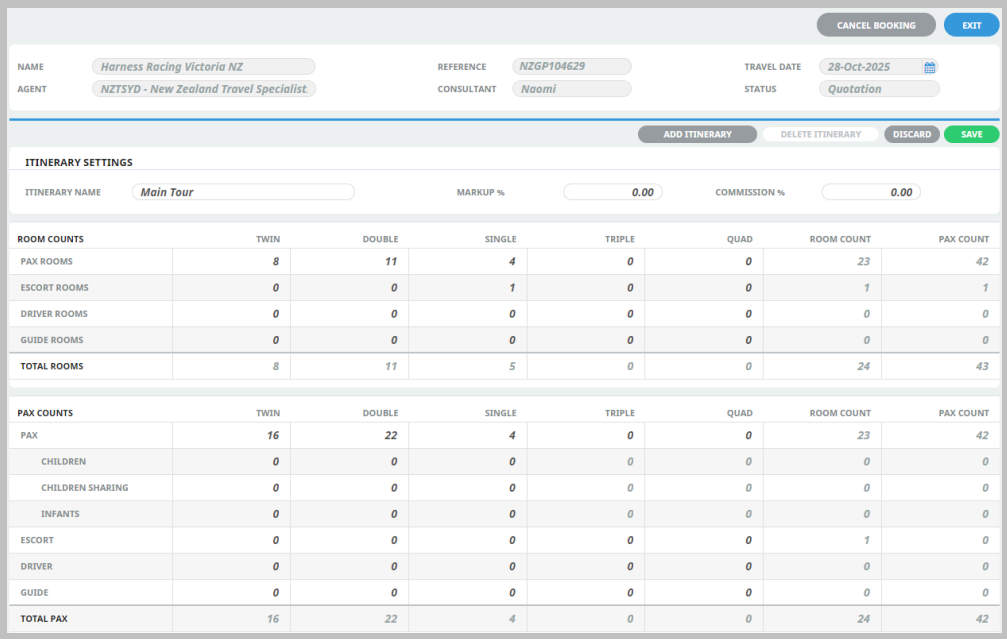
ITINERARY SETTINGS

ITINERARY NAME: *Itinerary1* | MARKUP %: 0.00 | COMMISSION %: 0.00

ROOM COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX ROOMS	0	0	0	0	0	0	0
ESCORT ROOMS	0	0	0	0	0	0	0
DRIVER ROOMS	0	0	0	0	0	0	0
GUIDE ROOMS	0	0	0	0	0	0	0
TOTAL ROOMS	0	0	0	0	0	0	0

PAX COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX	0	0	0	0	0	0	0
CHILDREN	0	0	0	0	0	0	0
CHILDREN SHARING	0	0	0	0	0	0	0
INFANTS	0	0	0	0	0	0	0
ESCORT	0	0	1	0	0	0	1
DRIVER	0	0	0	0	0	0	0
GUIDE	0	0	0	0	0	0	0
TOTAL PAX	0	0	1	0	0	0	1

This completed example shows a single itinerary named ***Main Tour***, requiring ***8*** twin rooms, ***11*** double rooms and ***5*** single rooms (including ***1*** for the escort).



CANCEL BOOKING | EXIT

NAME	Harness Racing Victoria NZ	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialist	CONSULTANT	Naomi	STATUS	Quotation

ADD ITINERARY | DELETE ITINERARY | DISCARD | SAVE

ITINERARY SETTINGS

ITINERARY NAME	Main Tour	MARKUP %	0.00	COMMISSION %	0.00

ROOM COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX ROOMS	8	11	4	0	0	23	42
ESCORT ROOMS	0	0	1	0	0	1	1
DRIVER ROOMS	0	0	0	0	0	0	0
GUIDE ROOMS	0	0	0	0	0	0	0
TOTAL ROOMS	8	11	5	0	0	24	43

PAX COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX	16	22	4	0	0	23	42
CHILDREN	0	0	0	0	0	0	0
CHILDREN SHARING	0	0	0	0	0	0	0
INFANTS	0	0	0	0	0	0	0
ESCORT	0	0	0	0	0	1	0
DRIVER	0	0	0	0	0	0	0
GUIDE	0	0	0	0	0	0	0
TOTAL PAX	16	22	4	0	0	24	42

NOTE: Most bookings require only one itinerary, however, you can add multiple itineraries if required (see "Add an Itinerary" on page 54 in "Working with Itinerary" on page 99).

3. If there are further pax configuration changes you wish to make, such as adding children or including escorts, refer to "Pax Configuration Variations" on page 26.

4. To keep the changes, click **Save**.

5. Click **Discard** to discard all changes.

About the Pax Configuration Fields

Itinerary Settings

Name

Defaults to "Itinerary 1" – this name can be overridden. Within one Tourplan group booking there may be multiple itineraries or sub-tours. This multiple itinerary function may be used, for example, to handle a situation where some Pax within the group are doing a 2-day side excursion while other Pax are not. Each itinerary can have a different Pax Configuration and different services.

Mark-up %

The default mark-up that should apply to the net cost of each service added to this itinerary in the booking. The value in this field can be obtained from either a system wide setting, a setting per agent, or manually entered. It may be left at 0.00% and the mark-up can applied at the end of the booking process, either as a percentage or currency amount.

Mark-up applied here is in addition to any mark-up which may be applied at Product Database level.

Commission %

The default Agent commission that should be calculated on the selling price of each service added to this itinerary in the booking. This field is normally left at 0% and the commission either automatically calculated based on a default Agent or Product Commission %, or inserted at the end of the booking process.

Room Counts

The Room Counts section of the screen is where the number and type of Rooms is entered into the booking. There are separate rows for Pax, Escorts, Drivers and Guides and separate columns for Twin, Double, Single, Triple and Quad Rooms. Entry can be made in any of the cells, except those that are dimmed-out (the 'Room Count' and 'Pax Count' columns), which is where the system calculates the total room and total pax count.

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Pax Counts

The Pax Counts section is where the Pax totals by Room type are calculated and where Children and Infant numbers can be added. The different type of Child rooms and costings are discussed in "Children/Children Sharing" on the next page.

Adjusting Pax Configurations

The Pax Configuration rooms and pax values can be adjusted manually to allow easy handling of a number of common variations, including:

- "Children/Children Sharing" on the next page
- "Escorts Sharing Room with Paying Pax" on page 27

Continue to "Pax Configuration Variations" on the next page for more information on different pax configurations.

Pax Configuration Variations

This topic describes some common variations for rooms and pax values when setting-up group bookings.

Children/Children Sharing

Costings for children can be different depending on the number of Adults and Children in the room and what the room type is. For this reason there are two types of child cost:

1. Children

   This where the child is free (or a nominal charge) if sharing the room with adults (and generally using existing bedding). Any charge for a child will have been entered in the Product Database as a 'Child Supplement'. 2 Adults and 1 Child in a Twin room would trigger this type of charge.

2. Children Sharing

   This is where the child is technically occupying an adult space in the room, and the room cost is shared between the adult and the child. 1 Adult and 1 Child in a Twin room is an example of a Child Share.

When there are Children/Children Sharing in Groups, the type of pax (Adults, Children, Children Sharing) and type of Room have to be manually entered.

The rule regarding Children in *1. Children* above applies only to Accommodation services. For Non-Accommodation services (Sightseeing, Transport etc.) Children and Children Sharing are treated in the same manner.

Tourplan NX will not allow the Pax Configuration screen to be saved if incorrect configuration detail is entered.

Pax Configuration - Add Children

1. Make sure the pax configurations screen is displayed (see "Set Pax Configurations" on page 23).

2. On the **Pax Configurations** screen, select the *Children* row and the room type column (*Twin*, *Double* etc.) to which the children are to be added and enter the quantity of children for each room type.

ROOM COUNTS	TWIN	DOUBLE
PAX ROOMS	6	8
ESCORT ROOMS	0	0
DRIVER ROOMS	0	0
GUIDE ROOMS	0	0
TOTAL ROOMS	6	8

PAX COUNTS	TWIN	DOUBLE
PAX	12	16
CHILDREN	1	1
CHILDREN SHARING	0	0
INFANTS	0	0
ESCORT	0	0
DRIVER	0	0
GUIDE	0	0
TOTAL PAX	12	16

In this example, ***1*** child has been added to the *Twin* rooms and ***1*** child added to *Double* rooms.

3. To keep the changes, click **Save**.

4. Click **Discard** to discard all changes.
5. If you are done with pax configurations, continue to " Adjust Booking Details" on page 29, otherwise, return to "Set Pax Configurations" on page 23.

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NOTE:

- Adding more than 1 child to a room type column in no way infers how many children are in any given room, or which rooms the children are in. If there were 2 children in the Twin Room column, it could mean that 1 of the adult twin rooms has 2 children in it, or it could mean that 2 of the adult twin rooms have 1 child each.
- Since, in this example, children are paying (where applicable) the "Child Supplement" (or no) cost, neither the Room Count, Room Configuration, nor the Total Pax paying quantity has changed.
- The correct number of Pax and Pax types (Adults, Children, Guides, Escorts and Drivers) will be output correctly on all documentation.

Pax Configuration - Add Child Sharing

1. Make sure the pax configurations screen is displayed (see "Set Pax Configurations" on page 23).
2. On the **Pax Configurations** screen, select the *Children Sharing* row and the room type column (*Twin*, *Double* etc.) to which the children are to be added and enter the quantity of children for each room type.

ROOM COUNTS	TWIN	DOUBLE
PAX ROOMS	6	8
ESCORT ROOMS	0	0
DRIVER ROOMS	0	0
GUIDE ROOMS	0	0
TOTAL ROOMS	6	8

PAX COUNTS	TWIN	DOUBLE
PAX	11	15
CHILDREN	0	0
CHILDREN SHARING	1	1
INFANTS	0	0
ESCORT	0	0
DRIVER	0	0
GUIDE	0	0
TOTAL PAX	12	16

In this example, ***1*** "Children Sharing" has been added to each of the *Twin* rooms and *Double* rooms.

3. To keep the changes, click **Save**.
4. Click **Discard** to discard all changes.
5. If you are done with pax configurations, continue to " Adjust Booking Details" on page 29, otherwise, return to "Set Pax Configurations" on page 23.

Example:

- When Children Sharing are added, the Total Room row for Twin and Double rooms will adjust. Taking the Twin Room column as an example, Tourplan NX will calculate that, to fit **12** Adults and **1** Child into Twin Rooms, **6.5** rooms will be required (the Total Rooms fields cannot be edited). The actual Pax will change to **11** adults and **1** child in twin rooms (and **15** adults and **1** child in double rooms), so the Pax row can be edited to **11** pax (Twin Room column) and **15** pax (Double Room column) to reflect the actual numbers.
- After the Pax row has been adjusted, the Total Rooms row will automatically adjust to **6** Twin and **8** Double and the number of pax is correct.

Escorts Sharing Room with Paying Pax

In the situation where an escort is sharing a room with a paying passenger, the pax and room quantities can again be adjusted to reflect the actual configuration.

This functionality only applies to Twin and Double room types.

Include Escorts Sharing Room wth Paying Pax

1. Make sure the pax configuration screen is displayed (see "Set Pax Configurations" on page 23).

2. On the **Pax Configurations** screen, under Room Counts, select the *Escort Rooms* row and the room type column (*Twin* and/or *Double*) to which the escorts are to be added and enter the quantity for each room type. Also, under Pax Counts, enter the number of escorts.

ROOM COUNTS	TWIN	DOUBLE
PAX ROOMS	6	8
ESCORT ROOMS	0	0.5
DRIVER ROOMS	0	0
GUIDE ROOMS	0	0
TOTAL ROOMS	6	8.5

PAX COUNTS	TWIN	DOUBLE
PAX	12	15
CHILDREN	0	0
CHILDREN SHARING	0	0
INFANTS	0	0
ESCORT	0	1
DRIVER	0	0
GUIDE	0	0
TOTAL PAX	12	16

In this example, the "Escort Room" has been added under Room Counts as half (***0.5 – the leading 0 is critical***) of a double room. Editing the Pax row under Pax Counts to be ***15*** (paying) pax will automatically change the Double room count to ***7.5*** rooms. Adding ***1*** in the Escort row in the Double column will correct the Total Pax to ***16***.

3. To keep the changes, click **Save**.

4. Click **Discard** to discard all changes.
5. If you are done with pax configurations, continue to " Adjust Booking Details" on the facing page, otherwise, return to "Set Pax Configurations" on page 23.

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Adjust Booking Details

For new bookings, the Booking Details screen contains some fields which are set up in the Create New Booking screen and additional fields, all related to the booking overall.

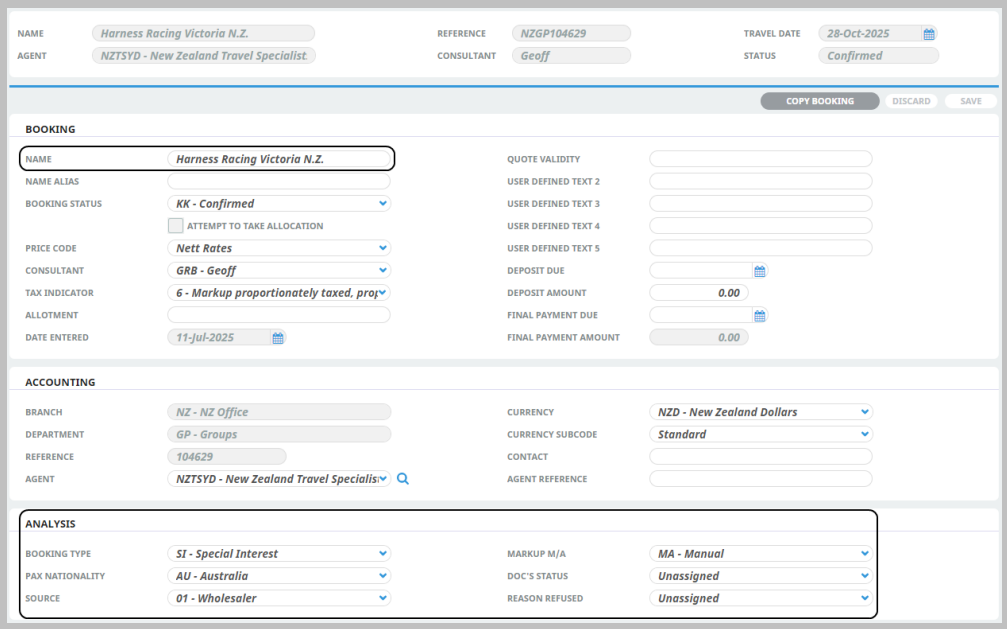
Adjust Booking Details

NOTE: This procedure applies to new bookings and follows "Set Pax Configurations" on page 23.

1. On the **Groups > Booking Details > General Setup** screen, update any of the fields that require changes (provided they are editable).

   This example shows changes made to the booking Name (edited to be *Harness Racing Victoria N.Z.*) and three of the six analysis codes:

   - Booking Type (*SI - Special Interest*)
   - Pax Nationality (*AU - Australia*)
   - Markup M/A (*MA - Manual*)



2. If necessary (i.e. if they are all **Unassigned**), set up the analysis codes related to group bookings.

3. To keep the changes, click **Save**.
4. Click **Discard** to discard all changes.
5. When you are done adjusting booking details, continue to "Add Services to a Group Booking" on page 32.

   NOTE: If you need to add additional itineraries to the booking, refer to "Add an Itinerary" on page 54.

About the Booking Details - General Setup Fields

The Booking Details - General Setup screen contains a number of fields that are completed during the create Booking process (see "Create a Group Booking" on page 20). The majority of these fields can be altered here if necessary. Descriptions of the additional fields are covered below.

Header Section

Details in this section are dimmed-out (refer to "About the Create Booking Fields" on page 20 for more information on the details entered).

NOTE: Although these fields are dimmed-out (i.e. read-only) in the header, some may be editable in other sections. For example, the Booking name can be edited via the *Name* field in the Booking section.

Booking Section

Name

The name of the Booking. Used to identify and search for a Booking.

Name Alias

The Name Alias filed is an alternative name field to display a different name for the booking. Some Tourplan user companies may choose to use this field for messaging, displaying an alternative language for the booking name.

Booking Status

The status of the Booking can be changed here. There may be different status codes to indicate the various stages of the booking process – e.g., Working, Travelling, Invoiced, Finalised etc.

Attempt to Take Allocation

This field is used in conjunction with the Booking Status "Allocation" setting, the Service Status "Allocation" setting and the Allocation code(s) attached to the agent. The field can have different labels on it depending on the status of the booking and any services in it.

If the Booking Status is one that does not permit allocations, the label will read “Release Allocation Currently Held”. This means that if there are services in the booking that have had allocation taken, when the booking status is changed to one that does not allow allocations, then checking the box will release the allocation. The checkbox will only be available if there is allocation to release.

When the Booking Status is changed to one that does allow allocations, the system will test the existing services that a) have a Service Status that allows allocations and b) there are enough rooms in the allocation (s) for the service. If these conditions are met (and the agent is entitled to use allocation), then this field will become active and the label will change to "Attempt to Take Allocation" and can be checked/unchecked as necessary. If checked, the system will attempt to automatically take allocations for the services which have already been entered.

NOTE: If a Quotation is being created in Groups, the Quote booking status attached should have the allocations flag set to ‘N’; i.e. to *not* take allocations for the quote

Price Code

This field must be left blank if the system is to use the Price Codes and defaults which are setup for the agent attached to the Booking. It should only be filled in if Price Code settings normally used for this agent need to be overridden. The fact that the field is blank, is in effect saying that the system is going to use the Agent default Price Code(s).

Consultant

The code and name of the person entering this Booking. This value is normally defaulted from the User’s details as defined in the Groups INI settings.

Tax Indicator

Normally defaulted to the tax indicator set against the Agent in Debtors. This field is used to determine how tax on Mark-ups and Commissions is handled.

Allotment

This field is only used if the allocation settings in Debtors for this agent are to be overridden. To override the default settings, type in the Allocation Split Code that is to be used for the booking.

Date Entered

Creation date of booking – automatically updated by Tourplan. An INI setting determines whether or not this value can be altered. If the date is dimmed out, it cannot be changed.

User-Defined Text (fields) 1-5

There are five user defined booking header text fields, each available in the booking header. The data in these fields can be output on Tourplan messages. In the example on Booking Detail Screen, only one label (*Quote Validity*) has been defined.

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The next four fields can be used to apply deposit payment requirements for a booking, these fields are not bound to service line deposit invoices which a supplier may require to secure the service. These fields allow Tourplan users to communicate their own booking deposit information irrespective of supplier deposit requirements. There are specific messaging substitution codes to support the generation of data from these fields.

Deposit Due

The date that the agent is required to pay a deposit for the booking.

Deposit Amount

The amount of the deposit required.

Final Payment Due

The date that the agent is due to make the final payment for the booking.

Final Payment Amount

The balance of the booking value that is due on the Final Payment Due date.

Accounting Section

Branch/Department/Reference

The displayed values are from the initial Booking Header set up.

The Reference field can never be changed. The Branch/Department fields can be changed provided there are no accounting transactions against the booking.

Agent

The agent as entered in the booking set up displays and can be changed if required.

If the agent is changed after services have been added to the booking, a recalculation option dialogue will display asking if the booking should be recalculated.

Currency

The defaulted Booking currency can be changed in this field if required (see "About the Create Booking Fields" on page 20).

NOTE: Changing the currency will force a recalculation of the Booking costs.

(Currency) Subcode

The defaulted currency Subcode can be changed in this field if required.

NOTE: Changing the currency subcode will force a recalculation of the Booking costs.

Contact

Agent contact name for this booking. May optionally be listed on agent messages.

Agent Reference

Any reference provided by the agent can be entered here. This field can be output on agent messages.

Analysis Section

Analysis Codes 1 – 6

These displayed values are from the initial header set-up and can be changed here if necessary. The labels may have been changed via *Home > Code Setup > INI Settings > System*.

Changing any of these fields will trigger a re-calculation.

Buttons

Copy Button - This button allows users to copy the booking, for more information on copying a booking see the topic called "Copy Booking" on page 97..

Add Services to a Group Booking

This screen enables Products (also known as Services when used in bookings) from the Tourplan NX Product Database to be added to a booking in order to create and cost the booking itinerary. There is no limit to the number of services that can be added to a booking.

NOTE: It is normal practice to insert products into a booking in the order in which they occur (i.e. date and time order). For example, Arrival Transfer / Coach Charter / Accommodation / Sightseeing and so on. Tourplan NX orders the services in the booking based on the Day Number, with the Base Travel Date being Day 1. Within each Day, services are ordered by Sequence Number.

For the purposes of providing meaningful examples in this document, specific details are used to illustrate each step in a procedure. These examples, including the information and selections available, will almost certainly be different in your environment. For example, the procedure below uses a specific transportation service type (Transport). In your environment, you will need to substitute the relevant transportation service type by making the appropriate selection from the Service Category list (headed up by *All Services*). Furthermore, a transport product does not really expose the depth and flexibility of the Tourplan NX system, so for the examples in this document, a Transport product is followed by an Accommodation product.

The following procedures show how to add additional types of product:

1. Transport
2. Accommodation
3. Entrance Fee

Insert a Transport Service

1. Services are added from the *Groups* > *Itinerary* menu.

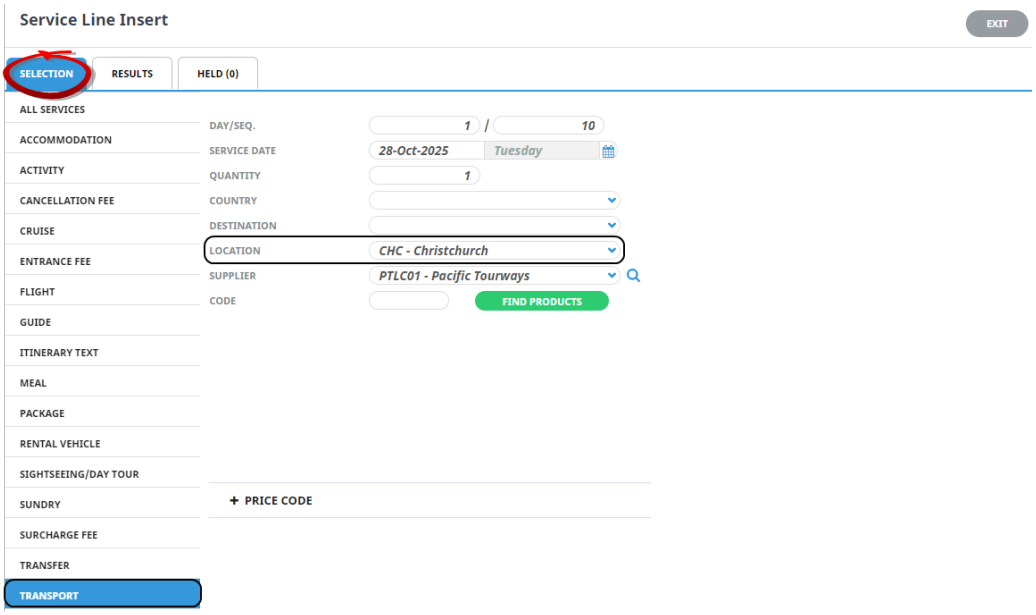
   a. Select menu **Groups > Itinerary** to show the itinerary for the booking.

   b. Click **Insert New Service**.

   INSERT NEW SERVICE

   NOTE: If there are no products yet added to the booking, the list of services will be empty.

2. From the **Service Insert** screen (Selection tab), select the appropriate transport/transfer type from the All Service Types list (e.g. *Transport*) and in the Location drop-down field, select the location where the service is provided (e.g. *CHC - Christchurch*). You can also enter other search criteria to reduce the number of results returned.



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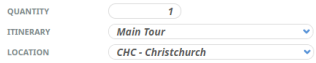
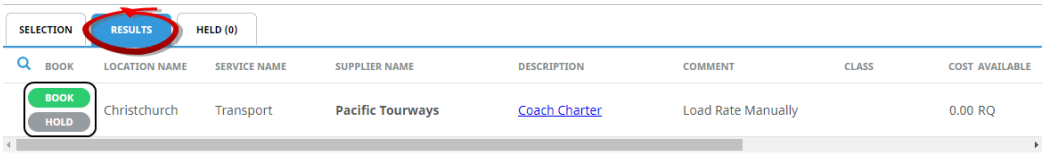
NOTE: If there is more than one itinerary available for the booking, the **Itinerary** drop-down field appears above the Location field. If the booking has only one itinerary, as in the above example, the Itinerary field is not shown.



3. Click **Find Products**.

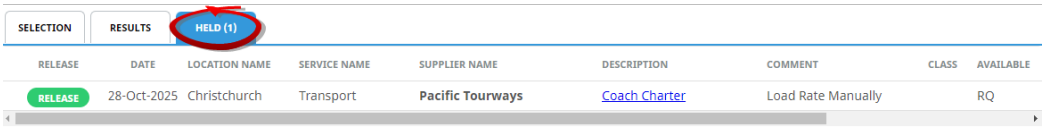
4. Products matching the Service Type and Location are returned in the **Results** tab. Find the product to add and click *Book* or *Hold* as required.



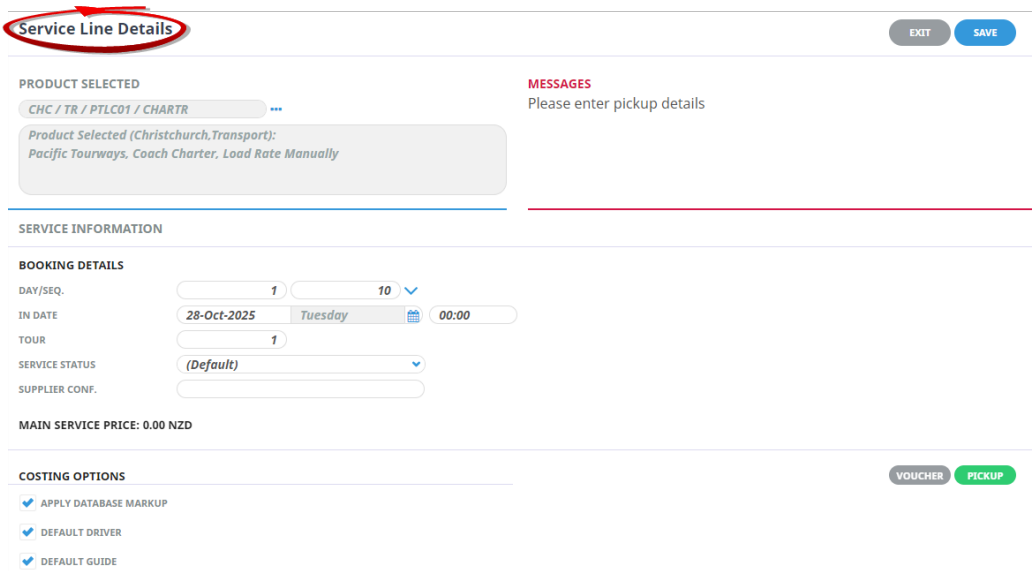
NOTE: Clicking Hold will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.

A product on hold will not block allocation for the product; allocation can only be held when a product is booked.

Any products that are held appear under the **Held** tab.



5. Go back to the Results tab and click *Book* beside a product to show full details of that **product**.



NOTE: If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.

A product is not formally booked until you click **Save**.

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

   SAVE

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

   EXIT

8. Once you click *Save*, the service is saved and the Itinerary view of the booking is displayed.

   You can now add another service (see "Add Services to a Group Booking" on page 32) or manage other parts of the booking (see "Managing Existing Group Bookings" on page 45).

   NOTE: Some services may require manual pricing - if this is the case, an overlay screen appears and you will need to manually add or edit pricing information (see "Manual/Edited Pricing" on page 43).

About the Service Insert Fields (Selection Tab)

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.

Quantity

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.

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NOTE:

- **Accommodation** - the FCU is Room, and the SCU is Night, so the quantity is the number of Nights required.
- **Non-accommodation** - e.g. for Charter Coach, the FCU is Coach, the SCU is Day or Tour, so the quantity required is either (a) the number of days hire (e.g. **10**, in which case the costs are on a daily basis), or (b) the number of tours (e.g. **1**, meaning the charter is for one tour and the price is the total charter cost. The system knows (from the product setup) how many people the coach can take and, if the number of people exceeds the available size, the system will automatically adjust the number of FCUs (Coaches) to suit so, in this example, the charter is per Tour, so the quantity is **1**.

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)

Price Code selection allows searching of products based on specific Price Codes, which may or may not be attached to the agent. The default setting of the radio buttons is controlled by the INI (System) setting OPTIONSCROLLPCRADIODEF.

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 using previously defined fields such as the hierarchy of price codes attached to the agent, or the pre-defined booking level price codes. This means that if the booking agent or booking price code is changed for any reason, the service price code may be re-evaluated applying an alternative price code.

The remaining selections are:

Selecting one of the remaining three options, will override the agent and booking level price code selections for this service. If the price code is not available for any reason then the next available price code assigned in the agent hierarchy will be used.

NOTE: The significance of selecting an option other than the System Price Code is that if the agent is changed or the booking is recalculated for any reason, the selected price code will take precedence over the agent price code defaulting logic.

About the Results Tab

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.

Book

A button labelled *Book* and a button labelled *Hold*, allowing the service to be either booked now or held (for later booking).

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*).

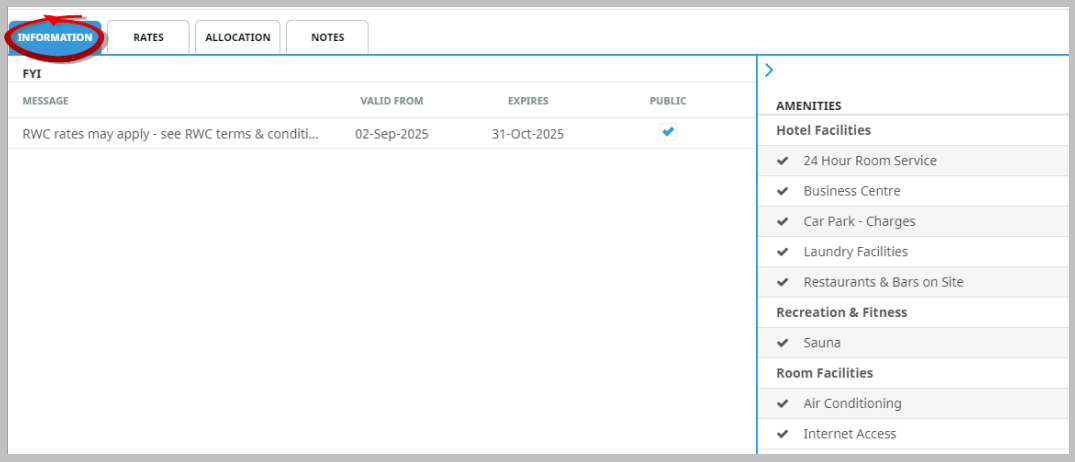
Name

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.



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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 booking , 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 booking until the Insert New Service process is complete, which requires each service being booked (*and* the **Save** button clicked.

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

Inserting Accommodation Services

Insert an Accommodation Service

1. Services are added from the *Itinerary* menu:

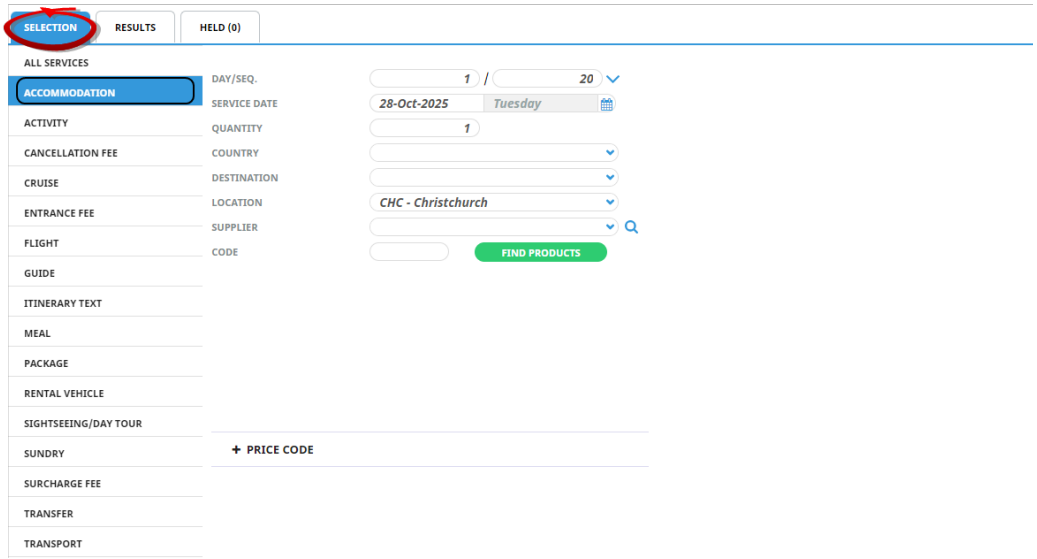
   a. Select menu **Groups > Itinerary** to show the itinerary for the Booking.

   b. Click **Insert New Service**.

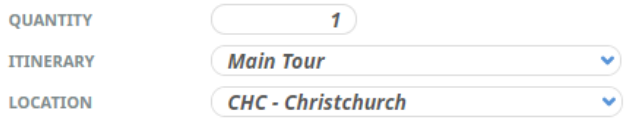
   INSERT NEW SERVICE

   NOTE: If there are no products yet added to the Booking, the list of services will be empty.

2. From the **Service Line Insert** screen (Selection tab), select the appropriate accommodation service type from the All Services list (e.g. *Accommodation*) and in the Location drop-down field, select the relevant location (e.g. *CHC - Christchurch*). You can also enter other search criteria to reduce the number of results returned.



   NOTE: If there is more than one itinerary available for the booking, the **Itinerary** drop-down field appears above the Location field. If the booking has only one itinerary, as in the above example, the Itinerary field is not shown.



   NOTE: Fields and selections available on this screen are described fully in "About the Service Insert Fields (Selection Tab)" on page 34.

3. Click **Find Products**.

   FIND PRODUCTS

4. Products matching the Service Type and location are returned in the **Results** tab. Find the product to add and click *Book* or *Hold* as required.

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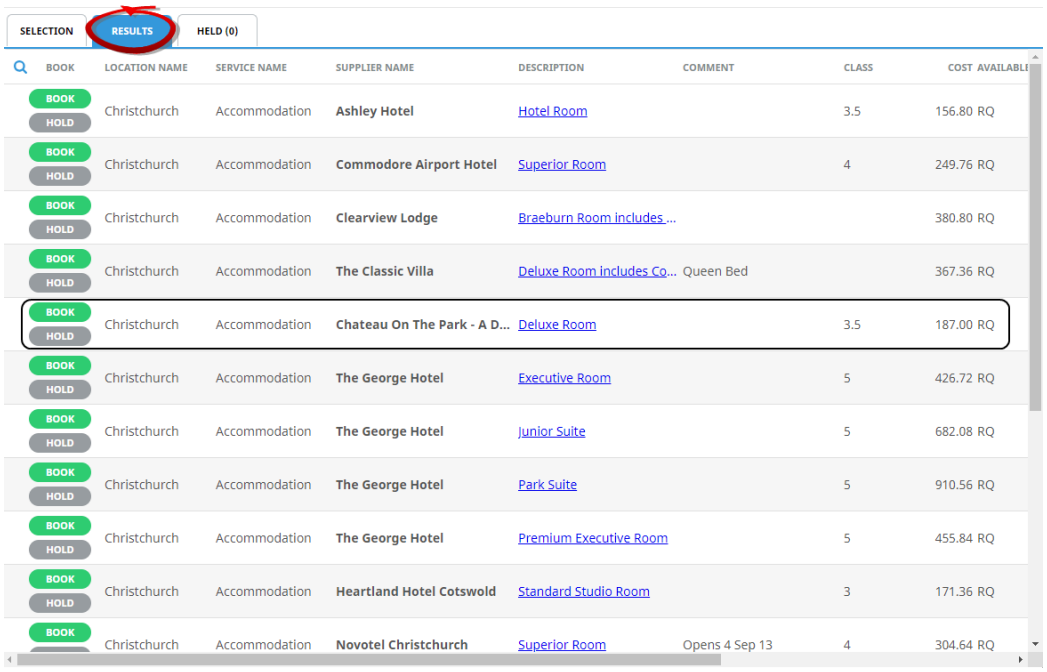


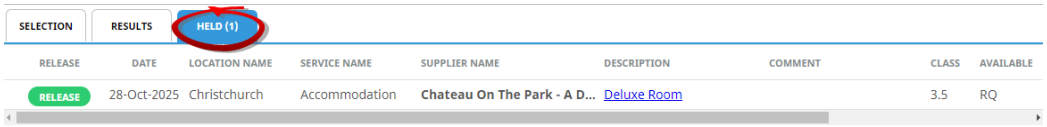
SELECTION | RESULTS | HELD (0)

BOOK	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	COST	AVAILABLE
BOOK HOLD	Christchurch	Accommodation	Ashley Hotel	Hotel Room		3.5	156.80	RQ
BOOK HOLD	Christchurch	Accommodation	Commodore Airport Hotel	Superior Room		4	249.76	RQ
BOOK HOLD	Christchurch	Accommodation	Clearview Lodge	Braeburn Room includes ...			380.80	RQ
BOOK HOLD	Christchurch	Accommodation	The Classic Villa	Deluxe Room includes Co...	Queen Bed		367.36	RQ
BOOK HOLD	Christchurch	Accommodation	Chateau On The Park - A D...	Deluxe Room		3.5	187.00	RQ
BOOK HOLD	Christchurch	Accommodation	The George Hotel	Executive Room		5	426.72	RQ
BOOK HOLD	Christchurch	Accommodation	The George Hotel	Junior Suite		5	682.08	RQ
BOOK HOLD	Christchurch	Accommodation	The George Hotel	Park Suite		5	910.56	RQ
BOOK HOLD	Christchurch	Accommodation	The George Hotel	Premium Executive Room		5	455.84	RQ
BOOK HOLD	Christchurch	Accommodation	Heartland Hotel Cotswold	Standard Studio Room		3	171.36	RQ
BOOK	Christchurch	Accommodation	Novotel Christchurch	Superior Room	Opens 4 Sep 13	4	304.64	RQ

NOTE:

- Clicking Hold will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.
- Additional fields and selections available on this screen are described in About the Service Line Insert Fields (Results tab).

Any products that are held appear under the **Held** tab.

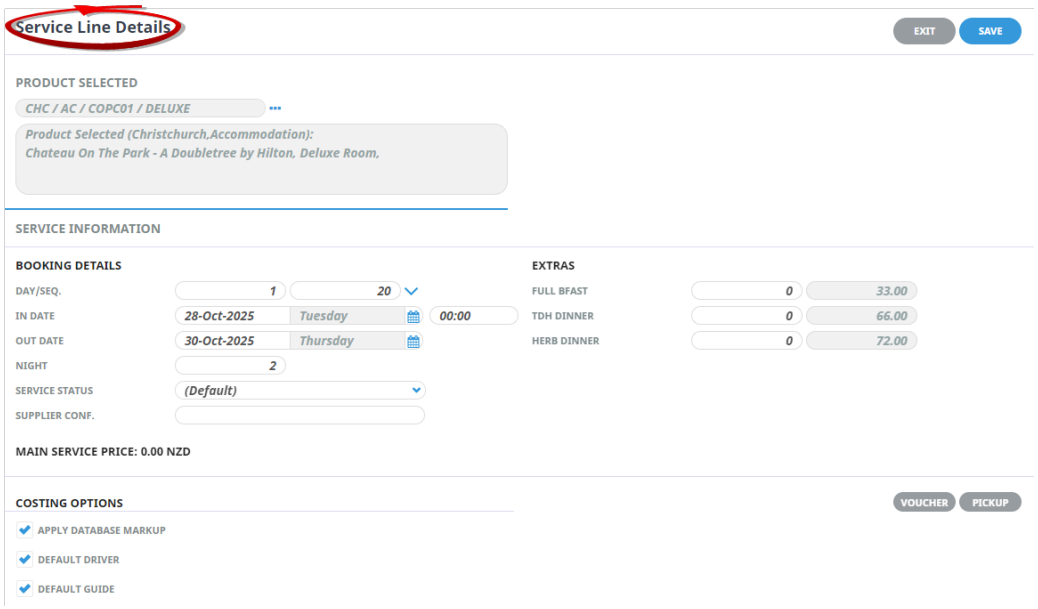


SELECTION | RESULTS | HELD (1)

RELEASE	DATE	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	AVAILABLE
RELEASE	28-Oct-2025	Christchurch	Accommodation	Chateau On The Park - A D...	Deluxe Room		3.5	RQ

NOTE: Additional fields and selections available on this screen are described in "About the Service Insert Fields (Selection Tab)" on page 34 (Held Services).

5. Go back to the Results tab and click *Book* beside a product to show full **Service Line Details** of the accommodation product selected, or select the **Book Held Services** button in the Held Tab. (There is still one more opportunity to exit before the service is actually saved).



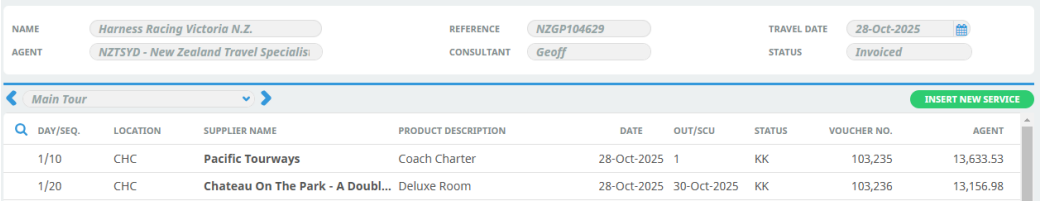
NOTE:

- If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.
- Additional fields and selections available on this screen are described in "Add Services to a Group Booking" on page 32

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

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

8. Once you click *Save*, the service is saved and the **Itinerary View** of the Booking is displayed.



NOTE: You can now add another service (see "Add Services to a Group Booking" on page 32) or manage other parts of the booking (see "Managing Existing Group Bookings" on page 45.

NOTE: Some services may require manual pricing - if this is the case, the *Service rate requires manual pricing entry* screen appears and you will need to manually add pricing information (see "Manual/Edited Pricing" on page 43).

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Inserting Entrance Fee Services

Insert an Entrance Fee Service

1. Services are added from the *Groups* > *Itinerary* menu:

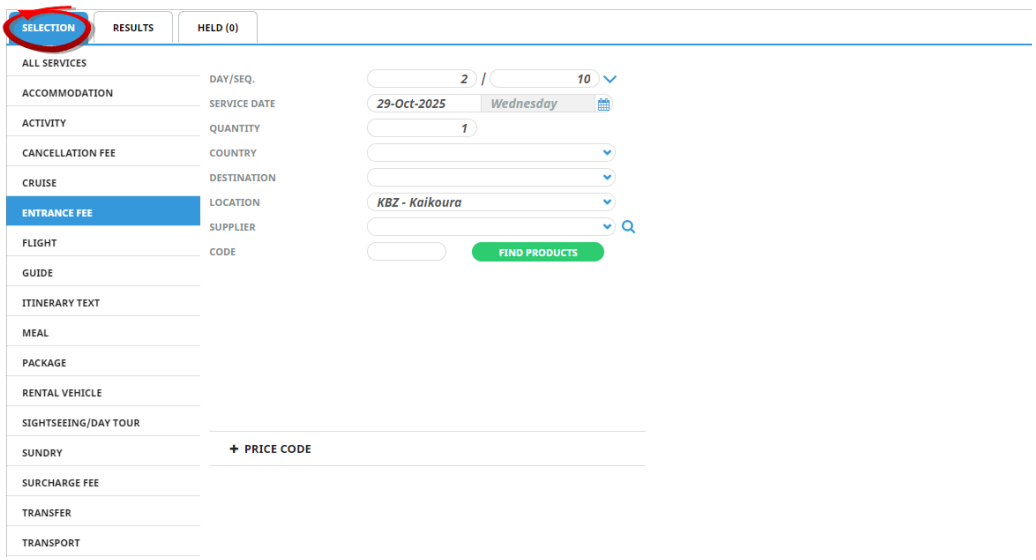
   a. Select menu **Groups > Itinerary** to show the itinerary for the booking.

   b. Click **Insert New Service**.

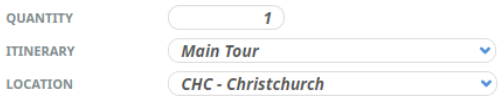
   INSERT NEW SERVICE

   NOTE: If there are no products yet added to the booking, the list of service lines will be empty.

2. From the **Service Insert** screen (Selection tab), select the appropriate attraction/entrance fee service type from the All Service Types (e.g. *Entrance Fee*) and, in the Location drop-down field, select the relevant location (e.g. *KBZ - Kaikoura*). You can also enter other search criteria to reduce the number of results returned.



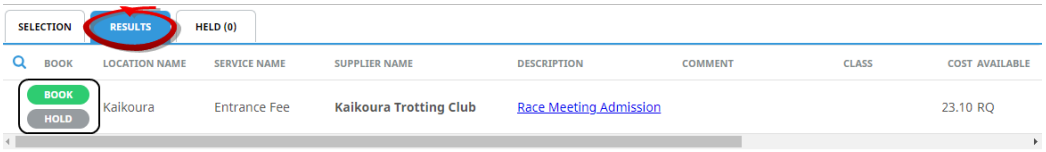
   NOTE: If there is more than one itinerary available for the booking, the **Itinerary** drop-down field appears above the Location field. If the booking has only one itinerary, as in the above example, the Itinerary field is not shown.



3. Click **Find Products**.

   FIND PRODUCTS

4. Products matching the service and location are returned in the **Results** tab. Find the product to add and click *Book* or *Hold* as required.

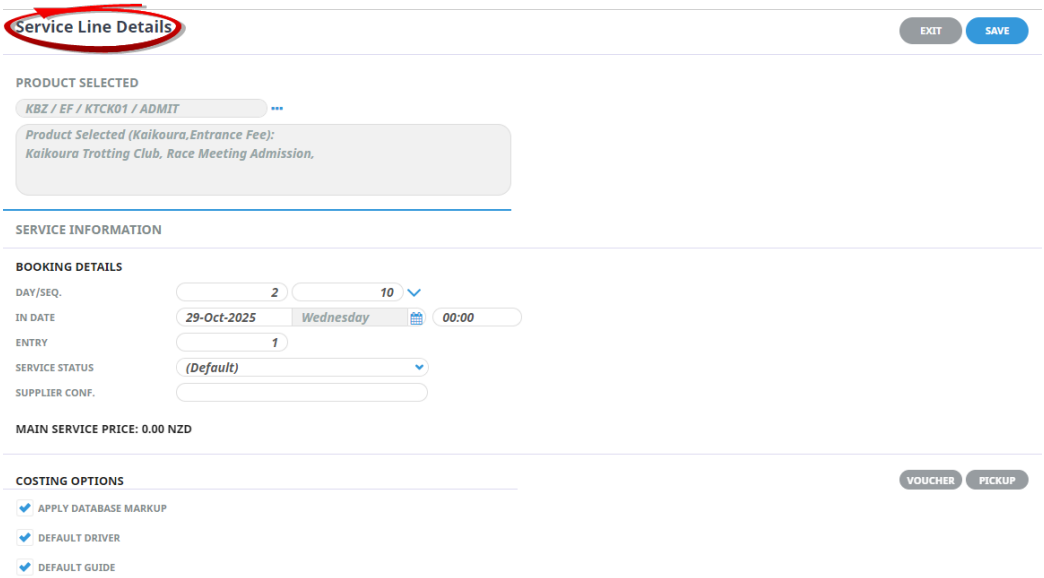


NOTE: Clicking *Hold* will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.

Any products that are held appear under the *Held* tab.

Use the *Filter* button to open the Filter Selections screen to further reduce the list of results returned.

5. Go back to the Results tab and click *Book* beside a product to show full **Service Line Details** of the Entrance Fee Product selected (there is still one more opportunity to exit before the service is actually booked).



NOTE: If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.

A product is not formally booked until you click **Save**.

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

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

8. Once you click *Save*, the service is saved and the Itinerary view of the booking is displayed.

   You can now add another service (see "Add Services to a Group Booking" on page 32) or manage other parts of the booking (see "Managing Existing Group Bookings" on page 45).

   NOTE: Some services may require manual pricing - if this is the case, the *Service rate requires manual pricing entry* screen appears and you will need to manually add pricing information (see "Manual/Edited Pricing" on the facing page).

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Manual/Edited Pricing

There are some instances when, during a service save, a rate overlay screen may display. The reasons for this can be:

- The rate for the service has expired
- The rate for the service crosses a season boundary
- The rate requires manual pricing

The rate for the service has expired

In this case, the expired rate screen displays, showing the date the rate expired and (if set in INI settings) the amount that the rate has been automatically incremented.

In both cases, the rate(s) presented can be overridden.

The rate for the service crosses a season boundary

If a service is entered into a Booking where dates cross the season boundary, the Manual Rate Entry overlay screen stating “Service rate crosses season boundary” appears. Either accept or override the proposed rate in the overlay box.

The rates displayed are an average of the old rate and the new rate, prorated for the number of units in each period.

For example, if the service is for **3** nights (29 & 30 June and 01 July) and the rate of **100.00** expires 30 June and becomes **112.00**, then the calculation of the cross season rate is **((100.00 x 2) + (112.00 x 1) / 3)**; i.e. **200 + 112 = 312.00 / 3 = 104.00** per night.

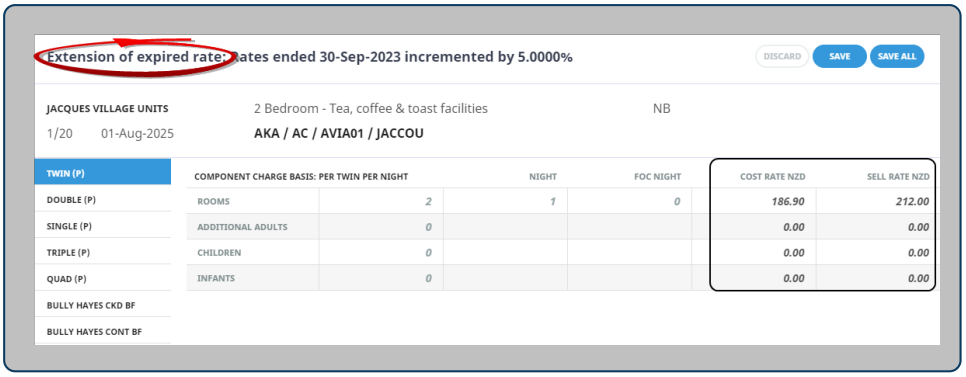
The rate requires manual pricing

This overlay screen displays if the product Date Range/Price Code/Rate Set has the Rate Status radio button set to *Manual*. This is common for services such as coach charters etc., where the cost of the service varies Booking-to-Booking and the supplier provides a quote for the Booking.

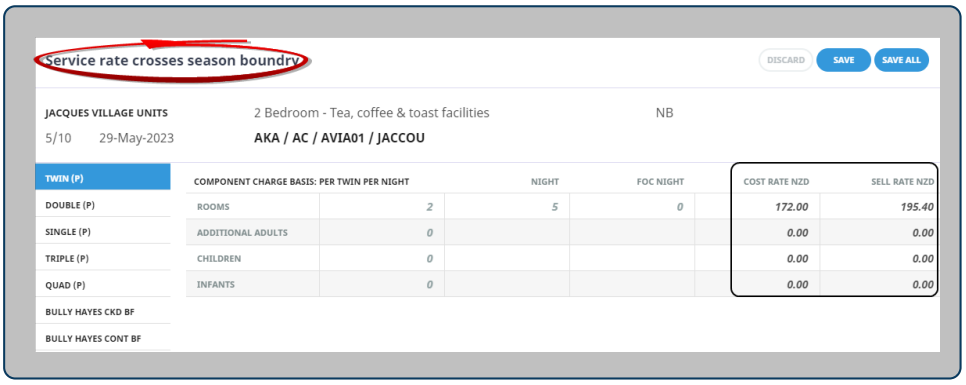
In this case, the rate fields in the overlay screen will all be **0.00**, and the quoted prices can be manually entered.

Add/Edit Manual Pricing for a Service Rate

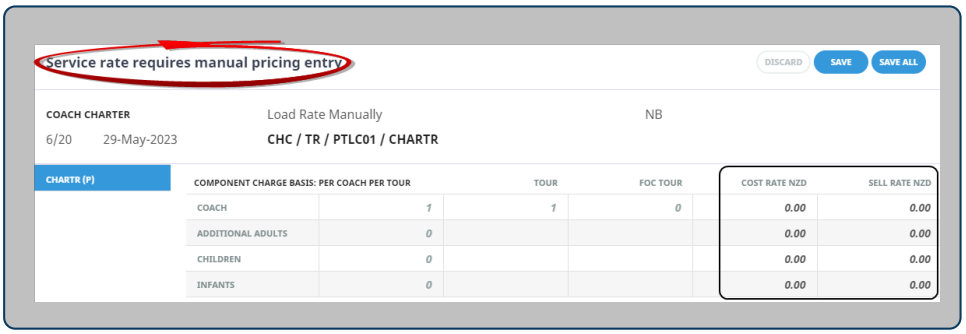
1. On the overlay screen that pops-up, enter (or edit) any manual rates needed into the relevant fields.
   - Extension of expired rate



   - Service rate crosses season boundary



   - Service rate requires manual pricing entry



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

   SAVE

3. Click **Discard** to discard all changes.
4. When you click Save, the Service Details screen is displayed. Make a final check of all field details and click *Save* once more. In particular, the appropriate service status can be entered or changed by selecting it from the drop-down list.
5. Finally, click **Exit** to return to the Itinerary view.

   EXIT

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CHAPTER 3

Managing Existing Group Bookings

The life-cycle of a Booking begins with its creation and it can then be revisited on many occasions before its natural end. A Booking can be recalled and updated any number of times for many different reasons.

This chapter covers working with existing Group Bookings and describes common tasks such as how to search for and retrieve a Booking, how to change basic Booking details, how to update the itinerary, how to add notes to a Booking and how to report on invoicing and documentation.

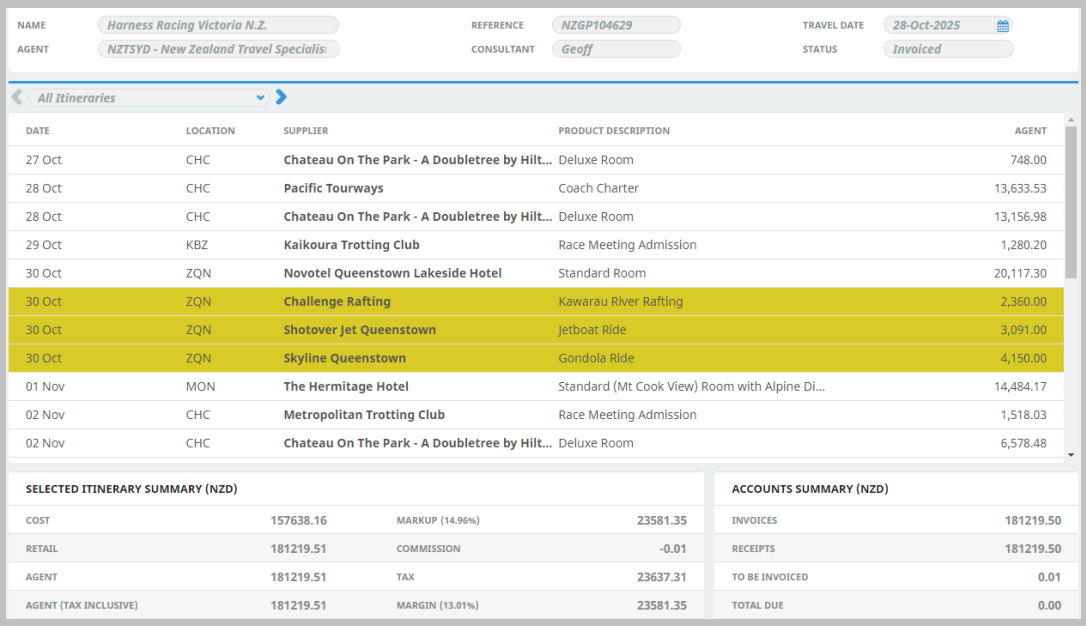
In this chapter ...

An Example Group Booking 46
Retrieve an Existing Group Booking 47
View Completed Group Booking 51
Add an Itinerary 54

An Example Group Booking

As explained in "Creating New Group Bookings" on page 19 of this user manual, the default view of an existing Booking is the Dashboard view, as shown in the example:

Completed Group Booking - Dashboard View



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialis	CONSULTANT	Geoff	STATUS	Invoiced

All Itineraries

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
27 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	748.00
28 Oct	CHC	Pacific Tourways	Coach Charter	13,633.53
28 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	13,156.98
29 Oct	KBZ	Kaikoura Trotting Club	Race Meeting Admission	1,280.20
30 Oct	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	20,117.30
30 Oct	ZQN	Challenge Rafting	Kawarau River Rafting	2,360.00
30 Oct	ZQN	Shotover Jet Queenstown	Jetboat Ride	3,091.00
30 Oct	ZQN	Skyline Queenstown	Gondola Ride	4,150.00
01 Nov	MON	The Hermitage Hotel	Standard (Mt Cook View) Room with Alpine Di...	14,484.17
02 Nov	CHC	Metropolitan Trotting Club	Race Meeting Admission	1,518.03
02 Nov	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	6,578.48

SELECTED ITINERARY SUMMARY (NZD)			
COST	157638.16	MARKUP (14.96%)	23581.35
RETAIL	181219.51	COMMISSION	-0.01
AGENT	181219.51	TAX	23637.31
AGENT (TAX INCLUSIVE)	181219.51	MARGIN (13.01%)	23581.35

ACCOUNTS SUMMARY (NZD)	
INVOICES	181219.50
RECEIPTS	181219.50
TO BE INVOICED	0.01
TOTAL DUE	0.00

These views are explained in more detail in the next section.

What next?

The tasks involved in managing an existing Group booking are organised into the following sections and chapters:

1. "Retrieve an Existing Group Booking" on the facing page - there are several ways to search for an existing booking, depending on the information you have about it.
2. "Working with Groups Booking Details" on page 59 - changing basic booking details includes general setup info, pax travelling and room configurations, markup and/or commission info and booking or agent notes. You can also copy and recalculate a booking.
3. "Working with Itinerary" on page 99 - changing the itinerary covers such things as pickup/dropoff details, voucher information, changing travel dates or times, viewing service/product notes and managing PCM details.
4. "Working with Operations and Accounts" on page 133 - the accounting information section covers tasks to do with viewing the tour window, invoicing, reporting and documentation. It also covers checking the message queue and adding/updating contact details.
5. "Creating Invoices" on page 137 - managing invoices is found under the Operations and Accounts View and covers creating three different types of invoice, including generating and emailing invoice documents.

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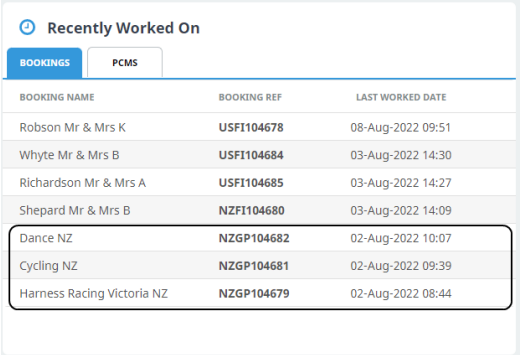
Retrieve an Existing Group Booking

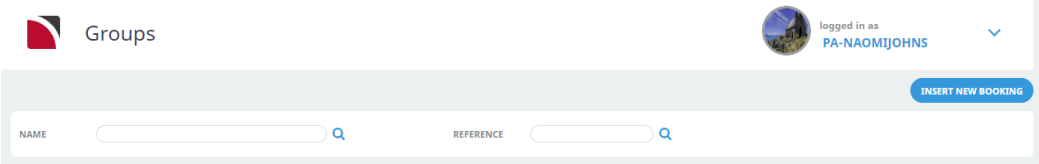
There are a number of ways to retrieve an existing Booking from the database:

1. From the Home page, in the **Recently Worked On** list (for Group bookings on which you have recently been working), click the *Bookings* tab and then click the relevant Booking to open it in Dashboard view.



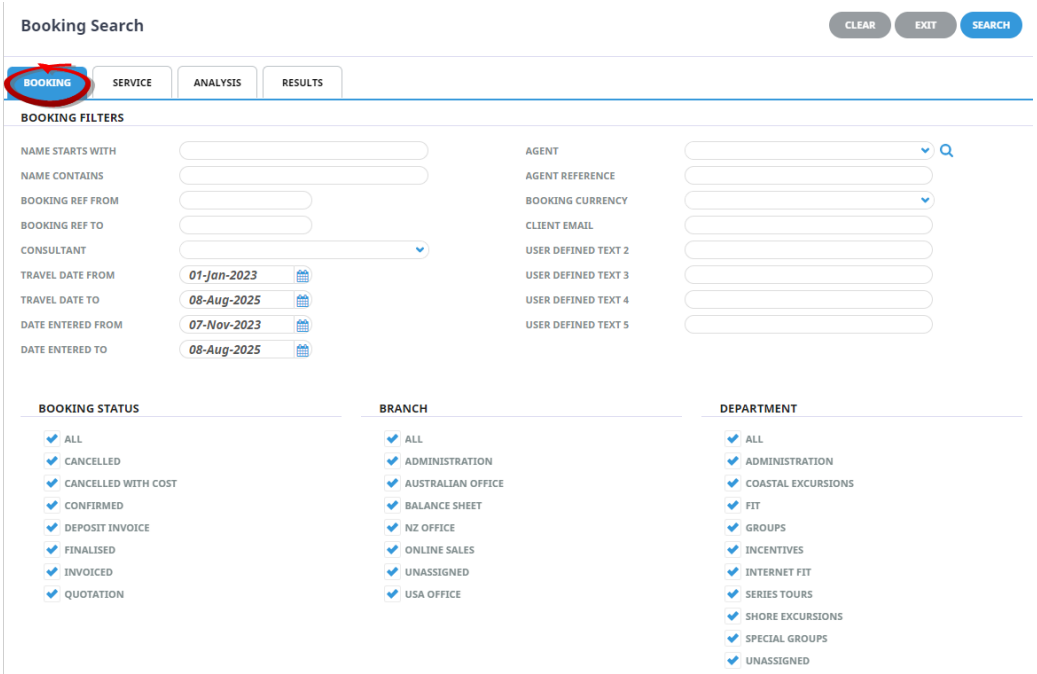
   a. Simply locate the item in the list and
   b. Click to open

2. From the **Groups home page**, using either the booking *Name* or booking *Reference* field.



   a. Enter the first few characters of either the booking *Name* or booking *Reference* and click the corresponding *Search* icon.
   b. From the Results list returned, click the Booking you want to open.

3. Or Using the full **Booking Search** screen Selection tab.



All three options are straightforward and intuitive.

The following procedure uses the full Booking Search option to demonstrate retrieving an existing Booking.

Retrieve an Existing Booking

1. From the Home page, select menu **Home > Bookings and Quotes > Groups**.

2. Leaving both Name and Reference fields blank, click either of the **Search icons** to open the full Booking Search screen.

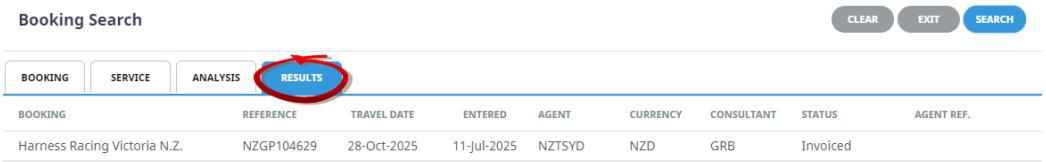
3. Enter search criteria in any of the search fields to refine your selection.

   NOTE: Don't forget about dates - results are returned within the date ranges set. For more information, see "About the Booking Search Fields" on the facing page.

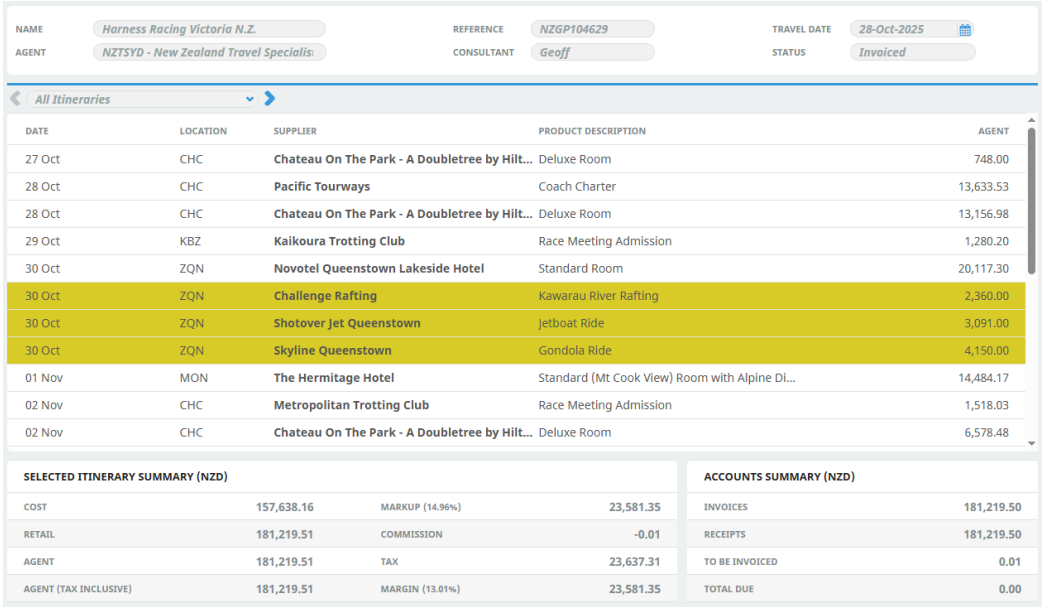
   a. Click one of the **Search buttons**.

4. Examine the list of **Results** and click a Booking to retrieve it.

   NOTE: Results are returned in the Results tab. If the Booking you are looking for is not in the list, go back to the Selection tab to adjust your search criteria.



5. The Booking is retrieved and displayed in the Groups **Dashboard View**.



© Tourplan, 2025

About the Booking Search Fields

- The capitalisation or case is irrelevant in the Booking header search; 'BROW' will return the same results as 'brow'.
- The results returned are also filtered based on the default Booking Travel Date From/To and Booking Date Entered From/To fields which display in the Results tab when multiple records are found. These default From/To date fields are controlled by the System INI settings DEF_BKG_TD_FROM_DATE (travel date filter) and DEF_BKG_FIND_FROM_DATE (Date Entered filter).

  NOTE: These INI settings apply to both PCMs and Bookings.

Name Starts With

This field will be empty. If you know the name of the Booking you can search for the start of the Booking name.

Name Contains

As with Name From, 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.

Booking Reference From/To

If the Booking Reference is known you can search by booking reference, however the full Booking Reference must be entered. Using the *From* and *To* fields for one Booking Reference will display one booking. Leaving the *To* field empty allows the search to display a range of bookings from the booking number used in the From field. A full list of bookings will display in numerical sequence for the date filters selected.

Consultant

Entering a consultant code will limit the search to Bookings for that consultant.

Travel Date From/To

This filter will list only Bookings with a header travel date between the specified dates. The default settings are 1 year prior to system date and 2 years after system date.

Date Entered From/To

This filter will list only Bookings with a Booking entered date between the specified dates. The default settings are 1 year prior to system date and 2 years after system date.

Agent

Selecting an agent will limit the search to only Bookings for that agent.

Agent Reference

Specifying the agent reference will limit the search to bookings with the specific agent reference.

Booking Currency

Specifying the currency will limit the search to Booking with the specific currency selected. A dropdown selection of available currencies will display using the dropdown arrow.

User Defined Fields

Five Booking User Defined text fields display, this example we have used a Quote Validity field. Some organisations have selected to use these fields as an additional search field such as a client email, or phone number - however this information is recorded in the Pax CRM against the pax contact fields.

Booking Status

Bookings can be filtered by selecting / deselecting the required Booking status code in the Multi-Select List Box.

NOTE:

- Multiple search criteria can be used at the same time e.g. search for all Bookings entered this month and travelling over the next two months and starting with the letters “har” for consultant GRB and Agent NZTSYD.
- The sort order of the resulting list of Bookings can be by any of the columns. The data can be sorted by double-clicking the column heading.

Branch / Department

Booking Branch and Department checkboxes by default all are checked. If the Booking Branch or Department is known, a filtered search can return results based on a specific Branch and/or Department search criteria.

Service Tab

Service Filters or a specific Service confirmation number including:

- Service Filters - Supplier, Service Date From and To, Confirmation Contains, Ticket Number, PNR Reference.
- Service Status (Multi Select List) - Specific service statuses can be checked to return results for the marked statuses.

Analysis Tab

Booking analysis fields can be used to filter Bookings by specific Booking analysis fields.

Results Tab

The results tab can be used to view a list of results, or the search button can be selected. Users can select column titles and column widths unique to their requirements. Please see " Appendix 1 - Scroll Column Headings" on page 168 to learn how to amend the column list.

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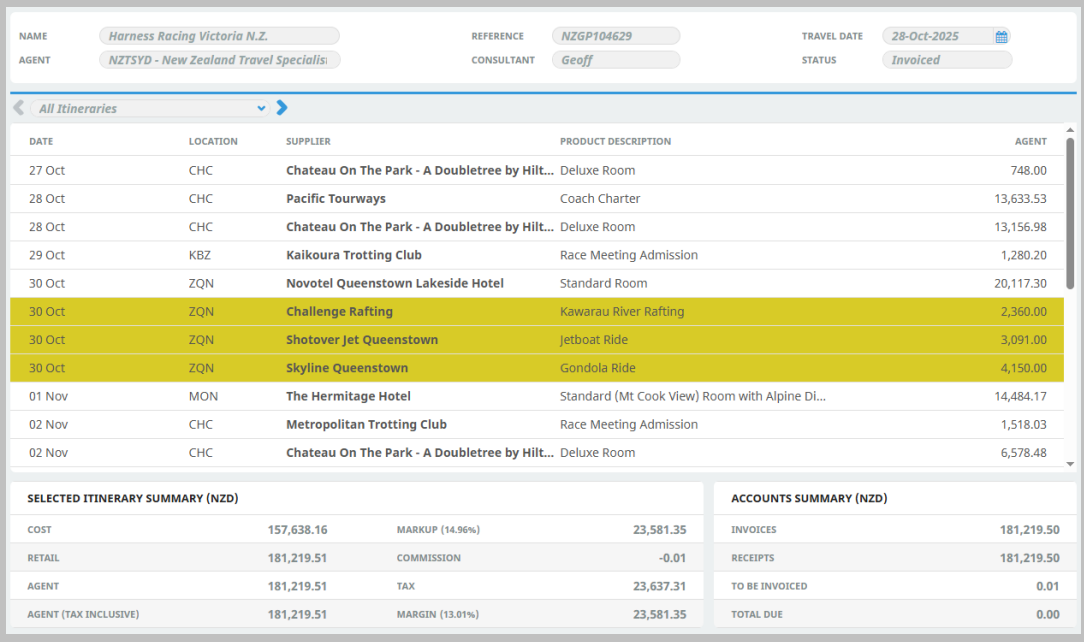
View Completed Group Booking

Dashboard View

The Dashboard View (*Groups* > *Dashboard*) is the default view of a new Booking once it's created and also the view shown when existing Bookings are searched for and retrieved.

Completed Group Booking - Dashboard View:



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialis	CONSULTANT	Geoff	STATUS	Invoiced

All Itineraries

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
27 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	748.00
28 Oct	CHC	Pacific Tourways	Coach Charter	13,633.53
28 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	13,156.98
29 Oct	KBZ	Kaikoura Trotting Club	Race Meeting Admission	1,280.20
30 Oct	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	20,117.30
30 Oct	ZQN	Challenge Rafting	Kawarau River Rafting	2,360.00
30 Oct	ZQN	Shotover Jet Queenstown	Jetboat Ride	3,091.00
30 Oct	ZQN	Skyline Queenstown	Gondola Ride	4,150.00
01 Nov	MON	The Hermitage Hotel	Standard (Mt Cook View) Room with Alpine Di...	14,484.17
02 Nov	CHC	Metropolitan Trotting Club	Race Meeting Admission	1,518.03
02 Nov	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	6,578.48

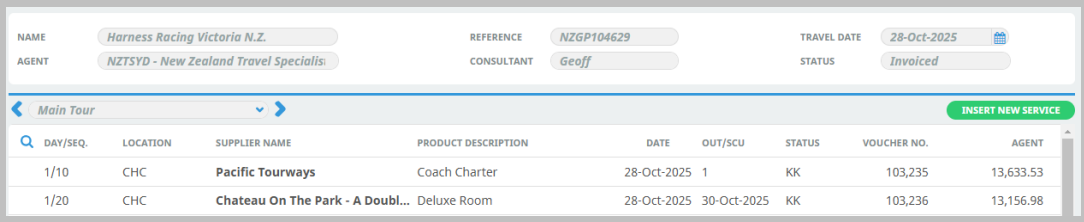
SELECTED ITINERARY SUMMARY (NZD)			
COST	157,638.16	MARKUP (14.96%)	23,581.35
RETAIL	181,219.51	COMMISSION	-0.01
AGENT	181,219.51	TAX	23,637.31
AGENT (TAX INCLUSIVE)	181,219.51	MARGIN (13.01%)	23,581.35

ACCOUNTS SUMMARY (NZD)	
INVOICES	181,219.50
RECEIPTS	181,219.50
TO BE INVOICED	0.01
TOTAL DUE	0.00

Itinerary View

The Itinerary View (*Groups* > *Itinerary*) displays all the services currently included in an existing Booking. If the number of services fills more than one page, use the right-hand scroll bar to navigate and view the full list.

Example: Completed Group Booking - Itinerary View



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialis	CONSULTANT	Geoff	STATUS	Invoiced

Main Tour — INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98

The screenshots show the Dashboard and Itinerary views of the new Group Booking created in this chapter. Additional services can be added by clicking *Insert New Service* (see "Add Services to a Group Booking" on page 32).

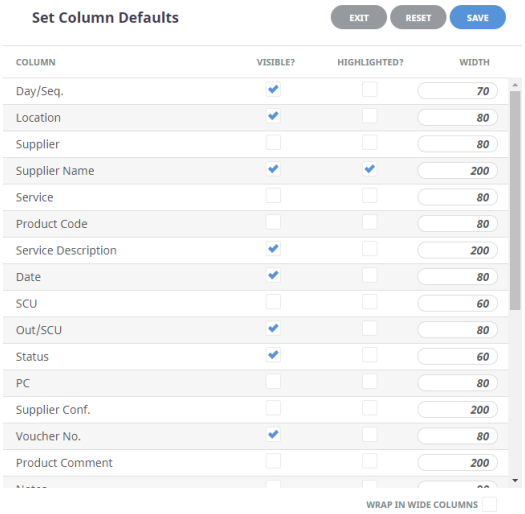
As well as reviewing existing details presented by these views, at any time during inserting services into the booking, a summary of the booking cost, selling price, markup, commission and tax can be viewed at the bottom of the Dashboard screen (where booking costs are organised into Itinerary Summary and Accounts Summary).

If there are multiple itineraries within one booking, selection of 'All Itineraries' or a specific itinerary can be viewed when selecting > or <.

About the Itinerary View Columns

NOTE:

- You can sort the list rows alphanumerically by clicking once on the heading label for any column. Click once again to sort in the reverse order.
- The columns listed below describe the default columns for the Itinerary view. Refer to Appendix 1 - Scroll Column Headings for a complete description of all columns available (including the default columns).
- To change the columns displayed, click once in any white space area in the list header, which displays the Set Column Defaults screen. In the **Set Column Defaults** screen, indicate via check-box which columns should be visible and/or highlighted. You can also set each column's width and wrap text in wide columns.



Day/Seq

The day number of each service and the sequence within the day as entered when the service was inserted. The sequence of each service determines the order in which it is displayed within the itinerary. By default the first service within each day is allocated sequence number 10 and subsequent services 20, 30, 40 etc.

Location

The location code for each service.

Supplier Name

The Supplier of each service.

Service Description

The description from the Product Database is displayed for each service.

Date

The start date of each service.

Out/SCU

This column will display the end date of the service.

However if service takes place within a day (e.g. entrances, meals, etc) this column will display the service quantity. Or more specifically the service Second Charge Unit quantity, hence the abbreviation SCU.

Status

The status of each service line. These two letter status codes are user-defined and must first be setup in **Home > System > Code Setup > Bookings > Service Status**. Service Status Codes can be changed by drilling down into the service line and using the drop-down on the Service Status field.

Voucher No.

This column displays the voucher number for each service (automatically generated by Tourplan).

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Agent

The total ‘Agent’ price of the service including any extras (breakfasts, etc.) which may be incorporated in the service. This figure is net of any agent commission that may be being paid.

Search Icon

There is a search icon located next to the column 'Day/Seq' heading. This allows users to quickly search the Itinerary application for an existing product. 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.

Add an Itinerary

An unlimited number of 'sub itineraries' can be added to a booking. These may be Pre and/or Post main tour arrangements, optional excursions, or even services for specific Pax etc.

The first itinerary name defaults to *Itinerary 1*, the second to *Itinerary 2* etc. These can be overwritten by typing the name into the Itinerary Name field under Itinerary Settings. When the *Save* button is clicked, the itinerary name updates the tab name.

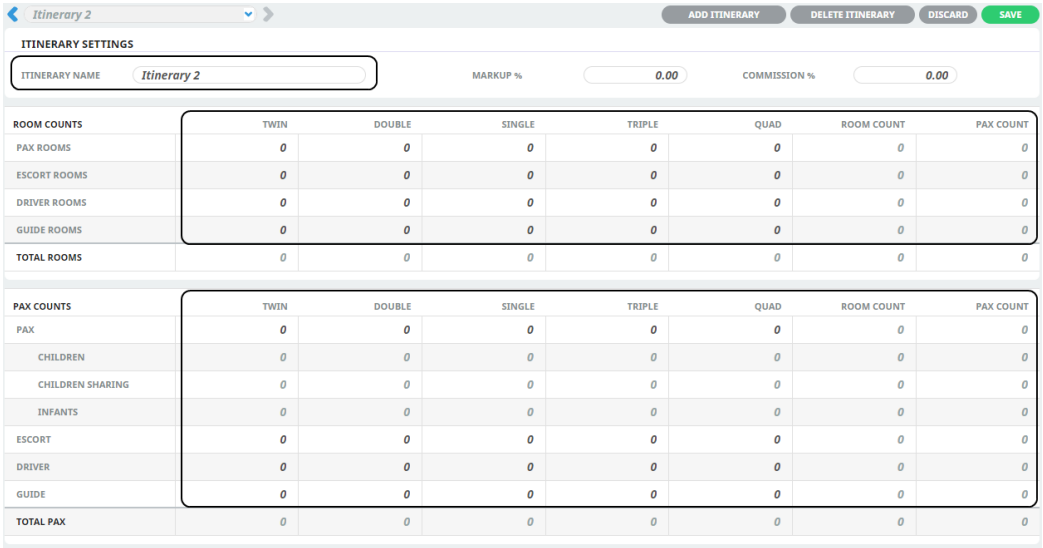
Add an Itinerary

1. Make sure the pax configuration screen is displayed (see "Set Pax Configurations" on page 23).

2. On the Pax Configurations screen, click **Add Itinerary**.

   ADD ITINERARY

3. For the **new itinerary** on the Pax Configurations screen, enter pax configuration details as required in the Itinerary Settings, Room Counts and Pax Counts sections.



In this example, A new Pax Configuration screen with **0** rooms and pax in it opens, pre-labelled ***Itinerary 2***. This label can be changed if required by over-typing the Itinerary Name field (up to 30 Chr).

Both itineraries (in this example *Main Tour* and *Itinerary 2*) are accessible by clicking the **<** and **>** arrows next to the itinerary name above Itinerary Settings. Alternatively, you can use the drop-down menu and choose one or the other.

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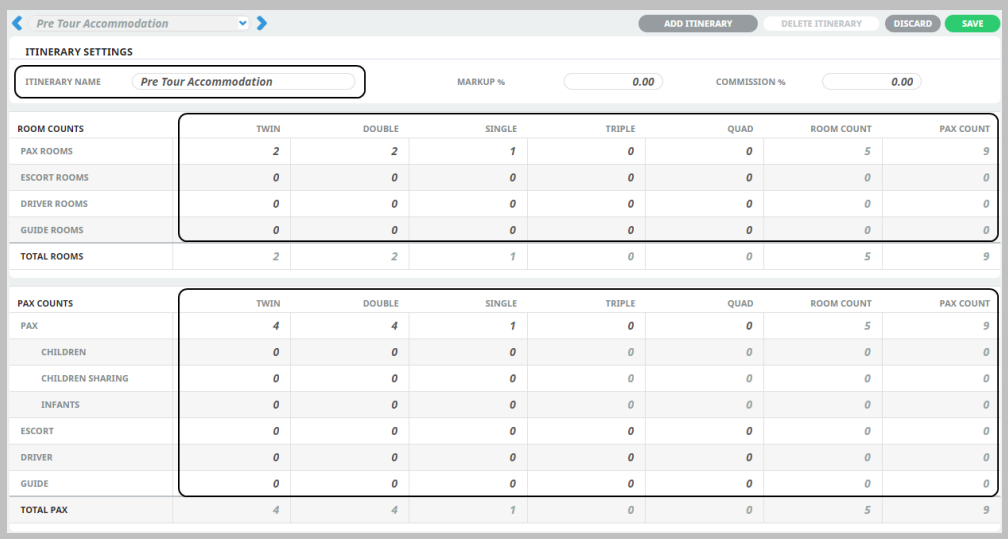
This example itinerary has been re-named ***Pre Tour Accommodation***.



NOTE: If a specific itinerary does not have any accommodation services in it (e.g., Optional Sight-seeing), the pax configuration should be *Single* rooms.

4. To keep the changes, click **Save**.
5. Click **Discard** to discard all changes.
6. When you are done with itineraries, continue to "Add Services to a Group Booking" on page 32, to add services for the new itinerary. Otherwise, make a selection from the Groups menu according to the type of information you need to update.

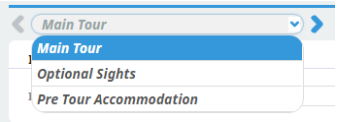
Deleting an Itinerary

NOTE: The **Delete Itinerary** button will be enabled when all services within the itinerary are removed.

To delete an itinerary, select the itinerary and click **Delete Itinerary**.

Selecting an Itinerary

To view the current list of itineraries (and optionally select one), click the **Itinerary list** drop-down.



When to Create Additional Itineraries?

A separate itinerary must be set up for each change in the number of pax using a service.

The Optional Sights Itinerary has an arbitrarily entered 10 pax in it. There are three Optional sight-seeing tours available on day 4. Some pax may decide to do all three, some may only do one.

The three optional services are:

- River Rafting - **236.00** pp
- Jet Boat Ride - **132.00** pp
- Gondola Ride - **32.00** pp

If (as an example) there are 8 pax on the River Rafting, 11 on the Jet Boat ride and 18 on the Gondola and the pax numbers are edited in each of the services, the following would be the result:

- 8 x 236.00 = **1888.00**
- 11 x 132.00 = **1452.00**
- 18 x 32.00 = **576.00**

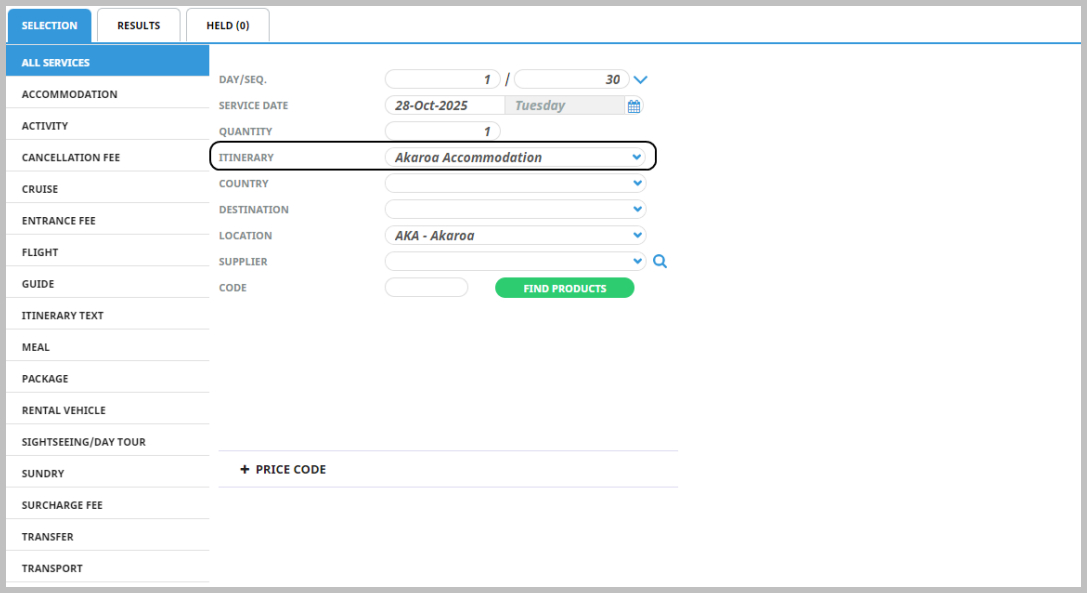
Total = 3916.00

3916.00 / 10 (the number of pax on the Optional Sights Itinerary) = **391.60** pp. It's quite probable that the 11 doing the Jet Boat don't include all of the 8 doing the rafting etc, so the costs are not being reflected accurately on a pp basis.

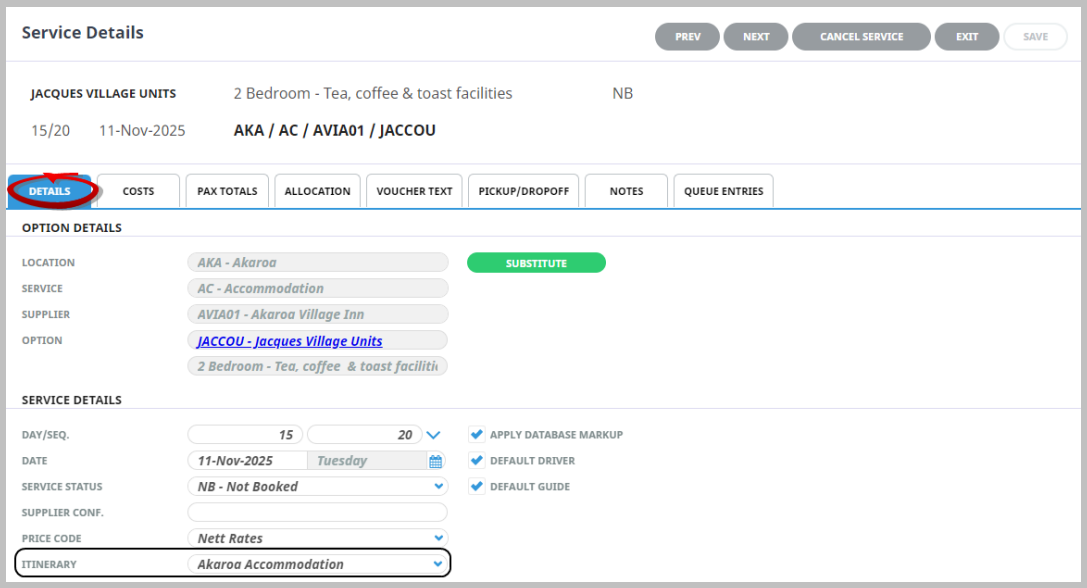
For this reason, pax quantity in the itinerary header must reflect the number of pax having the service (s) in that itinerary.

The following examples show how an accommodation service can be attached to a specific itinerary once the itinerary has been created.

Service Line Insert screen



Service Details screen



© Tourplan, 2025

NOTE: We suggest creating a separate itinerary, as numbers can be overridden in cost screens of services which in turn will display correctly if you do a line itemised itinerary.

For example, with the Optional Sightseeing, if 15 pax are doing the optional on day 2 and 20 pax are doing the optional on day 4, then a separate itinerary needs to be set up for each of those services. The reason is that the cost per person is always based on the number of pax in the booking header.

What Next?

The remaining topics in this chapter describe each of the options under the *Groups > Itinerary* menu.

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

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CHAPTER 4

Working with Groups Booking Details

Once created, group bookings need to be viewed, edited, added-to, reported-on and otherwise maintained. Tourplan NX groups these maintenance operations into three categories; Booking Details, Itinerary, and Operations and Accounts (there is another category at the top of the menu structure, called the *Dashboard*, but this is solely for viewing purposes - all fields in the Dashboard view are read-only, services can however be opened from this screen). Each category has a number of sub-categories that group related screens and fields together, enabling relevant management tasks to be carried out on the booking.

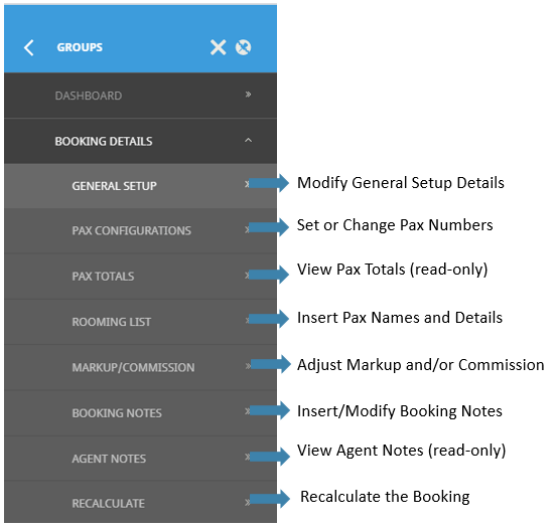
This chapter describes the functions and procedures related to maintaining *Booking Details*.

In this chapter ...

Booking Details View 60
General Setup - Group Bookings 61
Pax Configurations - Group Bookings 65
Pax Totals Group Bookings 69
Rooming List - Group Bookings 73
About the Rooming List Fields 80
Attaching List Configurations to Services 82
Markup / Commission - Group Bookings 84
Booking Notes 89
Agent Notes 93
Recalculate Booking 95
Copy Booking 97

Booking Details View

There are several places to change details for a Booking, depending on the type of information. The following graphic shows the Groups **Booking Details** menu matched with corresponding procedures in the Groups User Manual.



© Tourplan, 2025

General Setup - Group Bookings

This is the first of eight tasks described in this user manual for changing Booking details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the Booking, they might not all be needed.

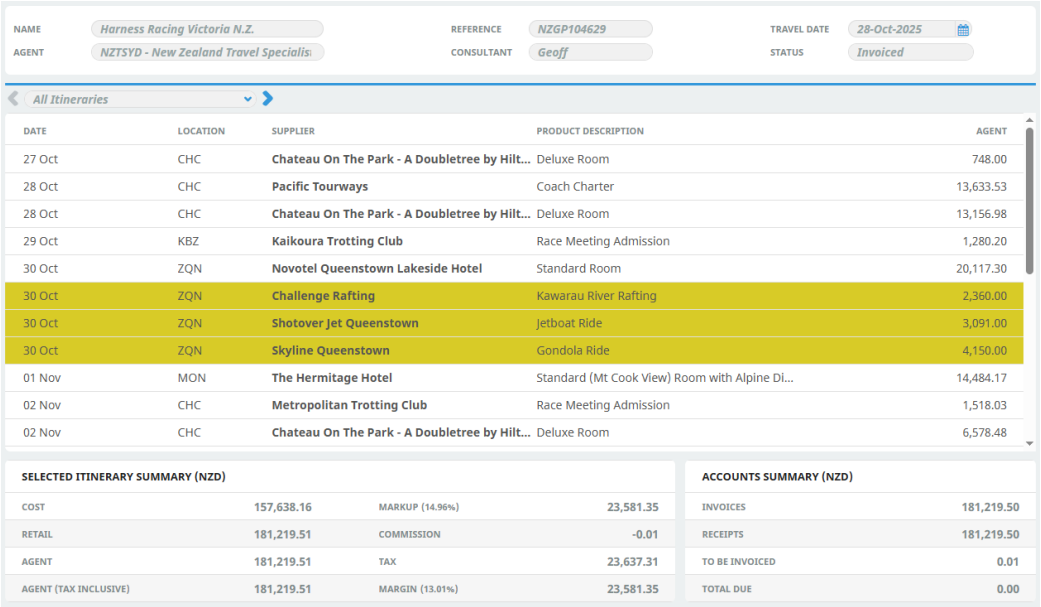
The full list is:

1. "General Setup - Group Bookings" above (this task)
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" on page 89
7. "Agent Notes" on page 93
8. "Recalculate Booking" on page 95

Modify General Setup Details

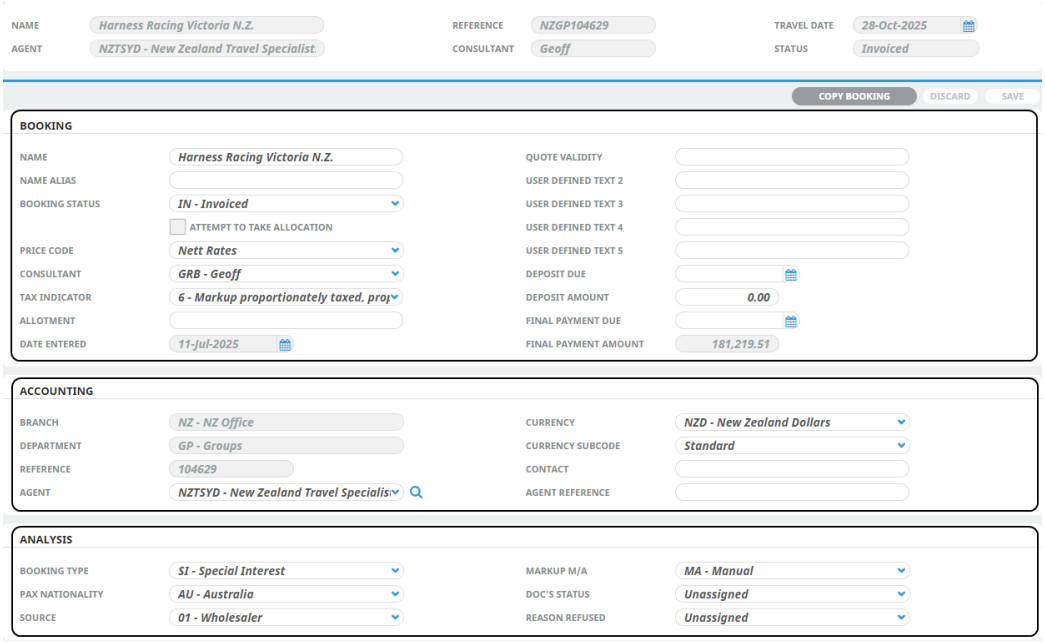
1. If you haven't already done so, search for and retrieve a Booking to work with (see "Retrieve an Existing Group Booking" on page 47).

2. The default view for a Booking is the **Dashboard View**.



To examine and change general setup details, from the Groups menu, select **Groups > Booking Details > General Setup**.

3. Examine the **Booking details** on this screen and change any as required.



4. To keep the changes, click **Save**.

5. Click **Discard** to discard all changes.

About the Booking Details - General Setup Fields

The Booking Details - General Setup screen contains a number of fields that are completed during the create Booking process (see "Create a Group Booking" on page 20). The majority of these fields can be altered here if necessary. Descriptions of the additional fields are covered below.

Header Section

Details in this section are dimmed-out (refer to "About the Create Booking Fields" on page 20 for more information on the details entered).

NOTE: Although these fields are dimmed-out (i.e. read-only) in the header, some may be editable in other sections. For example, the Booking name can be edited via the *Name* field in the Booking section.

Booking Section

Name

The name of the Booking. Used to identify and search for a Booking.

Name Alias

The Name Alias filed is an alternative name field to display a different name for the booking. Some Tourplan user companies may choose to use this field for messaging, displaying an alternative language for the booking name.

Booking Status

The status of the Booking can be changed here. There may be different status codes to indicate the various stages of the booking process – e.g., Working, Travelling, Invoiced, Finalised etc.

Attempt to Take Allocation

This field is used in conjunction with the Booking Status "Allocation" setting, the Service Status "Allocation" setting and the Allocation code(s) attached to the agent. The field can have different labels on it depending on the status of the booking and any services in it.

If the Booking Status is one that does not permit allocations, the label will read “Release Allocation Currently Held”. This means that if there are services in the booking that have had allocation taken, when the booking status is changed to one that does not allow allocations, then checking the box will release the allocation. The checkbox will only be available if there is allocation to release.

When the Booking Status is changed to one that does allow allocations, the system will test the existing services that a) have a Service Status that allows allocations and b) there are enough rooms in the allocation (s) for the service. If these conditions are met (and the agent is entitled to use allocation), then this field will

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become active and the label will change to "Attempt to Take Allocation" and can be checked/unchecked as necessary. If checked, the system will attempt to automatically take allocations for the services which have already been entered.

NOTE: If a Quotation is being created in Groups, the Quote booking status attached should have the allocations flag set to 'N'; i.e. to *not* take allocations for the quote

Price Code

This field must be left blank if the system is to use the Price Codes and defaults which are setup for the agent attached to the Booking. It should only be filled in if Price Code settings normally used for this agent need to be overridden. The fact that the field is blank, is in effect saying that the system is going to use the Agent default Price Code(s).

Consultant

The code and name of the person entering this Booking. This value is normally defaulted from the User's details as defined in the Groups INI settings.

Tax Indicator

Normally defaulted to the tax indicator set against the Agent in Debtors. This field is used to determine how tax on Mark-ups and Commissions is handled.

Allotment

This field is only used if the allocation settings in Debtors for this agent are to be overridden. To override the default settings, type in the Allocation Split Code that is to be used for the booking.

Date Entered

Creation date of booking – automatically updated by Tourplan. An INI setting determines whether or not this value can be altered. If the date is dimmed out, it cannot be changed.

User-Defined Text (fields) 1-5

There are five user defined booking header text fields, each available in the booking header. The data in these fields can be output on Tourplan messages. In the example on Booking Detail Screen, only one label (*Quote Validity*) has been defined.

> The next four fields can be used to apply deposit payment requirements for a booking, these fields are not bound to service line deposit invoices which a supplier may require to secure the service. These fields allow Tourplan users to communicate their own booking deposit information irrespective of supplier deposit requirements. There are specific messaging substitution codes to support the generation of data from these fields.

Deposit Due

The date that the agent is required to pay a deposit for the booking.

Deposit Amount

The amount of the deposit required.

Final Payment Due

The date that the agent is due to make the final payment for the booking.

Final Payment Amount

The balance of the booking value that is due on the Final Payment Due date.

Accounting Section

Branch/Department/Reference

The displayed values are from the initial Booking Header set up.

The Reference field can never be changed. The Branch/Department fields can be changed provided there are no accounting transactions against the booking.

Agent

The agent as entered in the booking set up displays and can be changed if required.

If the agent is changed after services have been added to the booking, a recalculation option dialogue will display asking if the booking should be recalculated.

Currency

The defaulted Booking currency can be changed in this field if required (see "About the Create Booking Fields" on page 20).

NOTE: Changing the currency will force a recalculation of the Booking costs.

(Currency) Subcode

The defaulted currency Subcode can be changed in this field if required.

NOTE: Changing the currency subcode will force a recalculation of the Booking costs.

Contact

Agent contact name for this booking. May optionally be listed on agent messages.

Agent Reference

Any reference provided by the agent can be entered here. This field can be output on agent messages.

Analysis Section

Analysis Codes 1 – 6

These displayed values are from the initial header set-up and can be changed here if necessary. The labels may have been changed via *Home* > *Code Setup* > *INI Settings* > *System*.

Changing any of these fields will trigger a re-calculation.

Buttons

Copy Button - This button allows users to copy the booking, for more information on copying a booking see the topic called "Copy Booking" on page 97..

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Pax Configurations - Group Bookings

This is the second of eight tasks described in this user manual for changing booking details.

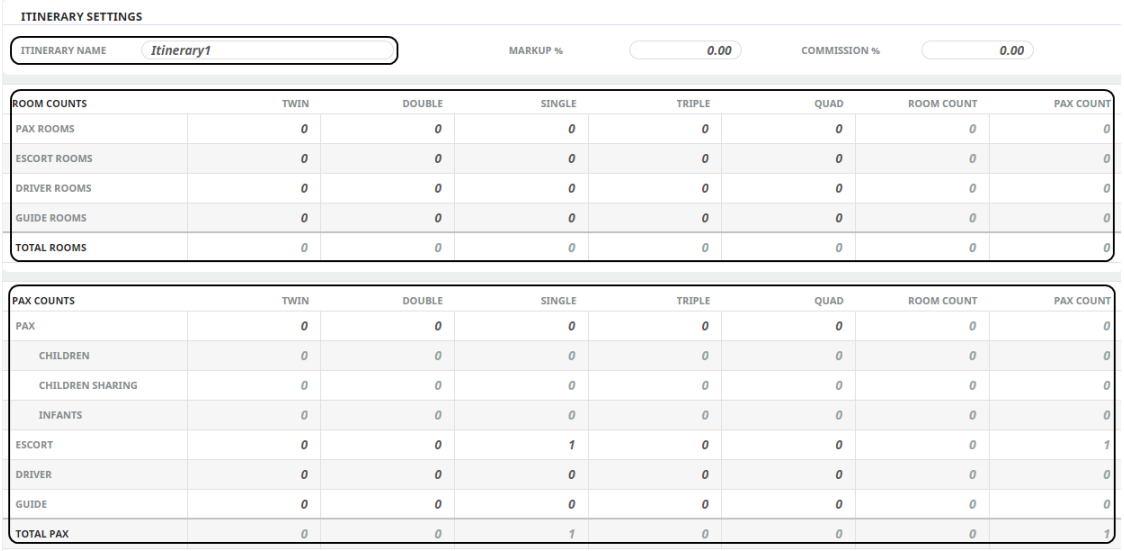
NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" above (this task)
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" on page 89
7. "Agent Notes" on page 93
8. "Recalculate Booking" on page 95

The Pax Configurations screen can be used to:

- Adjust pax numbers - adjust passenger, children, escort, driver and guide numbers.
- Add itineraries - add additional itineraries to the booking.
- Adjust mark-up and commission - adjust mark-up and commission percentages per itinerary.



ITINERARY SETTINGS

ITINERARY NAME: Itinerary1 | MARKUP %: 0.00 | COMMISSION %: 0.00

ROOM COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX ROOMS	0	0	0	0	0	0	0
ESCORT ROOMS	0	0	0	0	0	0	0
DRIVER ROOMS	0	0	0	0	0	0	0
GUIDE ROOMS	0	0	0	0	0	0	0
TOTAL ROOMS	0	0	0	0	0	0	0

PAX COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX	0	0	0	0	0	0	0
CHILDREN	0	0	0	0	0	0	0
CHILDREN SHARING	0	0	0	0	0	0	0
INFANTS	0	0	0	0	0	0	0
ESCORT	0	0	1	0	0	0	1
DRIVER	0	0	0	0	0	0	0
GUIDE	0	0	0	0	0	0	0
TOTAL PAX	0	0	1	0	0	0	1

Adjust Pax Numbers

Changing Pax numbers automatically updates the room count for the column that the pax change is made in. When the change is made and Save is clicked, the Recalculate Booking dialogue will display.

The recalculation does more than just recalculate the services; it also tests that any room policies (not age policy) are still being met, FOC thresholds are still valid etc.

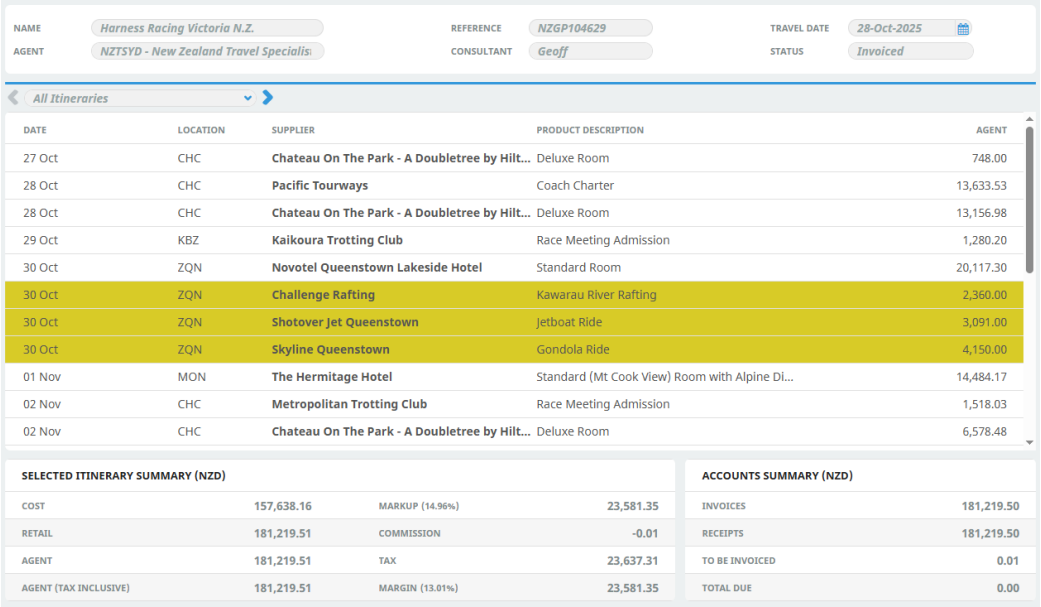
The recalculate dialogue has radio buttons and check boxes to indicate what processes should be followed. Its at this point that users can select how the pax in the existing services are dealt with and how the costs in the existing services are dealt with. More detail on the recalculation options are provided below.

NOTE: The term 'Pax' in this user manual refers collectively to Pax, (Adults & Children), Escorts, Drivers & Guides.

Set or Change Pax Numbers

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. The default view for a booking is the **Dashboard View**.



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialis	CONSULTANT	Geoff	STATUS	Invoiced

All Itineraries

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
27 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	748.00
28 Oct	CHC	Pacific Tourways	Coach Charter	13,633.53
28 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	13,156.98
29 Oct	KBZ	Kaikoura Trotting Club	Race Meeting Admission	1,280.20
30 Oct	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	20,117.30
30 Oct	ZQN	Challenge Rafting	Kawarau River Rafting	2,360.00
30 Oct	ZQN	Shotover Jet Queenstown	Jetboat Ride	3,091.00
30 Oct	ZQN	Skyline Queenstown	Gondola Ride	4,150.00
01 Nov	MON	The Hermitage Hotel	Standard (Mt Cook View) Room with Alpine Di...	14,484.17
02 Nov	CHC	Metropolitan Trotting Club	Race Meeting Admission	1,518.03
02 Nov	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	6,578.48

SELECTED ITINERARY SUMMARY (NZD)

COST	157,638.16	MARKUP (14.96%)	23,581.35
RETAIL	181,219.51	COMMISSION	-0.01
AGENT	181,219.51	TAX	23,637.31
AGENT (TAX INCLUSIVE)	181,219.51	MARGIN (13.01%)	23,581.35

ACCOUNTS SUMMARY (NZD)

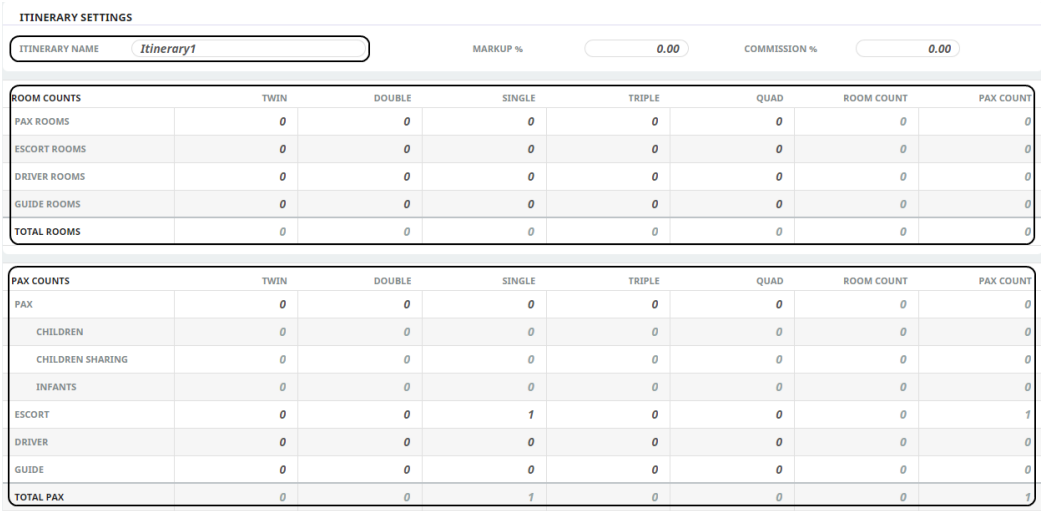
INVOICES	181,219.50
RECEIPTS	181,219.50
TO BE INVOICED	0.01
TOTAL DUE	0.00

To examine and change pax travelling or room configuration details, from the Groups menu, select **Groups > Booking Details > Pax Configurations**.

3. Select the itinerary you want to work with. To add a new itinerary, see "Add an Itinerary" on page 54.

   NOTE: Most bookings have only one itinerary. For example, the screenshot below has a single itinerary called ***Main Itinerary***.

4. Examine the **pax numbers** in the various room options and update as required.



ITINERARY SETTINGS

ITINERARY NAME: Itinerary1 | MARKUP %: 0.00 | COMMISSION %: 0.00

ROOM COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX ROOMS	0	0	0	0	0	0	0
ESCORT ROOMS	0	0	0	0	0	0	0
DRIVER ROOMS	0	0	0	0	0	0	0
GUIDE ROOMS	0	0	0	0	0	0	0
TOTAL ROOMS	0	0	0	0	0	0	0

PAX COUNTS	TWIN	DOUBLE	SINGLE	TRIPLE	QUAD	ROOM COUNT	PAX COUNT
PAX	0	0	0	0	0	0	0
CHILDREN	0	0	0	0	0	0	0
CHILDREN SHARING	0	0	0	0	0	0	0
INFANTS	0	0	0	0	0	0	0
ESCORT	0	0	1	0	0	0	1
DRIVER	0	0	0	0	0	0	0
GUIDE	0	0	0	0	0	0	0
TOTAL PAX	0	0	1	0	0	0	1

NOTE: This procedure focuses on changing pax numbers only - other procedures cover adding additional itineraries and modifying markup and commission details.

5. On the **Recalculate Booking** screen, select the options required according to "Recalculate Booking Options " on the facing page (generally, the default options are fine).

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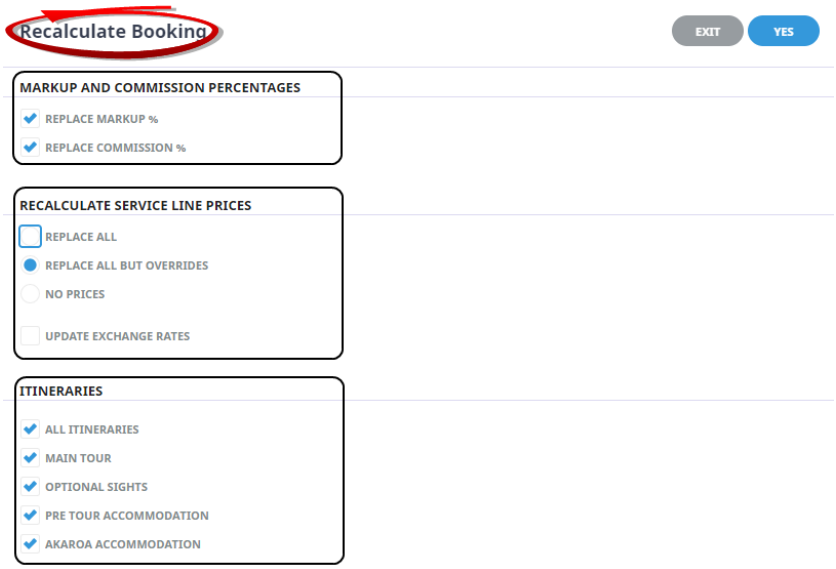

6. To keep the changes, click **Yes**.

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

8. Once you click *Yes*, the pax configuration changes are saved.

   NOTE: Some services may require manual pricing - if this is the case, an overlay screen appears and you will need to manually add or edit pricing information (see "Manual/Edited Pricing" on page 43).

Recalculate Booking Options

The selection of the radio buttons and check boxes will determine how the existing services operate when the re-calculation is performed.

Copy New Pax Details Into Service Lines

These selections trigger how the pax in the existing services are dealt with.

Replace All

Choosing this option means that any amendments made to pax quantities at the service line level will be overridden with the updated pax count from the Pax Configuration screen. (In other words the pax quantities will be replaced with the new pax configurations).

> The number of adults, children, infants etc. can be edited. However, when the service is one whose price is *Per Person*, the service price per person will adjust. The cost per person is **always** based on the number of pax in the Booking Header (for the Itinerary that the service is attached to).

> As an example (and leaving children out of the equation for now), assume the service at Day 9 / Seq. 20 has a PP cost of **94.00**. This is calculated **42 adults * 94.00 = 3948.00 / 42 = 94.00** per person. If the number of adults was changed in the service line to **20**, the calculation would be **20 adults * 94.00 = 1880.00 / 42** adults (the number of pax in the Booking Header) = **44.76** per person.

*Replace Defaulted **(Default)***

This is very similar to Replace All, except that if the service line pax quantities were the same as the original pax configuration (i.e. before you changed them) then update the service line to the new pax quantities.

No Change

Selecting this option will recalculate the booking totals based on existing service line and booking header quantities. This will not apply the new pax quantities in the header of the existing service lines.

Recalculate Service Line Prices

Replace All

This option will replace all service line costs with values from the Product Database. This means any overridden or manual prices will be re-set to their original values. Replace all will update the costs in the service line regardless of the current service line values.

Replace All But Overrides

As for Replace All, except any manually entered or overridden costs are preserved. Confirmation of overridden or manual prices is required.

No Prices

This option will not update any prices on the existing service lines if the pax configurations have not changed.

Update Exchange rates

This check-box can be used to update the booking values with any changes in exchange rates between service and booking currencies.

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Pax Totals Group Bookings

This is the third of eight tasks described in this user manual for changing booking details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" above (this task)
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" on page 89
7. "Agent Notes" on page 93
8. "Recalculate Booking" on page 95

At any time during the process of inserting services into a booking, a summary of the total booking cost, selling price, mark-up, commission and tax for any itinerary can be viewed via the Pax Totals screen.

If the book on feature has been used, the group booking will detail the pax totals for all FIT bookings rolled into the group booking.

NOTE: None of the values on this screen can be edited - they are display-only for the itinerary currently selected.

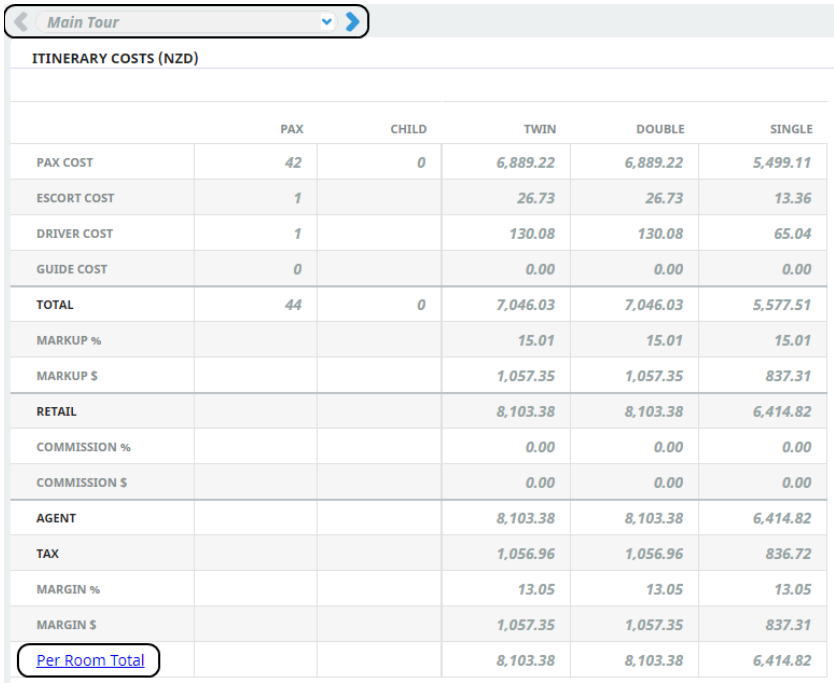
View Pax Totals (Read-Only)

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. The default view for a booking is the **Dashboard View**.

   To view pax totals, from the Groups menu, select **Groups > Booking Details > Pax Totals**.

3. On the **pax totals** screen, examine the values for the itinerary currently selected (this one is Main Tour - Per Room Total).



Main Tour

ITINERARY COSTS (NZD)

	PAX	CHILD	TWIN	DOUBLE	SINGLE
PAX COST	42	0	6,889.22	6,889.22	5,499.11
ESCORT COST	1		26.73	26.73	13.36
DRIVER COST	1		130.08	130.08	65.04
GUIDE COST	0		0.00	0.00	0.00
TOTAL	44	0	7,046.03	7,046.03	5,577.51
MARKUP %			15.01	15.01	15.01
MARKUP $			1,057.35	1,057.35	837.31
RETAIL			8,103.38	8,103.38	6,414.82
COMMISSION %			0.00	0.00	0.00
COMMISSION $			0.00	0.00	0.00
AGENT			8,103.38	8,103.38	6,414.82
TAX			1,056.96	1,056.96	836.72
MARGIN %			13.05	13.05	13.05
MARGIN $			1,057.35	1,057.35	837.31
Per Room Total			8,103.38	8,103.38	6,414.82

NOTE: Click the link at the bottom to switch between Per Room Total and Per Person Total.

In addition to the above for Main Tour - Per Room Total, the following examples show room and person totals for different itineraries in the booking:

» **Main Tour - Per Person Total**.

Main Tour

ITINERARY COSTS (NZD)

	PAX	CHILD	TWIN	DOUBLE	SINGLE
PAX COST	42	0	3,444.61	3,444.61	5,499.11
ESCORT COST	1		13.36	13.36	13.36
DRIVER COST	1		65.04	65.04	65.04
GUIDE COST	0		0.00	0.00	0.00
TOTAL	44	0	3,523.01	3,523.01	5,577.51
MARKUP %			15.01	15.01	15.01
MARKUP $			528.68	528.68	837.31
RETAIL			4,051.69	4,051.69	6,414.82
COMMISSION %			0.00	0.00	0.00
COMMISSION $			0.00	0.00	0.00
AGENT			4,051.69	4,051.69	6,414.82
TAX			528.48	528.48	836.72
MARGIN %			13.05	13.05	13.05
MARGIN $			528.68	528.68	837.31
Per Person Total			4,051.69	4,051.69	6,414.82

» **Pre Tour Accommodation - Per Room Total**.

Pre Tour Accommodation

ITINERARY COSTS (NZD)

	PAX	CHILD	TWIN	DOUBLE	SINGLE
PAX COST	7	0	187.00	187.00	187.00
ESCORT COST	0		0.00	0.00	0.00
DRIVER COST	0		0.00	0.00	0.00
GUIDE COST	0		0.00	0.00	0.00
TOTAL	7	0	187.00	187.00	187.00
MARKUP %			0.00	0.00	0.00
MARKUP $			0.00	0.00	0.00
RETAIL			187.00	187.00	187.00
COMMISSION %			0.00	0.00	0.00
COMMISSION $			0.00	0.00	0.00
AGENT			187.00	187.00	187.00
TAX			24.39	24.39	24.39
MARGIN %			0.00	0.00	0.00
MARGIN $			0.00	0.00	0.00
Per Room Total			187.00	187.00	187.00

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Pre Tour Accommodation - Per Person Total.

Pre Tour Accommodation

ITINERARY COSTS (NZD)

	PAX	CHILD	TWIN	DOUBLE	SINGLE
PAX COST	7	0	93.50	93.50	187.00
ESCORT COST	0		0.00	0.00	0.00
DRIVER COST	0		0.00	0.00	0.00
GUIDE COST	0		0.00	0.00	0.00
TOTAL	7	0	93.50	93.50	187.00
MARKUP %			0.00	0.00	0.00
MARKUP $			0.00	0.00	0.00
RETAIL			93.50	93.50	187.00
COMMISSION %			0.00	0.00	0.00
COMMISSION $			0.00	0.00	0.00
AGENT			93.50	93.50	187.00
TAX			12.20	12.20	24.39
MARGIN %			0.00	0.00	0.00
MARGIN $			0.00	0.00	0.00
Per Person Total			93.50	93.50	187.00

4. When you are done, make another selection from the Groups menu, or click **Exit** to return to the Groups search and retrieval screen.

EXIT

About the Pax Totals Fields

The columns display the number of Pax, number of Children and the booking values for Twin, Double, Single and Triple room types. Room types that do not have pax entered against them in Pax Configurations display pricing as 0.00.

Number	Explanation
Pax Cost	The per person or per room cost price each Pax will pay for the entire group.
Escort Cost	The amount that each pax is paying toward the escorts costs.
Driver Cost	The amount that each pax is paying toward the drivers costs.
Guide Cost	The amount that each pax is paying toward the guides costs.
Total	The sum of Pax Cost + Escort Cost + Driver Cost + Guide Cost.
Markup %	Mark-up expressed as a percentage (includes both Product mark-up and Booking mark-up)
Markup $	Mark-up expressed as a percentage (includes both Product mark-up and Booking mark-up)
Retail	Total Cost plus Markup $.
Commission %	Travel Agent's commission expressed as a percentage.
Commission $	Travel Agent's commission expressed as a monetary amount.
Agent	Retail Cost minus Commission $.
Tax	The separated out tax amount.
Margin %	Margin expressed as a percentage and is the difference between the selling price and the cost price displayed as a % price
Margin $	Margin expressed as a monetary amount and is the difference between the selling price and the cost price displayed as a $ amount.
Per Room/Person Total	The Booking Total per room or person (adult), whichever is selected.

NOTE: Where there is a tax amount and the Agent Cost and the Per Person Total are the same, the tax basis of the system will have been set to *Inclusive*. In systems where the Per Person Total is the sum of the Agent Cost (pp) plus the tax amount, the tax basis of the system will have been set to *Exclusive*.

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Rooming List - Group Bookings

This is the fourth of eight tasks described in this user manual for changing booking details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" above (this task)
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" on page 89
7. "Agent Notes" on page 93
8. "Recalculate Booking" on page 95

The Rooming List screen allows Passenger Names to be entered against the booking, using the "Pax Names" option. Names can also be imported from a spreadsheet in a specific csv (comma separated values) format (see "Importing Pax Names and Details" on page 76).

Names are assigned to Rooms and then to Lists and different lists can be created (e.g. for different itineraries or services) using List Configuration.

Pax Tab - Entering Pax Names and Details Manually

There can be multiple Lists per booking for different booking combinations if required; e.g. per booking Itinerary, per Service Type etc. The following procedure describe how to enter pax names and details manually.

NOTE: It is also possible to import pax information from a csv file, which is described in "Importing Pax Names and Details" on page 76.

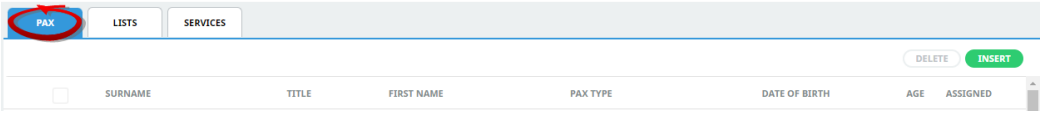
Pax - Insert Pax Names and Details

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. The default view for a booking is the **Dashboard View**.

   To create rooming lists with individual pax names and details, from the Groups menu, select **Groups > Booking Details > Rooming List**.

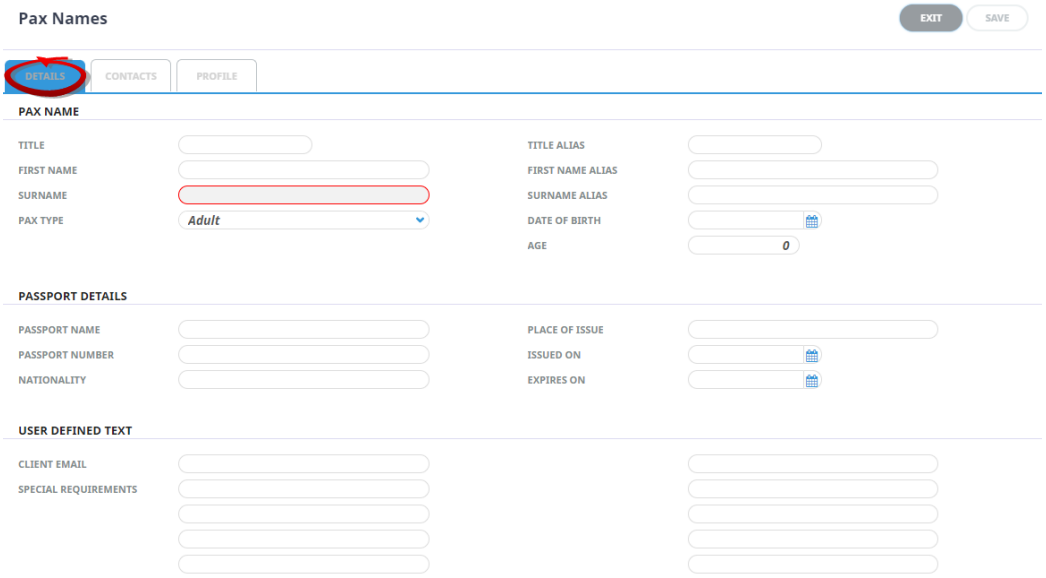
3. Examine the **Rooming List (PAX)** tab.

   NOTE: There are three tabs available from the Rooming List screen: PAX, LISTS and SERVICES. The default view is the PAX tab and the list will be empty on first view of the rooming list for a booking.

4. Click **Insert** to enter pax details.

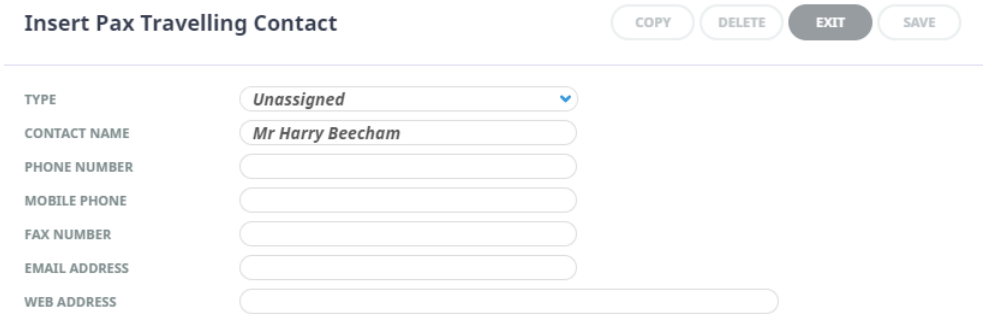
5. On the **Pax Details** screen, enter information about the first pax in this rooming list.



6. **NOTE:** This step is optional. Once a Surname is entered, the Insert button for the Contacts section becomes available:

   a. Click the Contacts **Insert** button to enter pax details.

   b. On the **Insert Pax Travelling Contact** screen, enter contact information for the current pax (the contact name is populated from the Pax Details screen).

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

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

7. On the Pax Details screen:

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

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

8. Repeat steps 4 - 7 for additional pax in this rooming list.

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About the Pax Details Fields

Pax Name

Title , First Name, Surname

The Save button becomes live once a Surname is entered.

NOTE: For individual pax names to be listed on various Tourplan generated documents such as vouchers, the names of each passenger must be entered here.

Pax Type

Choose the appropriate selection from the drop-down list.

Title Alias, First Name Alias, Surname Alias

Alias fields allow alternative client names to be entered, a case for using these fields may be to output client names using an alternative language.

NOTE: For individual pax names to be listed on various Tourplan generated documents such as vouchers, the names of each passenger must be entered here and the message template will need to be coded to output alias names fields for more information on substitution codes please see the Messaging User Manual.

Date of Birth, Age

Enter either Date of Birth (in day/month/year format) or Age.

NOTE:

- Product Database Age Policies are not validated in Groups. Any Date of Birth/Age is information only and can be output on documentation/messages etc.
- Ages can be entered as either Date of Birth or Age. When an Age is entered, the date of birth is calculated as the booking travel date less the age in years.
- 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 Settings. By default, Windows interprets 2 digit years as being between 1930 and 2029. If a DOB is entered which is prior to 1930, it is calculated as 100 years later; e.g. 1927 is calculated as 2027.

Passport Details

The information stored in fields in the Passport Details section is self-explanatory.

User Defined Text

These fields have been coded in Code Setup (in this example) to record a client email address and to record any special requirements the pax may have. User systems may have different headings and there are 10 fields which can be coded to record specific information about your passengers.

Client Email

Passenger email address.

Special Requirements

Some companies may use multiple fields to record information in this example fields 2-5 are available to enter notes that are specific to the passenger.

Contacts Tab

Contact details can be added for each passenger using the green *Insert* button as described in step 4 of "Import a Rooming List" on the next page.

Contact Type

This is a drop-down list populated from data entered via menu *Home* > *Code Setup* > *Messaging* > *Contact Type*. Select the relevant type of contact.

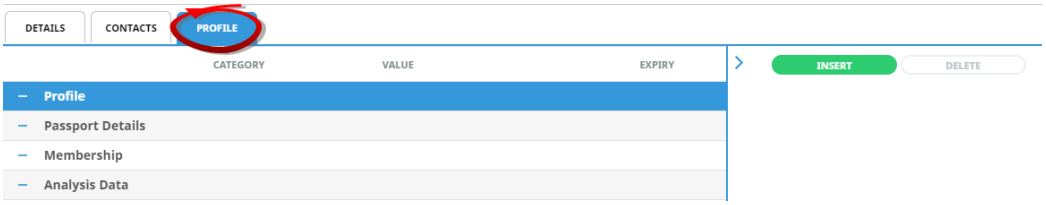
Apart from Contact Type, the information stored in fields in the Contacts section is self-explanatory.

Recording Profile Information

Profile information could include Special Diets, Passport Information, noting Membership numbers such as frequent flyer membership, and or specific Analysis Data.

Adding Profile Information Per Passenger

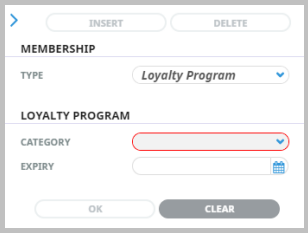
1. From the Pax Details screen, select the **Profile Tab**.



2. Profile headings will show in a list to the left of the screen. Highlight the Profile tab and click **Insert**.

3. Select a Profile **Type** and complete the required fields.

This example is for a membership loyalty program.



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

Importing Pax Names and Details

Names can be imported from a csv (comma separated values) text file. For an example csv file, see "About the Rooming List Fields" on page 80.

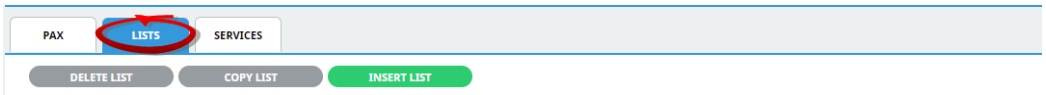
Import a Rooming List

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. The default view for a booking is the **Dashboard View**.

   To import a rooming list from a csv file, from the Groups menu, select **Groups > Booking Details > Rooming List**.

3. On the rooming list view, click the **Lists** tab.



   NOTE: There are three tabs available from the Rooming List screen: PAX, LISTS and SERVICES. The default view is the PAX tab and the list will be empty on first view of the rooming list for a booking.

4. Click **Insert List** to import a list.

5. On the **Insert Rooming List** screen, click *Upload...*.

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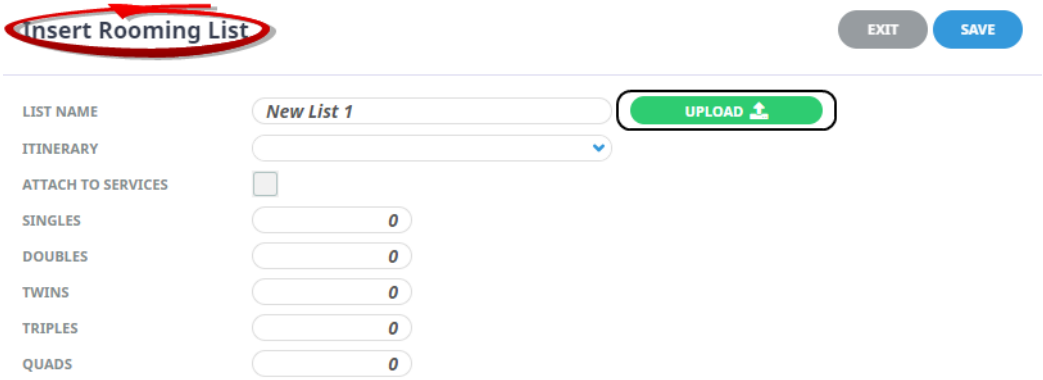
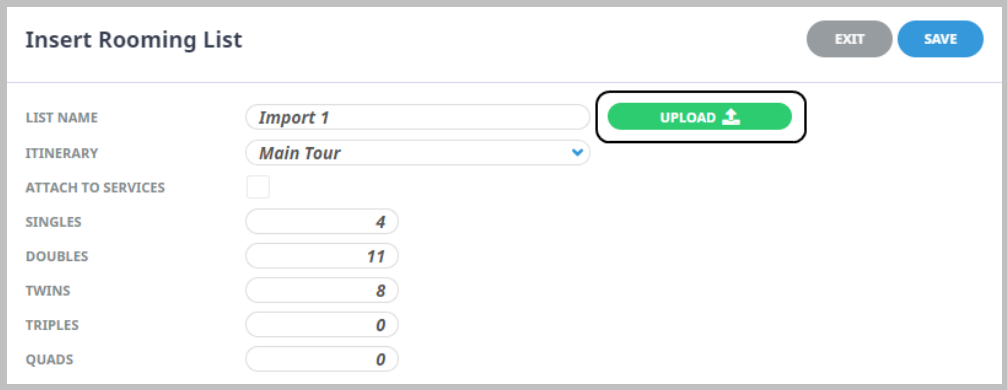


6. Using the Windows Open dialogue box, browse to the location of the csv file, select it and click *Open*.

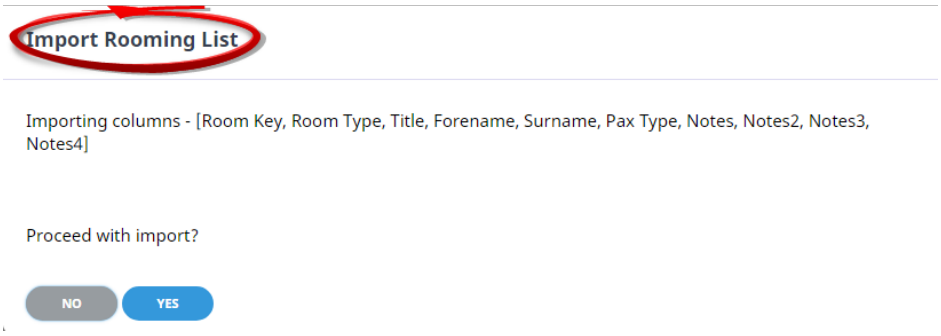
The example shows a list name called *Import 1* ready to be imported.

Selecting the itinerary may populate the room configuration for the number of Singles, Doubles, Twins, Triples, Quads etc



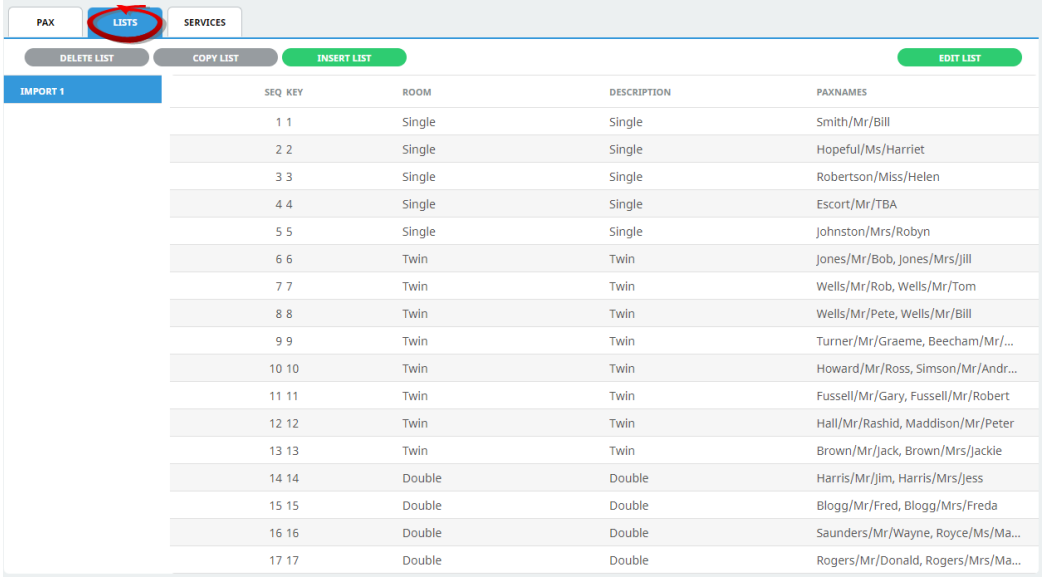
If the csv file is not in the correct format or does not contain the correct data format, the file will not import and an error message appears (see "About the Rooming List Fields" on page 80 for information on the correct format for the csv file).

7. Click *Save* to begin the import. An **Import Rooming List confirmation** appears.



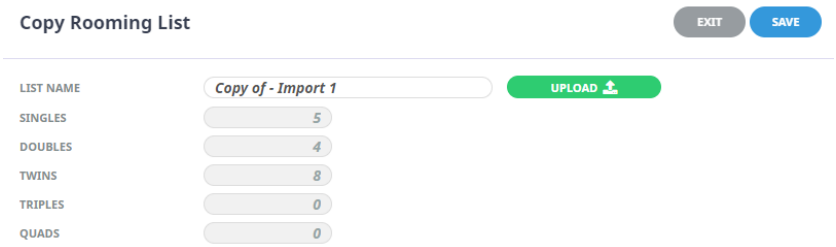
8. Click *Yes* to import the file, or *No* to cancel the import.

9. When the import completes, the names are shown in a named **rooming list** (where the list name is highlighted at left), comprising columns labelled *Seq Key*, *Room*, *Description* and *Pax Names*.

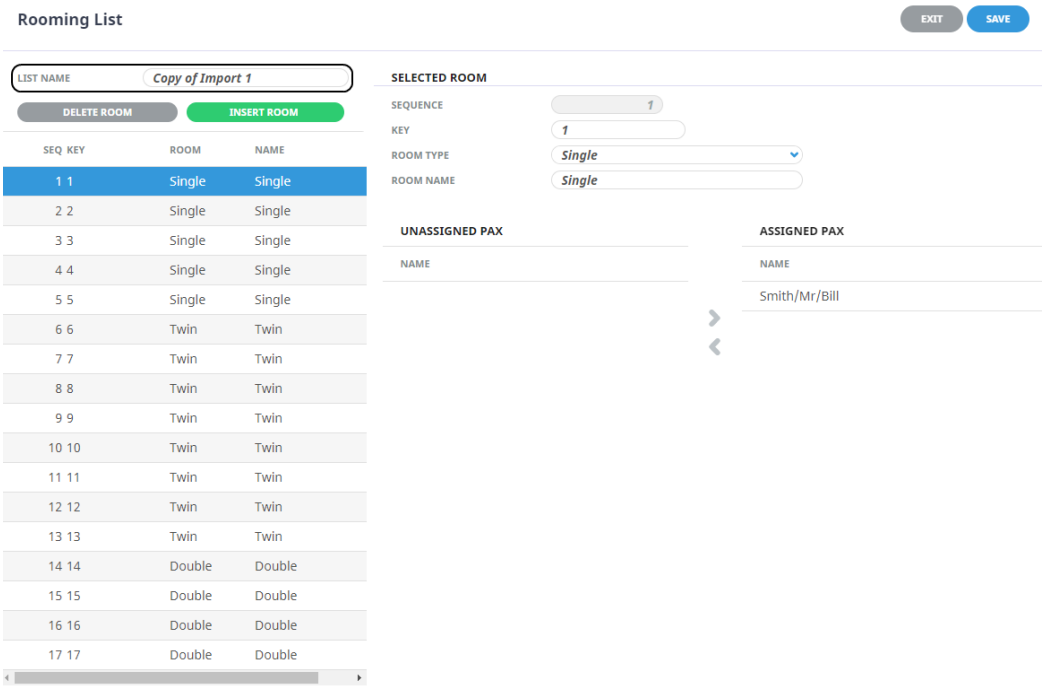


NOTE: When a subsequent new list is being inserted, an existing list can be copied by selecting it and clicking the *Copy List* button (in the screenshot above, the list selected is called *Import 1*).

10. Re-name the List Name.



11. Click the green *Edit List* button to show the **Rooming List** in edit mode.



To edit a list entry, select the list item on the left-hand side of the screen and make the required changes to that entry using the fields on the right-hand side.

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NOTE: If there is more than one entry to be changed, simply highlight the next entry without clicking Save in-between - click *Save* only when all required changes have been made to return to the Rooming List view.

About the Rooming List Fields

Rooming list names can be imported from a CSV file. There is some flexibility with the format of the file but the first row must contain the column names. Valid column names are:

```
'Title' or 'Honorific'
'Forename'
'Surname'
'TitleAlias'
'SurnameAlias'
'ForenameAlias'
'Pax Type'
'Room Key'
'Room Type'
'DOB', 'Birth Date' or 'Date of Birth'
'Age'
'Notes' or 'Notes1'
'Notes2'
'Notes3'
'Notes4'
'Notes5'
'Passport Number'
'Passport Name'
'Passport Nationality' or 'Nationality'
'Passport Issued', 'Issued', 'Issued On' or 'Passport Issued On'
'Passport Place' or 'Passport Issued At'
'Passport Expiry', 'Expiry', 'Expires' or 'Passport Expires On'
```

NOTE: Current mandatory fields are **Title**, **Forename**, **Surname** and **Pax Type**. Some valid examples are:

Example 1

```
Room Key,Room Type,Title,Forename,Surname,Pax Type,Birth date,Passport Number,Notes,Notes2,Notes3,Notes4
1,SG,,,Fiona Eaves,,01/01/1980,,test,test2,test3,
2,SG,,,Janet King,,01/01/1980,,,,,
3,SG,,,Vickie Abel,,01/01/1980,,Vegetarian Meals,,,
4,SG,,,Sheila Lunn,,01/01/1980,,,,,
5,SG,,,Judith Nelson,,01/01/1980,,,,,
6,DB,,,Chris Little,,01/01/1980,,,,,
6,DB,,,Audrey Gregory,,01/01/1980,,,,,
7,TW,,,Susan Perkins,,01/01/1980,,Vegetarian meals,,,
7,TW,,,Marian Cooke,,01/01/1980,,,,,
```

Example 2

```
Room Type,Title,Forename,Surname,Pax Type,Birth date,Passport Number,Notes,Notes2,Notes3,Notes4
SG,,,Fiona Eaves,,01/01/1980,,test,test2,test3,
SG,,,Janet King,,01/01/1980,,,,,
```


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```
SG,,,Vickie Abel,,01/01/1980,,Vegetarian Meals,,,
SG,,,Sheila Lunn,,01/01/1980,,,,,
SG,,,Judith Nelson,,01/01/1980,,,,,
DB,,,Chris Little,,01/01/1980,,,,,
DB,,,Audrey Gregory,,01/01/1980,,,,,
TW,,,Susan Perkins,,01/01/1980,,Vegetarian meals,,,
TW,,,Marian Cooke,,01/01/1980,,,,,
```

Sample CSV File

```
Room Key,Room Type,Title,Forename,Surname,Pax Type,Notes,Notes2,Notes3,Notes4
1,SG,Mr,Bill,Smith,A,,,,
2,SG,Ms,Harriet,Hopeful,A,,,,
3,SG,Miss,Helen,Robertson,A,,,,
4,SG,Mr,TBA,Escort,A,Tour Escort,,,
5,SG,Mrs,Robyn,Johnston,A,,,,
6,TW,Mr,Bob,Jones,A,,,,
6,TW,Mrs,Jill,Jones,A,,,,
7,TW,Mr,Rob,Wells,A,,,,
7,TW,Mr,Tom,Wells,A,,,,
8,TW,Mr,Pete,Wells,A,,,,
8,TW,Mr,Bill,Wells,A,,,,
9,TW,Mr,Graeme,Turner,A,,,,
9,TW,Mr,Harry,Beecham,A,,,,
10,TW,Mr,Ross,Howard,A,,,,
10,TW,Mr,Andrew,Simson,A,,,,
11,TW,Mr,Gary,Fussell,A,,,,
11,TW,Mr,Robert,Fussell,C,,,,
12,TW,Mr,Rashid,Hall,A,,,,
12,TW,Mr,Peter,Maddison,A,,,,
13,DB,Mr,Jack,Brown,A,,,,
13,DB,Mrs,Jackie,Brown,A,,,,
14,DB,Mr,Jim,Harris,A,,,,
14,DB,Mrs,Jess,Harris,A,,,,
15,DB,Mr,Fred,Blogg,A,,,,
15,DB,Mrs,Freda,Blogg,A,,,,
16,DB,Mr,Wayne,Saunders,A,,,,
16,DB,Ms,MaryAnne,Royce,A,,,,
17,DB,Mr,Donald,Rogers,A,,,,
17,DB,Mrs,Maureen,Rogers,A,,,,
```

Room keys can be added or edited after names have been imported.

Do not use text qualifiers such as double quotes (e.g. "text"). If text qualifiers are used and the Room Key field left blank, the leading " qualifier will be interpreted as the Room Key and all imported names will automatically be in the same room.

Attaching List Configurations to Services

This tab enables list configurations to be attached to services in the booking; i.e. assign a list of names to a service or multiple services.

In the example below, the objective is to tie the *Import 1* list to most services that are in the Main Tour itinerary, and the *Pre Accomm* list to the services that are unique to the Pre Tour Accommodation itinerary.

Attach Configurations & Names to Services

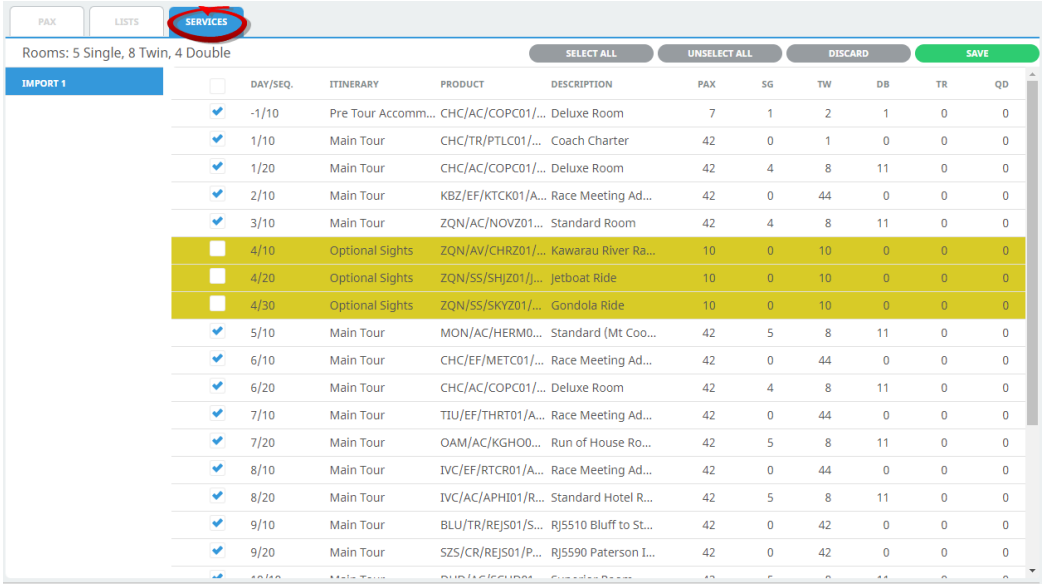
1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. The default view for a booking is the **Dashboard View**.

   To attach a list configuration to booking services, from the Groups menu, select **Groups > Booking Details > Rooming List**.

3. Make sure at least two list configurations are available (see "Import a Rooming List" on page 76).

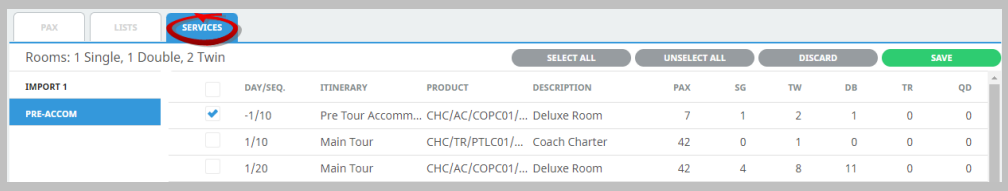
4. On the rooming list view, click the **Services** tab.



   The first list configuration created is selected by default (in this case *Import 1*), showing the services available to be attached.

   NOTE: Services that are ***not*** tagged are available in all lists. Conversely, services that ***are*** tagged (i.e. have already been attached to a list) do not display for subsequent lists.

   For example, the *Pre Accomm* list has only one tagged service, which does not appear in the Import 1 list. The other services available are not tagged and therefore are available in both this list and the Import 1 list.



5. Change the attachment of services for a list by clicking the *Tag* check-box alongside the service or use the *Select All/Unselect All* buttons.

6. Click **Save** to save the list configuration.

   SAVE

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7. Click **Discard** to discard all changes.

   NOTE: Both *Save* and *Discard* are dimmed-out until you make changes.

About the Services Tab Fields

Tag

Tag (click) to select service to include the service(s) in the configuration list.

Select All/Unselect All

Use to select all services listed, or unselect services in bulk.

Day/Seq

The day number and sequence number of the service within the booking.

Itinerary

The Itinerary Name that the service belongs to.

Product

The full product code of the service.

Description

The service description

Pax

The physical count of Adult pax on the service - including Escorts/Drivers/Guides.

SG/TW/DB/TR/QD

The breakdown of Pax Numbers by Room Type.

NOTE: Accommodation services display the number of *Rooms* by type. Non Accommodation per person priced services will show the number of Pax (Second Charge Units - SCU) in the TW column and will be net of any FOC quantities. Non Accommodation group priced services will show the number of SCU ("Tour", "Visit" etc) in the TW column.

Rooming list data can be output on messages and documentation. Details on the formatting and output of these message types are in the System Setup User Manual (Messaging section).

Markup / Commission - Group Bookings

This is the fifth of eight tasks described in this user manual for changing Booking details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the Booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" above (this task)
6. "Booking Notes" on page 89
7. "Agent Notes" on page 93
8. "Recalculate Booking" on page 95

Markup/Commission can be used to change the selling price of a Booking (by adjusting the markup or commission), or to round the prices in a Booking.

The selling price (Retail), Agent Commission (Comm) and Agent Price (Agent) can be set on a service-by-service basis or for the whole Booking.

NOTE:

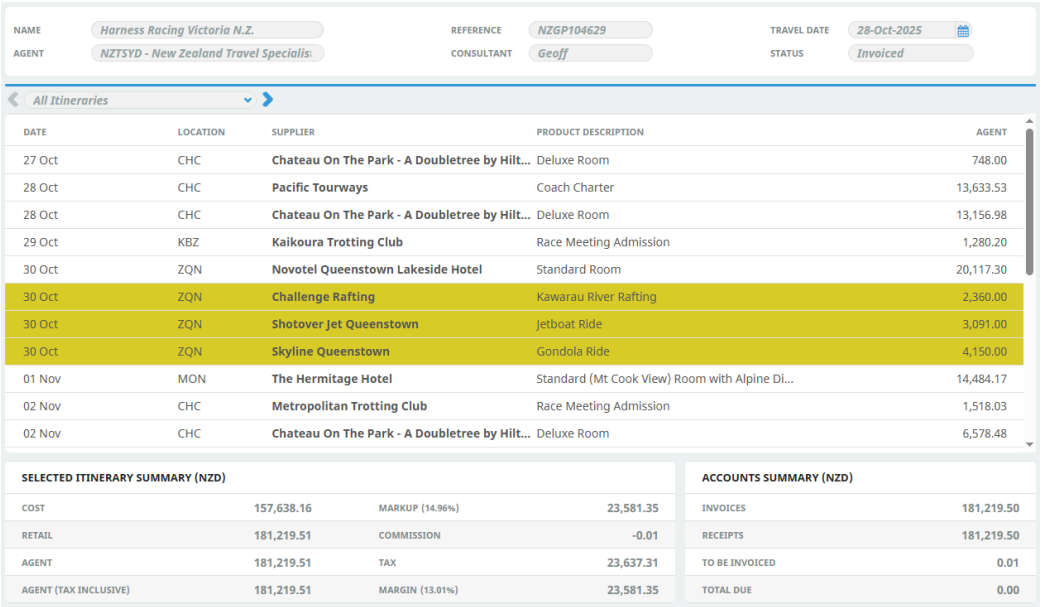
- Any adjustment made here is known as a 'Booking Markup' because it affects the Booking in total. This is treated differently than the 'Product Markup' (applied via price codes or matrix settings) which are at service level. Any adjustment made here will not be visible at service level. It is included in the Service Details Pax Totals screen.
- Booking Markup is in addition to any Price Code, Matrix or Header markup(s).
- Changing Markup/Commission TOTALS will only affect services which have a status that is to be 'included' in the Total. Services that are not included in the total can be modified individually.
- The calculation is always Cost plus Markup equals Retail less Commission equals Agent price.

  If there is no commission in a Booking and the Agent price is adjusted (making it higher than the Retail), then that markup will display as a negative commission.

Adjust Markup and/or Commission

1. If you haven't already done so, search for and retrieve a Booking to work with (see "Retrieve an Existing Group Booking" on page 47).

2. The default view for a Booking is the **Dashboard View**.



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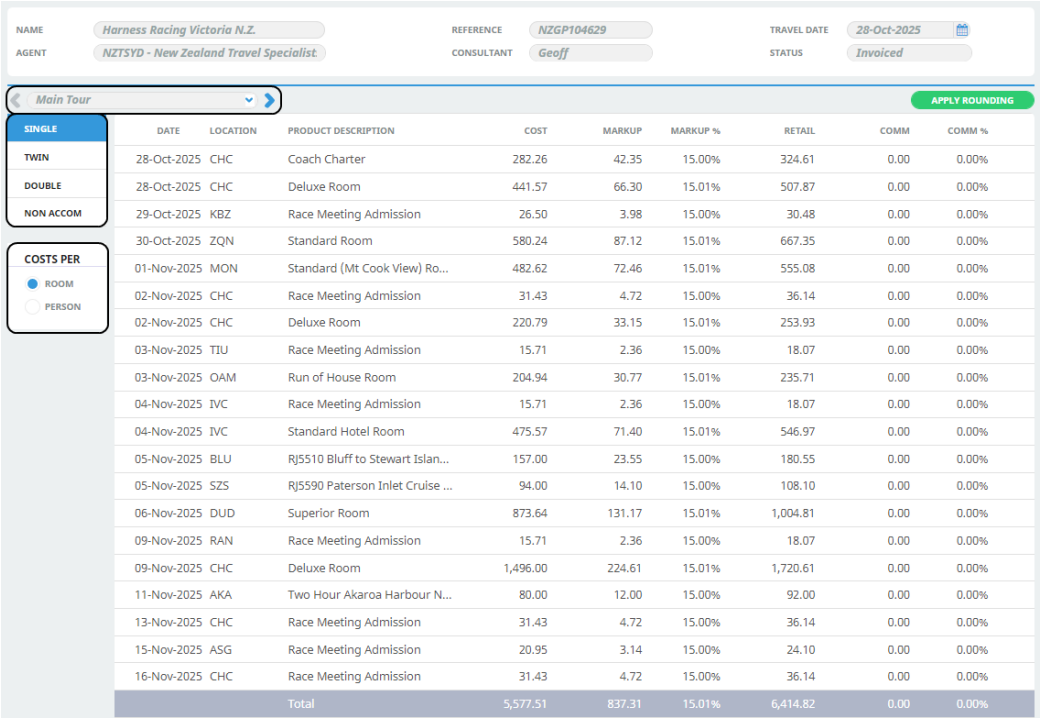
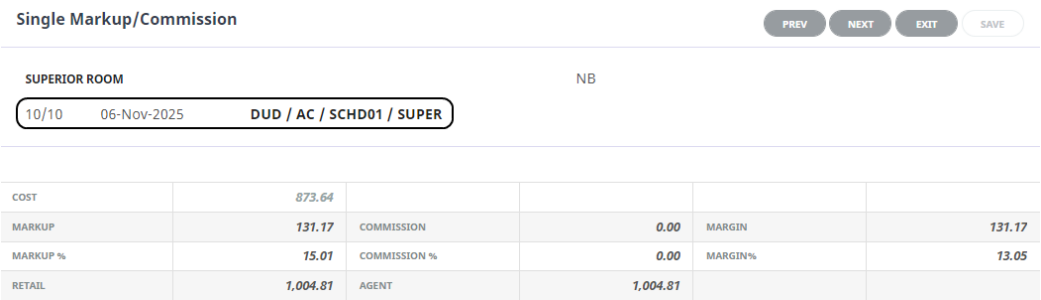
To examine and change markup/commission information, from the Groups menu, select **Groups > Booking Details > Markup/Commission**.

3. Examine the **markup/commission details** on this screen and change any as required by clicking a line to open the Markup/Commission screen.



DATE	LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %
28-Oct-2025	CHC	Coach Charter	282.26	42.35	15.00%	324.61	0.00	0.00%
28-Oct-2025	CHC	Deluxe Room	441.57	66.30	15.01%	507.87	0.00	0.00%
29-Oct-2025	KBZ	Race Meeting Admission	26.50	3.98	15.00%	30.48	0.00	0.00%
30-Oct-2025	ZQN	Standard Room	580.24	87.12	15.01%	667.35	0.00	0.00%
01-Nov-2025	MON	Standard (Mt Cook View) Ro...	482.62	72.46	15.01%	555.08	0.00	0.00%
02-Nov-2025	CHC	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%
02-Nov-2025	CHC	Deluxe Room	220.79	33.15	15.01%	253.93	0.00	0.00%
03-Nov-2025	TIU	Race Meeting Admission	15.71	2.36	15.00%	18.07	0.00	0.00%
03-Nov-2025	OAM	Run of House Room	204.94	30.77	15.01%	235.71	0.00	0.00%
04-Nov-2025	IVC	Race Meeting Admission	15.71	2.36	15.00%	18.07	0.00	0.00%
04-Nov-2025	IVC	Standard Hotel Room	475.57	71.40	15.01%	546.97	0.00	0.00%
05-Nov-2025	BLU	RJ5510 Bluff to Stewart Islan...	157.00	23.55	15.00%	180.55	0.00	0.00%
05-Nov-2025	SZS	RJ5590 Paterson Inlet Cruise ...	94.00	14.10	15.00%	108.10	0.00	0.00%
06-Nov-2025	DUD	Superior Room	873.64	131.17	15.01%	1,004.81	0.00	0.00%
09-Nov-2025	RAN	Race Meeting Admission	15.71	2.36	15.00%	18.07	0.00	0.00%
09-Nov-2025	CHC	Deluxe Room	1,496.00	224.61	15.01%	1,720.61	0.00	0.00%
11-Nov-2025	AKA	Two Hour Akaroa Harbour N...	80.00	12.00	15.00%	92.00	0.00	0.00%
13-Nov-2025	CHC	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%
15-Nov-2025	ASG	Race Meeting Admission	20.95	3.14	15.00%	24.10	0.00	0.00%
16-Nov-2025	CHC	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%
		Total	5,577.51	837.31	15.01%	6,414.82	0.00	0.00%

4. Identify the service line to have markup/commission applied and click it. In the screenshot above, the service line chosen is **Superior Room** (seventh line up from the bottom).



5. Apply the markup and/or commission required, either as values or percentages. In other words, you can enter both a markup and a commission on this screen, but enter each as *either* a dollar value or a percentage.

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

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

8. Once you have finished (and *after* clicking Save), click **Exit** to close the Markup/Commission screen.

This example shows totals for itinerary Main Tour (Twin rooms) *after* markup and commission has been applied:

Main Tour

SINGLE
TWIN
DOUBLE
NON ACCOM

COSTS PER
ROOM
PERSON

APPLY ROUND

DATE	LOCATION	PRODUCT DESCRIPTION	COST (1)	MARKUP (2)	MARKUP % (3)	RETAIL (4)	COMM (5)	COMM % (6)	AGENT (7)
28-Oct-2025	CHC	Coach Charter	564.52	84.69	15.00%	649.22	0.00	0.00%	649.22
28-Oct-2025	CHC	Deluxe Room	509.14	76.41	15.01%	585.55	0.00	0.00%	585.55
29-Oct-2025	KBZ	Race Meeting Admission	53.01	7.95	15.00%	60.96	0.00	0.00%	60.96
30-Oct-2025	ZQN	Standard Room	798.48	119.83	15.01%	918.31	0.00	0.00%	918.31
01-Nov-2025	MON	Standard (Mt Cook View) Ro...	561.24	84.23	15.01%	645.47	0.00	0.00%	645.47
02-Nov-2025	CHC	Race Meeting Admission	62.86	9.43	15.00%	72.29	0.00	0.00%	72.29
02-Nov-2025	CHC	Deluxe Room	254.57	38.20	15.01%	292.78	0.00	0.00%	292.78
03-Nov-2025	TIU	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%	36.14
03-Nov-2025	OAM	Run of House Room	245.87	36.90	15.01%	282.77	0.00	0.00%	282.77
04-Nov-2025	IVC	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%	36.14
04-Nov-2025	IVC	Standard Hotel Room	555.14	83.31	15.01%	638.46	0.00	0.00%	638.46
05-Nov-2025	BLU	RJ5510 Bluff to Stewart Islan...	314.00	47.11	15.00%	361.11	0.00	0.00%	361.11
05-Nov-2025	SZS	RJ5590 Paterson Inlet Cruise ...	188.00	28.20	15.00%	216.20	0.00	0.00%	216.20
06-Nov-2025	DUD	Superior Room	1,021.29	153.27	15.01%	1,174.56	0.00	0.00%	1,174.56
09-Nov-2025	RAN	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%	36.14
09-Nov-2025	CHC	Deluxe Room	1,496.00	224.51	15.01%	1,720.51	0.00	0.00%	1,720.51
11-Nov-2025	AKA	Two Hour Akaroa Harbour N...	160.00	24.00	15.00%	184.00	0.00	0.00%	184.00
13-Nov-2025	CHC	Race Meeting Admission	62.86	9.43	15.00%	72.29	0.00	0.00%	72.29
15-Nov-2025	ASG	Race Meeting Admission	41.90	6.29	15.00%	48.19	0.00	0.00%	48.19
16-Nov-2025	CHC	Race Meeting Admission	62.86	9.43	15.00%	72.29	0.00	0.00%	72.29
		Total	7,046.03	1,057.35	15.01%	8,103.38	0.00	0.00%	8,103.38

About the Markup/Commission Fields

The markups and/or commissions already applied to the Booking from any source are shown; be they applied from the Product Database, the Markup/Commission matrix or the Markup/Commission screen.

Clicking on any line (including the total) allows editing of the Markup, Markup%, Retail, Commission and Commission% values.

NOTE: If there are multiple itineraries in the booking, each itinerary needs to be selected and marked-up independently.

All changes made to markups/commissions will be lost when pax configuration changes happen or a recalculation is done.

Room types (Single / Twin / Double / Non Accom)

Markups and Commissions must be applied to each room type in the booking. The Non Accommodation services in a group booking are the same price for all pax, regardless of room type. The prices of Non Accommodation services must be marked up separately and it is generally easier if the Non Accomm services/totals are adjusted before the Rooms.

Costs Per

These radio buttons allow switching between Room Costs or Per Person Costs. The default is Room Costs.

Markup Columns

The values in the M/up $, M/up % and Retail columns can be adjusted service by service if required.

Commission Columns

The values in the Comm $, Comm % and Agent columns can be adjusted service by service if required.

Totals row

The Room Totals (M/up $, M/up %, Retail, Comm $, Comm %, Agent) can be adjusted and the adjustment amount will be pro-rated across all services.

Rounding

Use the **Apply Rounding** button to round markup and commission values.

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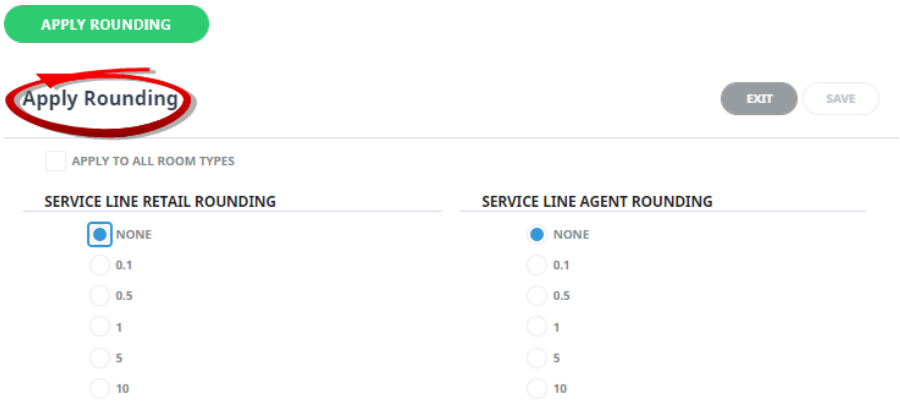


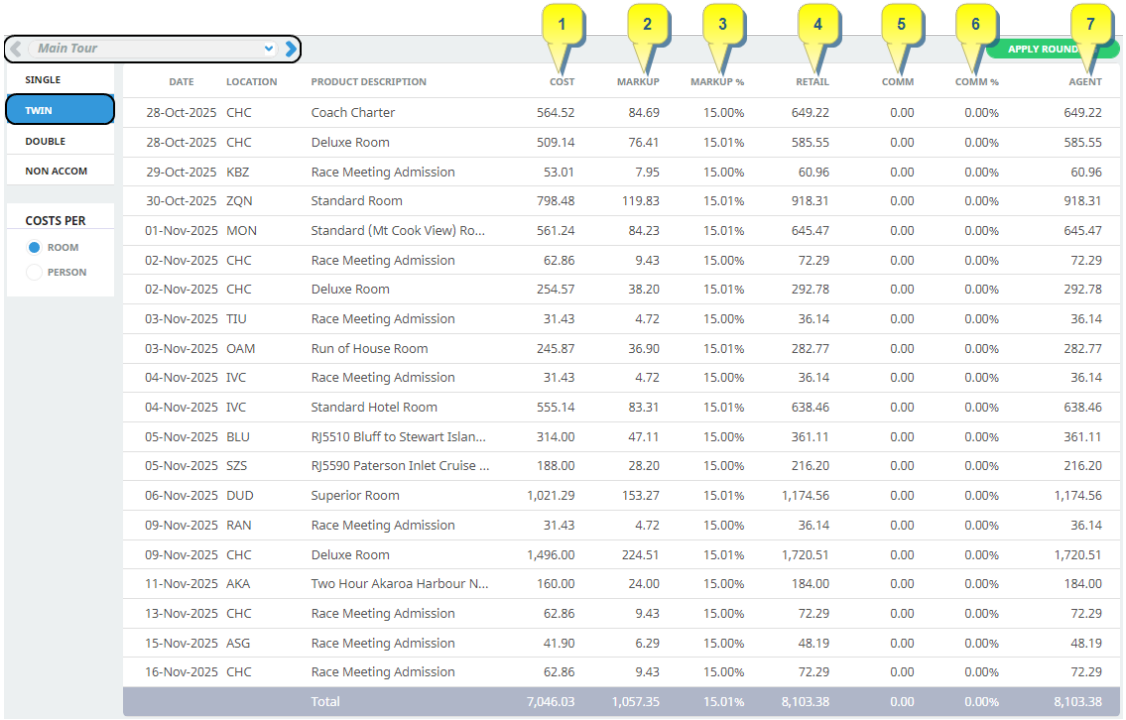
Service Line Retail Rounding

These radio buttons can be used to control rounding of the Retail values - the M/up $ (and M/up %) columns. Rounding can be None, or to the nearest .10, .50, 1.00, 5.00 or 10.00. The default is None.

Service Line Agent Rounding

These radio buttons can be used to control rounding of the Agent values - the Comm $ (and Comm %) columns. Rounding can be None, or to the nearest .10, .50, 1.00, 5.00 or 10.00. The default is None.

Column Headings and Descriptions



DATE	LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %	AGENT
28-Oct-2025	CHC	Coach Charter	564.52	84.69	15.00%	649.22	0.00	0.00%	649.22
28-Oct-2025	CHC	Deluxe Room	509.14	76.41	15.01%	585.55	0.00	0.00%	585.55
29-Oct-2025	KBZ	Race Meeting Admission	53.01	7.95	15.00%	60.96	0.00	0.00%	60.96
30-Oct-2025	ZQN	Standard Room	798.48	119.83	15.01%	918.31	0.00	0.00%	918.31
01-Nov-2025	MON	Standard (Mt Cook View) Ro...	561.24	84.23	15.01%	645.47	0.00	0.00%	645.47
02-Nov-2025	CHC	Race Meeting Admission	62.86	9.43	15.00%	72.29	0.00	0.00%	72.29
02-Nov-2025	CHC	Deluxe Room	254.57	38.20	15.01%	292.78	0.00	0.00%	292.78
03-Nov-2025	TIU	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%	36.14
03-Nov-2025	OAM	Run of House Room	245.87	36.90	15.01%	282.77	0.00	0.00%	282.77
04-Nov-2025	IVC	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%	36.14
04-Nov-2025	IVC	Standard Hotel Room	555.14	83.31	15.01%	638.46	0.00	0.00%	638.46
05-Nov-2025	BLU	RJ5510 Bluff to Stewart Islan...	314.00	47.11	15.00%	361.11	0.00	0.00%	361.11
05-Nov-2025	SZS	RJ5590 Paterson Inlet Cruise ...	188.00	28.20	15.00%	216.20	0.00	0.00%	216.20
06-Nov-2025	DUD	Superior Room	1,021.29	153.27	15.01%	1,174.56	0.00	0.00%	1,174.56
09-Nov-2025	RAN	Race Meeting Admission	31.43	4.72	15.00%	36.14	0.00	0.00%	36.14
09-Nov-2025	CHC	Deluxe Room	1,496.00	224.51	15.01%	1,720.51	0.00	0.00%	1,720.51
11-Nov-2025	AKA	Two Hour Akaroa Harbour N...	160.00	24.00	15.00%	184.00	0.00	0.00%	184.00
13-Nov-2025	CHC	Race Meeting Admission	62.86	9.43	15.00%	72.29	0.00	0.00%	72.29
15-Nov-2025	ASG	Race Meeting Admission	41.90	6.29	15.00%	48.19	0.00	0.00%	48.19
16-Nov-2025	CHC	Race Meeting Admission	62.86	9.43	15.00%	72.29	0.00	0.00%	72.29
		Total	7,046.03	1,057.35	15.01%	8,103.38	0.00	0.00%	8,103.38

Column Number	Explanation
1	**Cost** The sum of the 'Cost' values for each of the services in the booking, cost values come from the product database.
2	**Markup** The amount of any booking markup (markups applied in the Markups / Commission Screen)

Column Number	Explanation
3	**Markup %** An on-screen percentage calculation (i.e. not stored in the system) of the difference between Cost and Retail amounts.
4	**Retail** The sum of the cost price plus all types of markup (product markup and booking markup).
5	**Comm** The value of any agent commission (commission being paid to the debtor/agent attached to the booking), which is deducted from the retail price.
6	**Comm %** An on-screen calculation (i.e. not stored in the system) of the commission value expressed as a percentage of the retail total.
7	**Agent** The sum of retail less commission = the price the agent debtor will pay.

Refer to Appendix 1 - Scroll Column Headings for more information on the list columns.

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Booking Notes

This is the sixth of eight tasks described in this user manual for changing booking or quote details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the Booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" above (this task)
7. "Agent Notes" on page 93
8. "Recalculate Booking" on page 95

There are Booking Notes and Agent Notes:

- **Booking Notes** allows free-format notes to be added to the Booking under a range of predefined Note Categories, which must first have been set up via **Home > System > Code Setup > Messaging > Notes**. Notes can be output on documents and messages to both agents and suppliers if the note category is set to 'Include in Messaging'.
- Booking Notes will sort data by note category.
- **Agent Notes** allows viewing (read-only) of notes attached to the agent.

NOTE: Notes added in this screen apply at the *Booking Header* level; i.e. to the whole booking rather than to a specific booking service line.

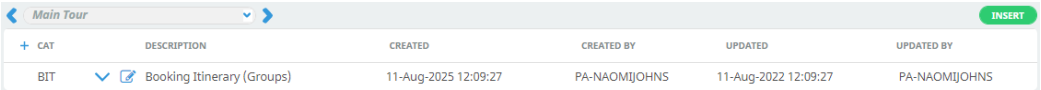
Insert/Modify a Booking Note

1. If you haven't already done so, search for and retrieve a Booking to work with (see "Retrieve an Existing Group Booking" on page 47).

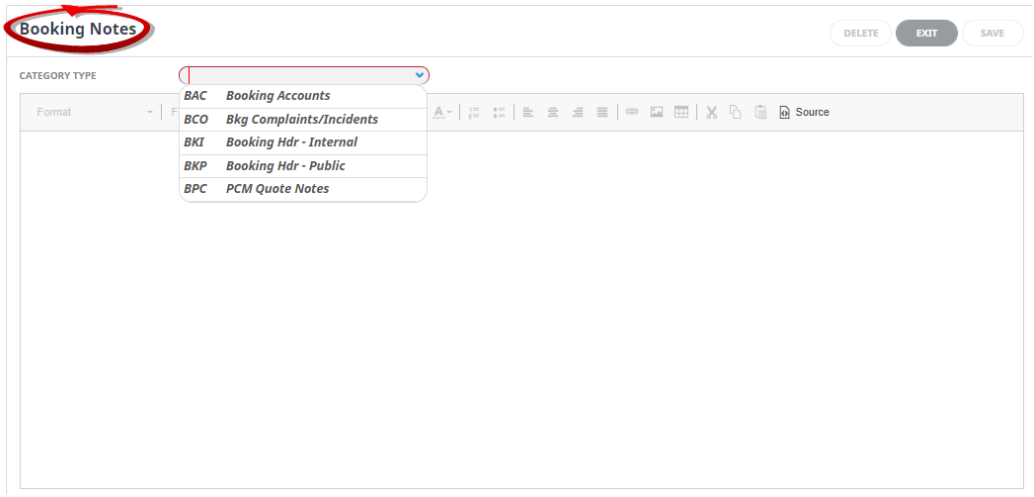
2. The default view for a Booking is the **Dashboard View**.

3. To examine and work with Booking Notes, from the Groups menu, select **Groups > Booking Details > Booking Notes**.

4. From the list of **Booking Notes** returned, click any existing note to open it. To add a note, click *Insert*.

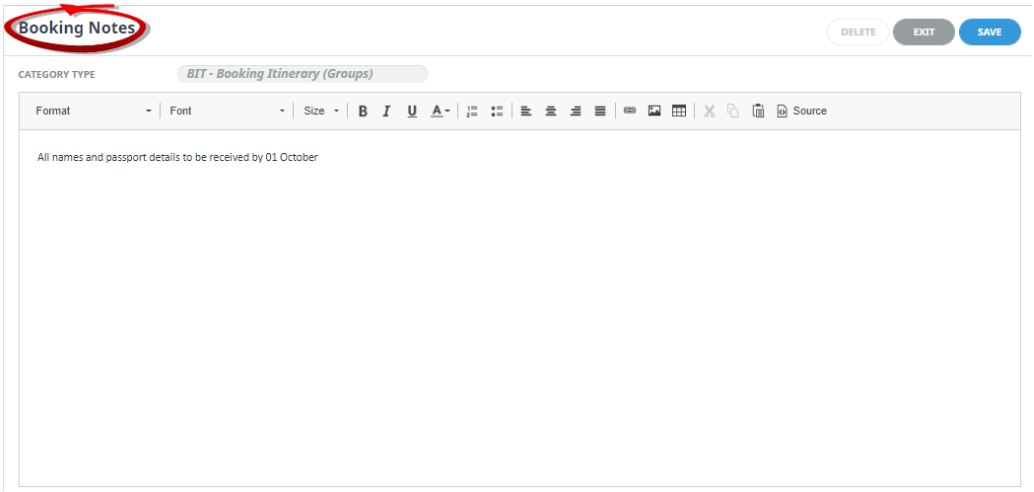


5. On the **Booking Notes** screen, choose a category type from the *Category Type* drop-down list.



NOTE: The Category Types available depend on the itinerary chosen.

6. Enter text in the body of the **Booking Note** and format as required.

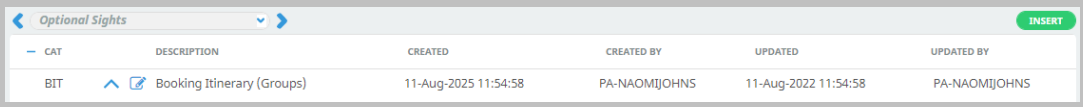


7. Click **Save** to keep the changes.

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

NOTE: If a booking note does not appear in the list for a particular itinerary, then the note does not apply to that itinerary.

For example, this booking note applies only to the *Optional Sights* itinerary. Select any other itinerary attached to this booking and the note will not appear (apart from the default itinerary, which lists all booking notes for all itineraries).



NOTE: If you are using multi language note categories, a further field selection to assign a language occurs. This allows language alternative text to be inserted within a booking note and if message templates are configured to use multi language notes then the note information will be generated using the appropriate alternative language.

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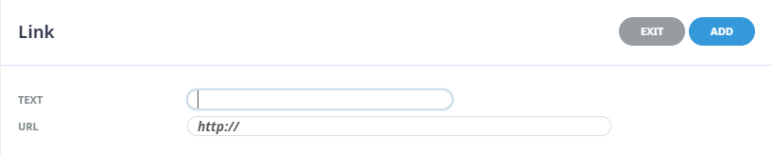
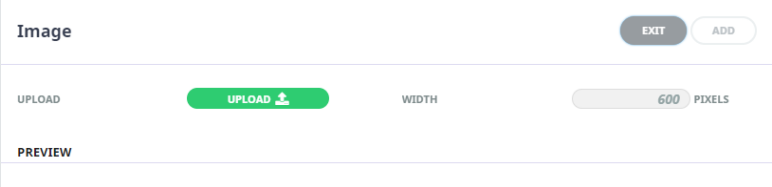
About Booking Notes Formatting Fields

The rich text editor section (or body) of the note is a blank page for the booking note text to be inserted or edited.

The Editing screen has the following items:

Format type	Format Option Descriptions
Format	Format of the paragraph text. Normal, Headings 1,2,3,4,5, & 6, Formatted, Address,
Font	Font of text (will default from the INI Setting DEFAULTFONT)
Size	Font Size of text (will default from the INI Setting DEFAULTEDITFONTSIZE)
	Style, Font and Font Size. The available styles and fonts are the Windows styles and fonts installed on the computer running Tourplan
B	Bold - highlight the text to be bold faced and click this button
I	Italics - highlight the text to be italic and click this button
U	Underline - highlight the text to underlined and click this button
A	Colour of text – highlight the text to change the colour and click this button
	Numbered bullet points - click this button to create a numbered list
	Bullet points - click this button to create a bulleted list
	Left aligned text - click this button to justify text on the left margin
	Centre aligned text - click this button to centre text between the left and right margins
	Right aligned text - click this button to justify text on the right margin
	Left and Right justified text. Click this button to justify text between the left & right margins
	Insert a URL link – click this button to insert the text you want showing as a hyperlink and insert the required URL 
	Upload an image – click this button to upload an image 

Format type	Format Option Descriptions
	Insert a table – click this button to insert a table
	Cut text (Ctrl+X) highlight text to be cut and click this button
	Copy text (Ctrl+C) highlight text to be copied and click this button
	Paste text (Ctrl+V) place the cursor at the point where copied/cut text is to be placed and click this button
Source	Selecting this button will show the text editor in CSS styling source code

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Agent Notes

This is the seventh of eight tasks described in this user manual for changing booking or quote details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the Booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" on page 89
7. "Agent Notes" above (this task)
8. "Recalculate Booking" on page 95

There are Booking Notes and Agent Notes:

- **Booking Notes** allows free-format notes to be added to the Booking under a range of predefined Note Categories, which must first have been set up via **Home > System > Code Setup > Messaging > Notes**. Notes can be output on documents and messages to both agents and suppliers if the note category is set to 'Include in Messaging'.
- Booking Notes will sort data by note category.
- **Agent Notes** allows viewing (read-only) of notes attached to the agent.

View Agent Notes (Read-Only)

1. If you haven't already done so, search for and retrieve a Booking to work with (see "Retrieve an Existing Group Booking" on page 47).

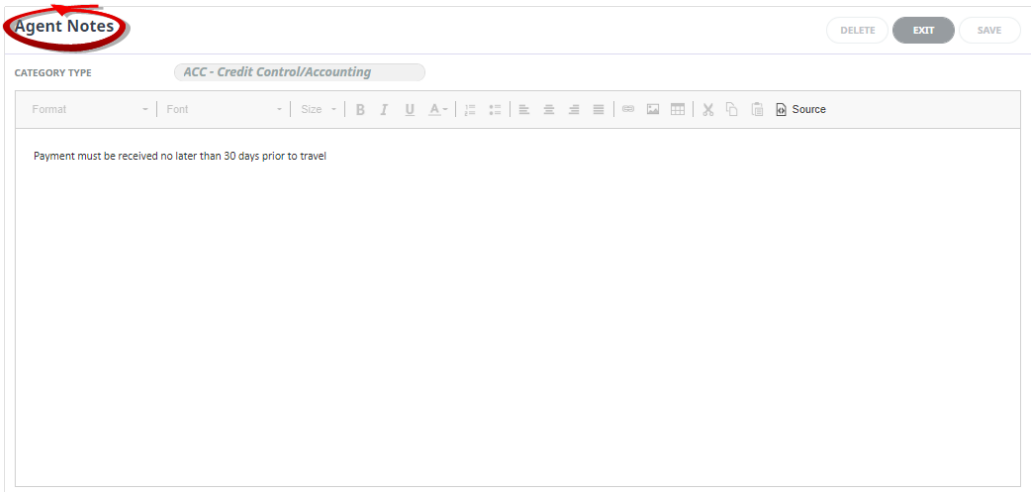
2. The default view for a Booking is the **Dashboard View**.

3. To examine and work with agent notes, from the Groups menu, select **Groups > Booking Details > Agent Notes**.

4. From the list of **agent notes** returned, click any note to open it.

+ CAT	DESCRIPTION	CREATED	CREATED BY	UPDATED	UPDATED BY
AGN	Agent General Information	22-May-2024 15:24:48	PA-GEOFFBEAVER	22-May-2024 15:24:48	PA-GEOFFBEAVER

The note can be viewed using the down arrow or opened using the magnifying class. Once open, the content of an agent note can be read, but it cannot be changed:



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

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Recalculate Booking

This is the last of eight tasks described in this user manual for changing booking or quote details.

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the Booking, they might not all be needed.

The full list is:

1. "General Setup - Group Bookings" on page 61
2. "Pax Configurations - Group Bookings" on page 65
3. "Pax Totals Group Bookings" on page 69
4. "Rooming List - Group Bookings" on page 73
5. "Markup / Commission - Group Bookings" on page 84
6. "Booking Notes" on page 89
7. "Agent Notes" on page 93
8. "Recalculate Booking" above (this task)

Some Booking changes force a recalculation, but a Booking can be recalculated at any time by choosing the Recalculate menu option.

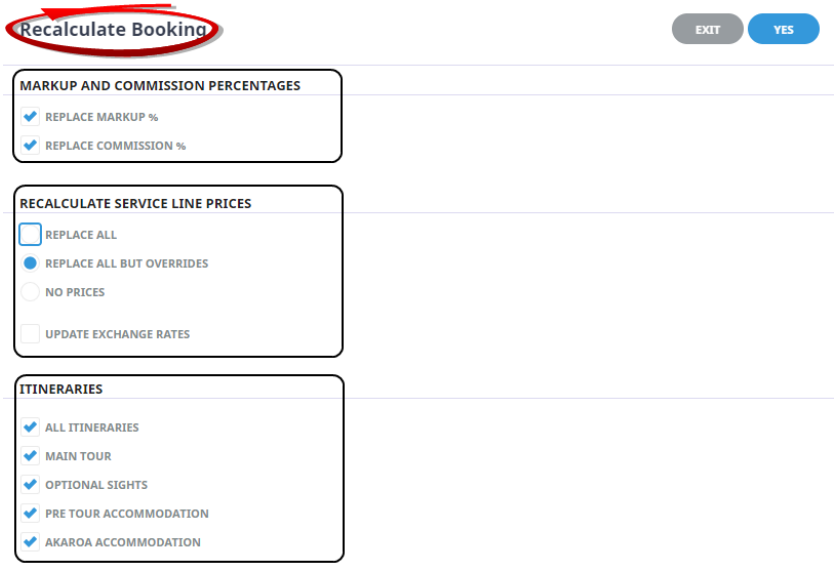
Recalculate the Booking

1. If you haven't already done so, search for and retrieve a Booking to work with (see "Retrieve an Existing Group Booking" on page 47).

2. The default view for a Booking is the **Dashboard View**.

   From the Groups menu, select **Groups > Booking Details > Recalculate**.

3. On the **Recalculate Booking** screen, review each of the settings and update if necessary.



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

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

About the Recalculate Booking Fields

Recalculate Markup and Commission Percentages

- **Replace Markup %** - When checked, any manual markup that may have been applied to services will be replaced by the markup percentages set in the Itinerary Header.
- **Replace Commission %** - When checked, any manual commission that may have been applied to services will be replaced by the commission percentages set in the Itinerary Header.

Recalculate Service Line Prices

- **Replace All** – Revisits the product database and re-costs all services based on rates from the product database.
- **Replace All But Overrides** – As above, however does not re-cost services where the product database rates have been manually overridden. Manually overridden values will display in a separate dialogue and need to be confirmed with the 'OK' button.
- **No Prices** – Recalculates the totals based on the existing service line values.
- **Update Exchange Rates** – This check-box can be used to update the Booking values with any changes in exchange rates between service and Booking currencies.

Recalculate Itineraries

This list allows a specific itinerary to be recalculated or all itineraries to be recalculated.

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Copy Booking

A Booking may be copied to a new name/travel date. First find and recall the Booking to be copied, then replace the existing Booking fields with new values. As the Booking details are copied, the new Booking will be re-costed based on the new Travel Date and Agent chosen.

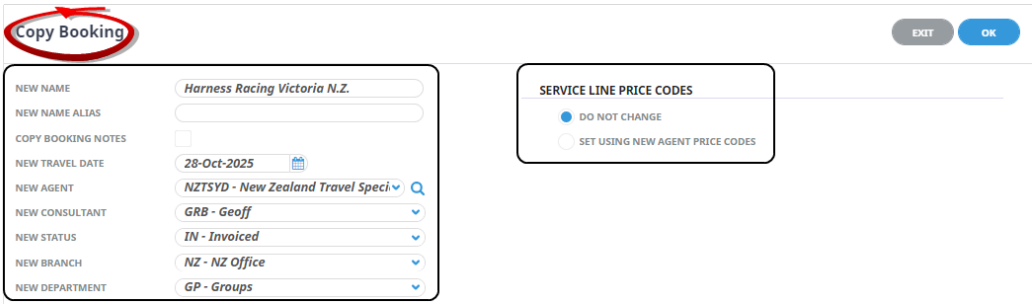
Copy a Booking

1. If you haven't already done so, search for and retrieve a Booking to work with (see "Retrieve an Existing Group Booking" on page 47).

2. The default view for a Booking is the **Dashboard View**.

   From the Groups menu, select **Groups > Booking Details > General Setup** click **Copy Booking**.

3. On the **Copy Booking** screen, give this new booking a name by over-typing the existing name in the *New Name* field. Also update any other details in their respective *New ...* fields.



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

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

About the Copy Booking Fields

New Name

Enter the name for the new (i.e. copied) Booking.

New Name Alias

If the Name Alias field is used for an alternative Booking name, enter the alias name for the new (i.e. copied) Booking.

Copy Booking Notes

All booking notes will be copied to the new booking if the checkbox is selected.

New Travel Date

Enter a new travel date if applicable.

New Agent

An alternative agent can be selected if required.

New Consultant

Select the Consultant Code as required.

New Status

Select the new PCM status as required.

New Branch

An alternative branch can be selected if required.

New Department

An alternative department can be selected if required.

Service Line Price Codes

NOTE: This field should only be changed if the Price Code that is attached to the Agent needs to be overridden.

- **Do Not Change** - Checking this radio button keeps the price codes in the service line in the new Booking, the same as they were in the host Booking. This means that any service line price codes which may have been overridden in the host Booking will be retained in the copy.
- **Set Using New Agent Price Codes** – This setting uses the price code hierarchy attached to the agent in the copied Booking.

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CHAPTER 5

Working with Itinerary

Once created, group Bookings need to be viewed, edited, added-to, reported-on and otherwise maintained. Tourplan NX arranges these maintenance operations into three categories; Booking Details, Itinerary, and Operations and Accounts (there is another category at the top of the menu structure, called the *Dashboard*, but this is solely for viewing purposes - all fields in the Dashboard view are read-only). Each category has a number of sub-categories that group related screens and fields together, enabling relevant management tasks to be carried out on the Booking.

This chapter describes the functions and procedures related to the Itinerary menu.

In this chapter ...

Itinerary View 100
Pickup / Dropoff 101
Voucher Text 106
Service Notes 111
Product Notes 115
PCM Management Groups 119
Change Travel Date 124
Manage Days 127
Insert Booking 130

TOURPLAN

Itinerary View

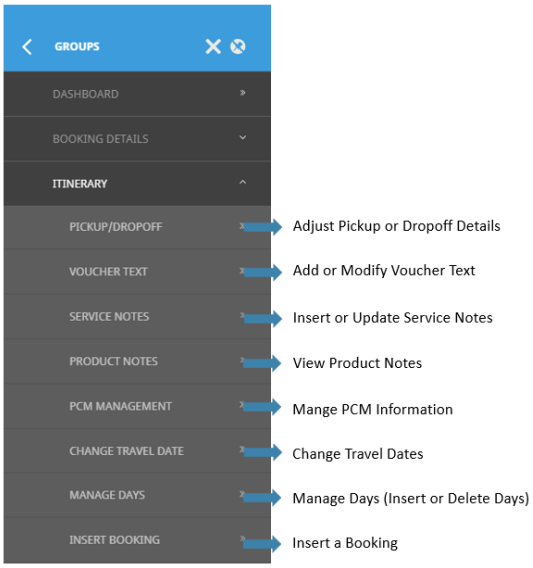
The Itinerary view is where services that make up a Booking are added or updated. As with changing general Booking details, there are several places to change itinerary information.

When a single service is displayed, the finer details of the service as it relates to the Booking are available for editing – such things as Voucher Text and Pickup/Dropoff details. It is this functionality that is in NX under the Groups > Itinerary view.

NOTE: It's common for a booking consultant to get all services confirmed before entering these details.

The Itinerary view has a collapsed view, whereby the detail can be viewed over the Booking as a whole – therefore ensuring that pickup/drop-off timings etc. are consistent and correct. Generally, all services listed are available for editing in NX, including Service Notes and Product Notes.

The following graphic shows the Groups **Itinerary** menu matched with corresponding procedures in the Groups User Manual.



What next?

The first topic in this chapter describes how to "Add an Itinerary" on page 54. Although most bookings require only one itinerary, you can add multiple itineraries to any booking.

Use Pax Configurations to add itineraries

Adding an itinerary is done via the *Booking Details* menu ("Pax Configurations - Group Bookings" on page 65), not via the *Itinerary* menu.

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Pickup / Dropoff

This is the first of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" above (this task)
2. "Voucher Text" on page 106
3. "Service Notes" on page 111
4. "Product Notes" on page 115
5. "PCM Management Groups" on page 119
6. "Change Travel Date" on page 124
7. "Manage Days" on page 127
8. "Insert Booking" on page 130

The Pickup / Dropoff screen allows viewing and editing of the pickup and dropoff times and places, as well as a remarks field for each service in a booking.

NOTE:

- The generic term 'Pickup/Dropoff' is used throughout Tourplan. It could easily be 'Arrive/Depart', 'Begin/End' or any other term describing a start and finish time and location.
- Pickup/Dropoff details apply to the service, not individual pax.
- Services (such as Rental Cars) which have had replicated locations set up against the Supplier (see Product User Manual, **Product Setup > Supplier > Replicated Locations**) are able to have specific pickup and dropoff points attached to each location available. When these specific addresses/airport locations etc. have been set up, these are the only pickup/dropoff addresses that will show in the drop-down for the service.
- It is easier if all services are entered into a booking before adding or editing the Pickup/Dropoff details, since, as services are included in the booking, the supplier name is added to a list of 'available' pickup or drop-off points. Most pickup and drop-off points can be selected from a drop-down without having to type the names. Any details that are manually entered are also stored and are available from the drop-down list. Data selected from the drop-down list can be edited.
- Pickup/Dropoff/Remark details can be viewed for specific itineraries or for all itineraries (the default Itinerary view is ***All Itineraries*** - to select a specific itinerary, select it from the drop-down list at the top left of the service list, either in Itinerary View or the Pickup/Dropoff screen).
- Variations to how times are displayed on screen will depend on the settings user company's have adopted in their system set up.

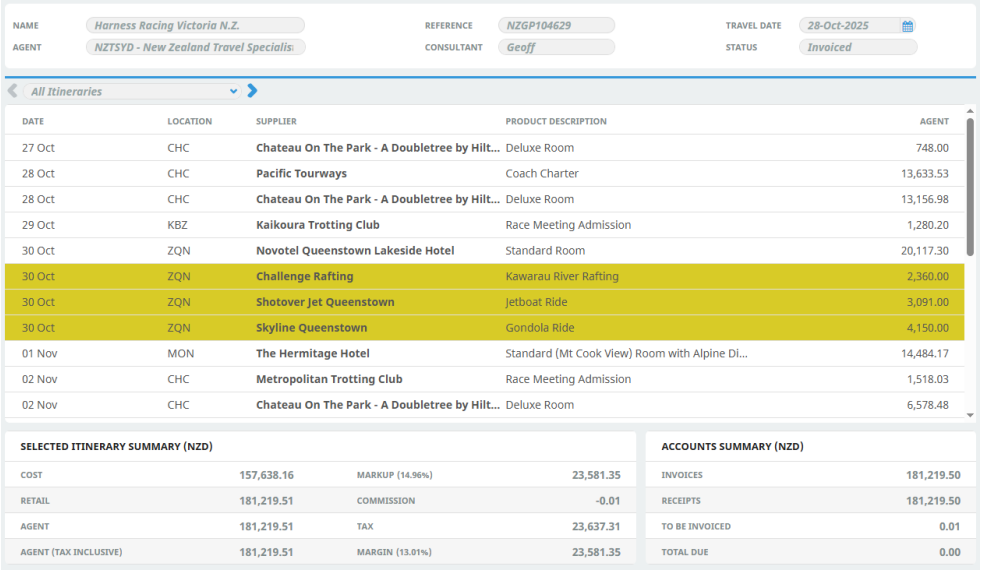
Adjust Pickup or Dropoff Details

Make sure you have a booking displayed in Itinerary View.

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. Switch to the **Itinerary View** of the booking via menu *Groups* > *Itinerary*.

a. The default view for a Booking is the **Dashboard view**.



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialis	CONSULTANT	Geoff	STATUS	Invoiced

All Itineraries

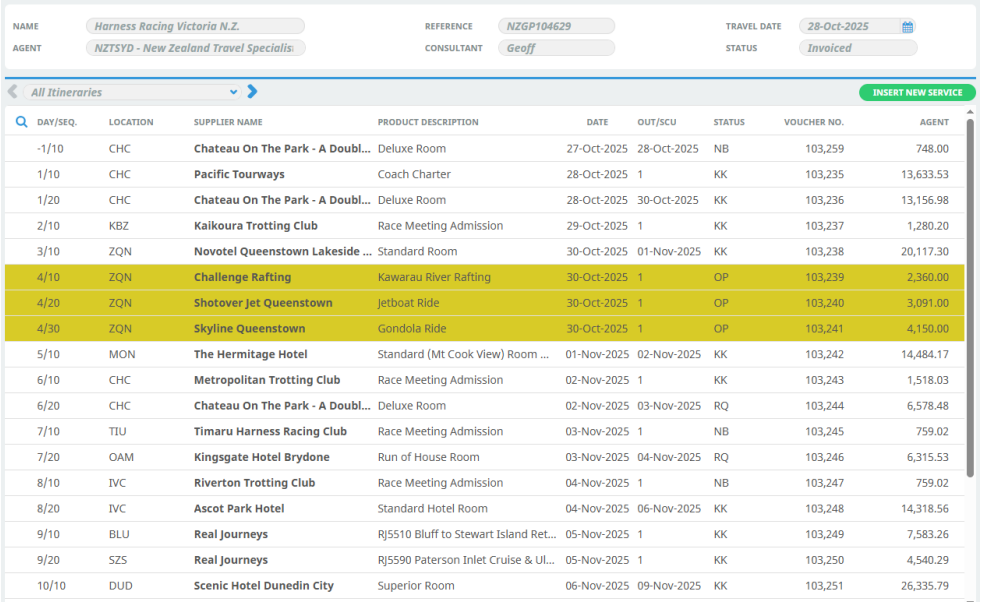
DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
27 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	748.00
28 Oct	CHC	Pacific Tourways	Coach Charter	13,633.53
28 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	13,156.98
29 Oct	KBZ	Kaikoura Trotting Club	Race Meeting Admission	1,280.20
30 Oct	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	20,117.30
30 Oct	ZQN	Challenge Rafting	Kawarau River Rafting	2,360.00
30 Oct	ZQN	Shotover Jet Queenstown	Jetboat Ride	3,091.00
30 Oct	ZQN	Skyline Queenstown	Gondola Ride	4,150.00
01 Nov	MON	The Hermitage Hotel	Standard (Mt Cook View) Room with Alpine Di...	14,484.17
02 Nov	CHC	Metropolitan Trotting Club	Race Meeting Admission	1,518.03
02 Nov	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	6,578.48

SELECTED ITINERARY SUMMARY (NZD)			
COST	157,638.16	MARKUP (14.96%)	23,581.35
RETAIL	181,219.51	COMMISSION	-0.01
AGENT	181,219.51	TAX	23,637.31
AGENT (TAX INCLUSIVE)	181,219.51	MARGIN (13.01%)	23,581.35

ACCOUNTS SUMMARY (NZD)	
INVOICES	181,219.50
RECEIPTS	181,219.50
TO BE INVOICED	0.01
TOTAL DUE	0.00

b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

c. Examine the **Itinerary** on this screen.



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialis	CONSULTANT	Geoff	STATUS	Invoiced

All Itineraries — INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

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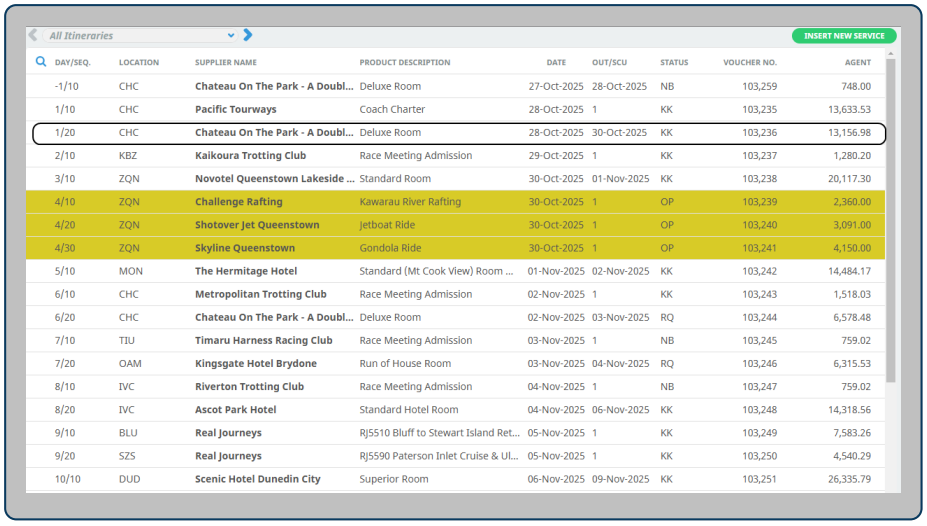
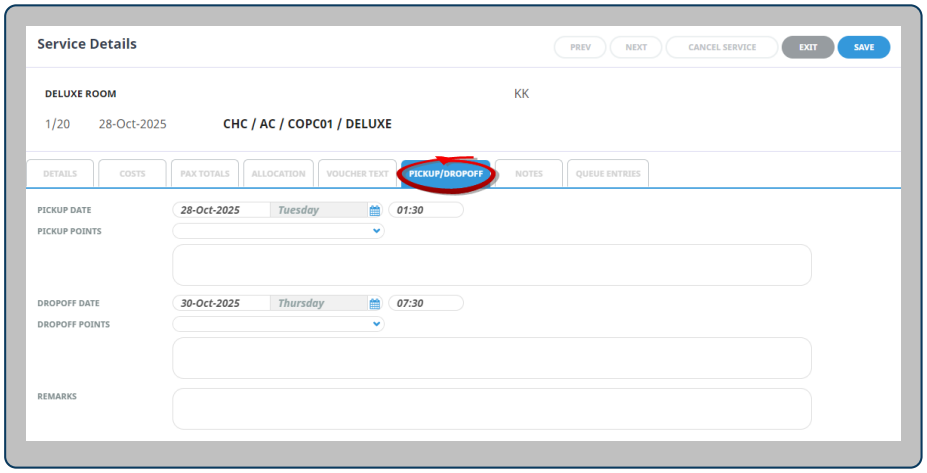
3. There are two ways to add or change pickup/dropoff details from the Itinerary view:
   a. Add or change pickup/dropoff via *service drill-down*:

      i. Select the **service** whose pickup/dropoff details you want to update. This opens the *Service Details* screen.

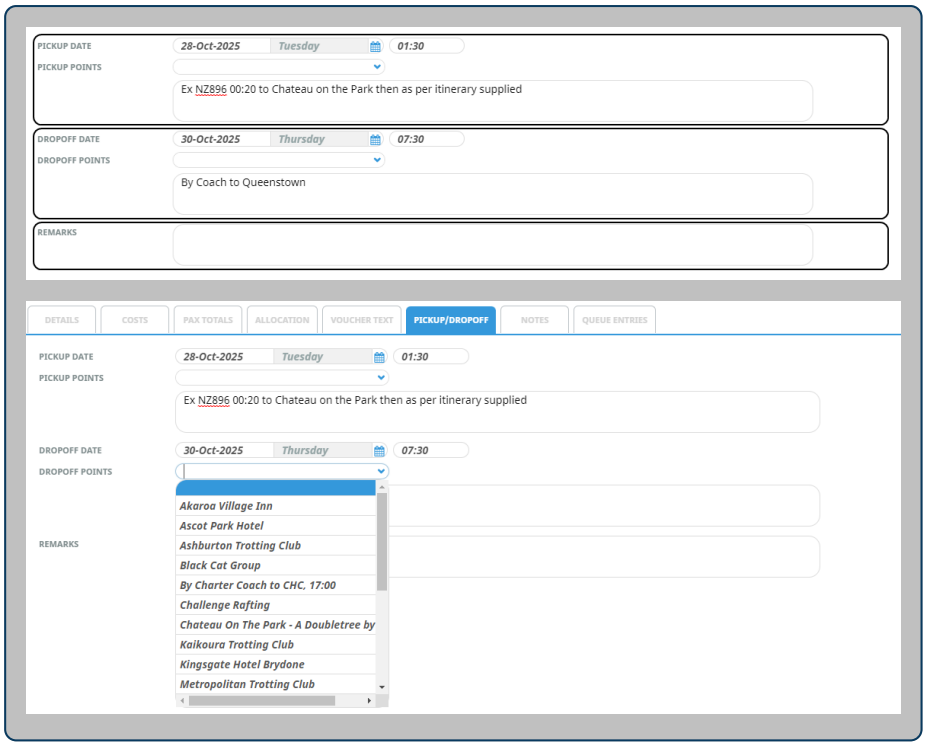


DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

      ii. On the **Service Details** screen, click *the Pickup/Dropoff* tab.



      iii. On the **Pickup/Dropoff** screen, add or edit details as required.

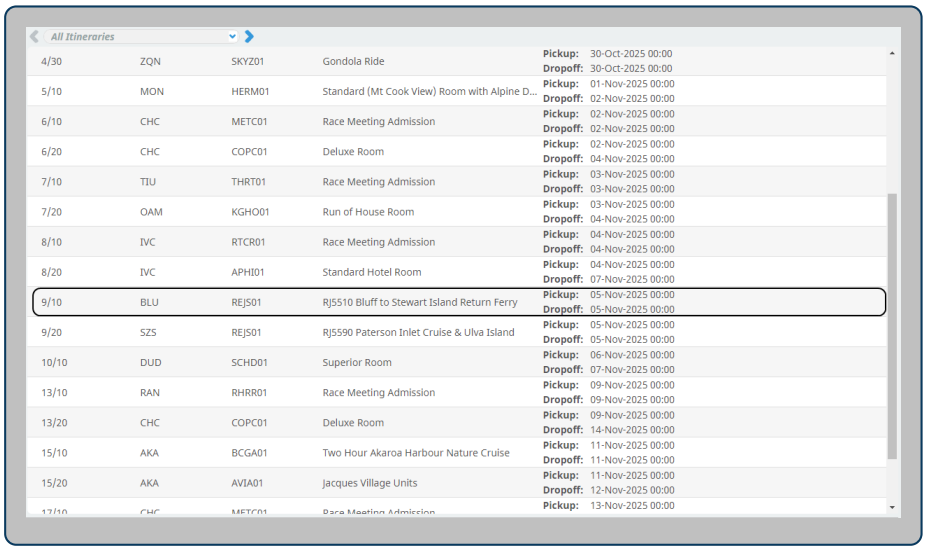


iv. Click *Save* to keep the changes, followed by *Exit* to return to the Itinerary. Or use the *Previous* and *Next* buttons to update other services in the itinerary list.

b. Add or change pickup/dropoff details via the *Groups > Itinerary* menu. This menu allows viewing in a single screen the pickup/dropoff details for services in the booking:

i. Select menu **Groups > Itinerary > Pickup/Dropoff**.

ii. From the **pickup / dropoff** list, click the service whose PU/DO details you want to add or change.



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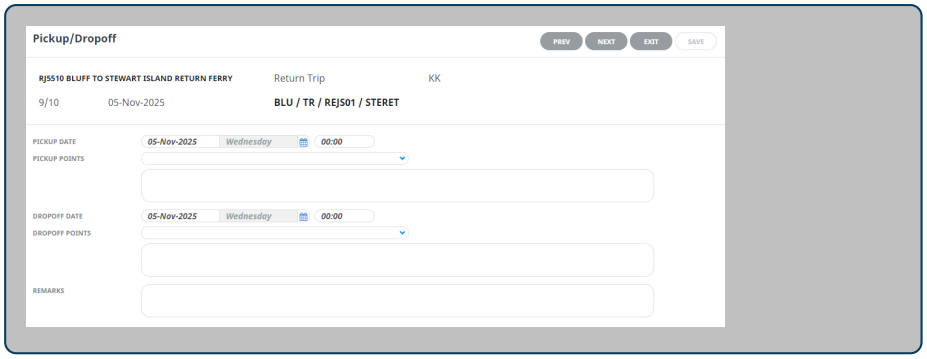
iii. On the **Pickup/Dropoff** screen, add data or edit fields as required.



iv. Click *Save* to keep the changes, followed by *Exit* to return to the list of PU/DO Details, or use the *Previous* and *Next* buttons to update other services in the itinerary list.

NOTE:

- The pickup and drop off dates and times can be edited. When times are output on documentation, the message template can be setup to output them in either 12 or 24 hour format.
- If pickup/dropoff details have been entered into a PCM and the PCM has been copied into the booking, then the pickup/dropoff details as entered in the PCM will be copied into the booking.
- The pickup and drop off dates can be different from the service date. This is so that (e.g.) adjustments can be made to rental vehicle/camper dropoff dates etc. Changing the dates in this screen does not affect the number of days used for the basis of service costing.

  The columns are configurable, by clicking on the white space between the column headings.

At any time, you can add additional services from the Itinerary view via the **Insert New Service** button.

Refer to "Add Services to a Group Booking" on page 32 for more information on adding additional services.

Voucher Text

This is the second of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" above (this task)
3. "Service Notes" on page 111
4. "Product Notes" on page 115
5. "PCM Management Groups" on page 119
6. "Change Travel Date" on page 124
7. "Manage Days" on page 127
8. "Insert Booking" on page 130

The Voucher Text screen allows viewing and editing of the voucher text fields. The voucher text for all services in the booking is displayed and they can be individually selected and edited as required.

NOTE: It is not uncommon for there to be no voucher text attached to services. The actual voucher template setup in Messaging enables most data that is required to be printed on vouchers to be incorporated into the voucher document without needing any additional text in these fields.

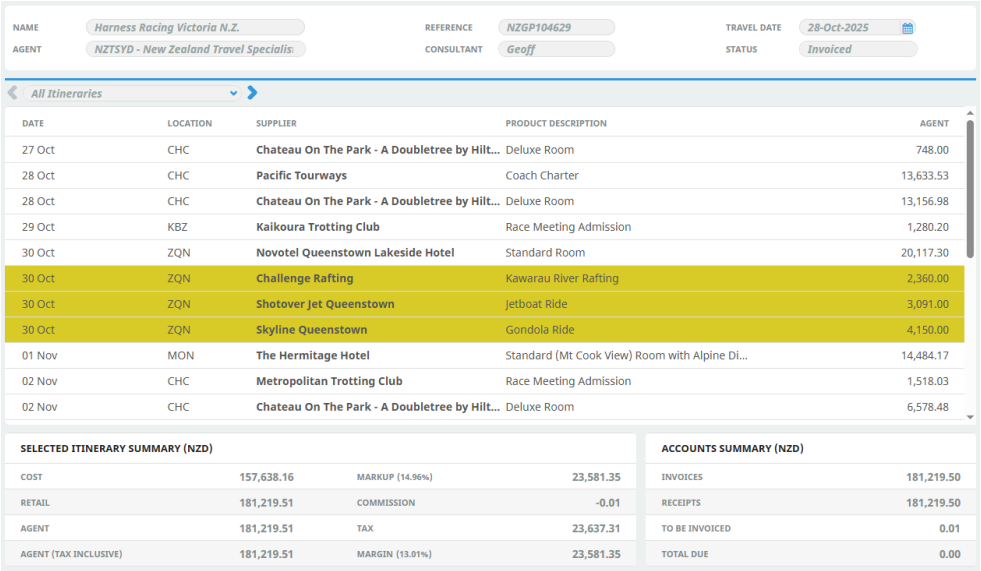
Add or Modify Voucher Text

Make sure you have a booking displayed in Itinerary View.

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. Switch to the **Itinerary View** of the booking via menu *Groups > Itinerary*.

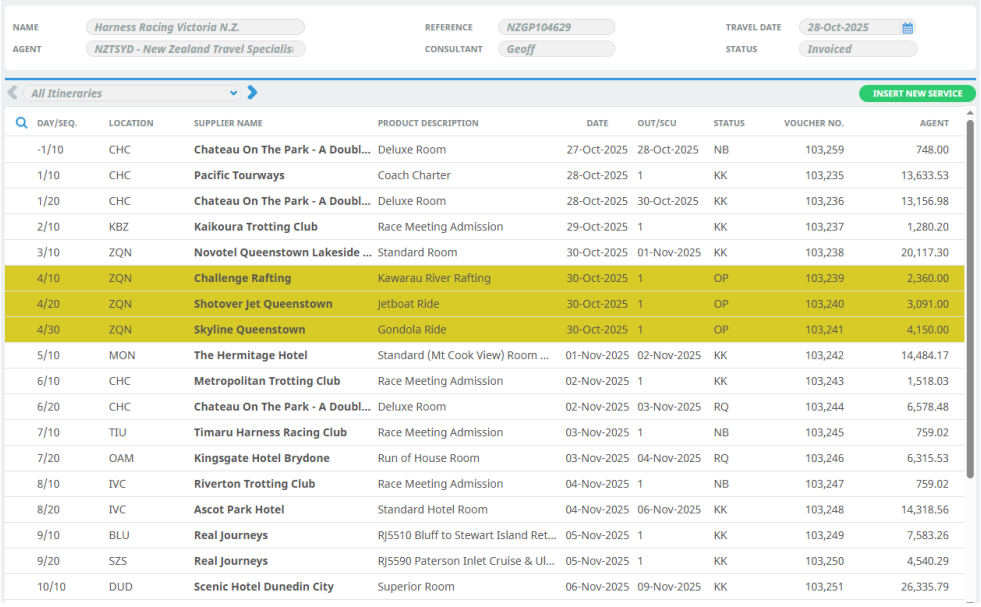
   a. The default view for a Booking is the **Dashboard view**.



   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

   c. Examine the **Itinerary** on this screen.

© Tourplan, 2025



NAME: Harness Racing Victoria N.Z. | REFERENCE: NZGP104629 | TRAVEL DATE: 28-Oct-2025
AGENT: NZTSYD - New Zealand Travel Specialis | CONSULTANT: Geoff | STATUS: Invoiced

All Itineraries | INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
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1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
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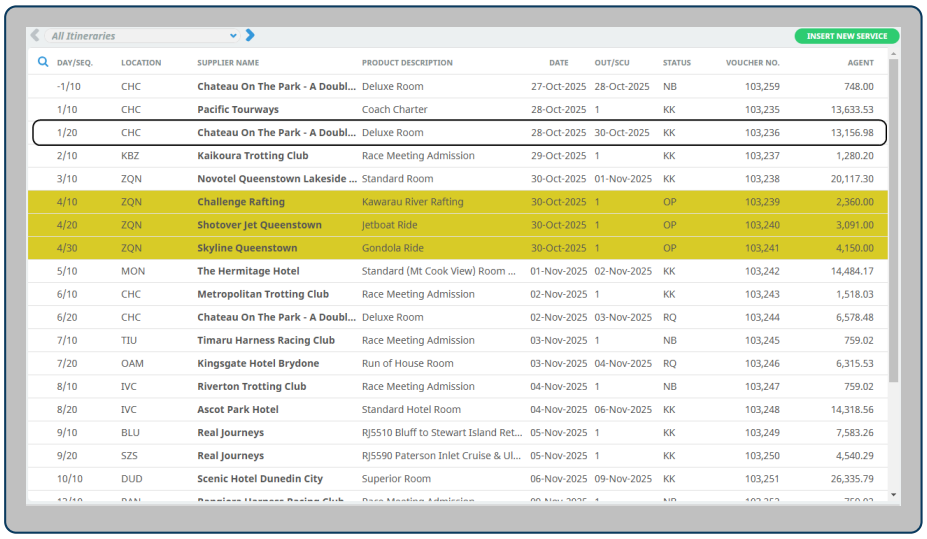
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

3. There are two ways to add or change voucher text from the Itinerary view:
   a. Add or change voucher text via *service drill-down*:
      i. Select the **service** whose voucher text details you want to update to open the *Service Details* screen.



All Itineraries | INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
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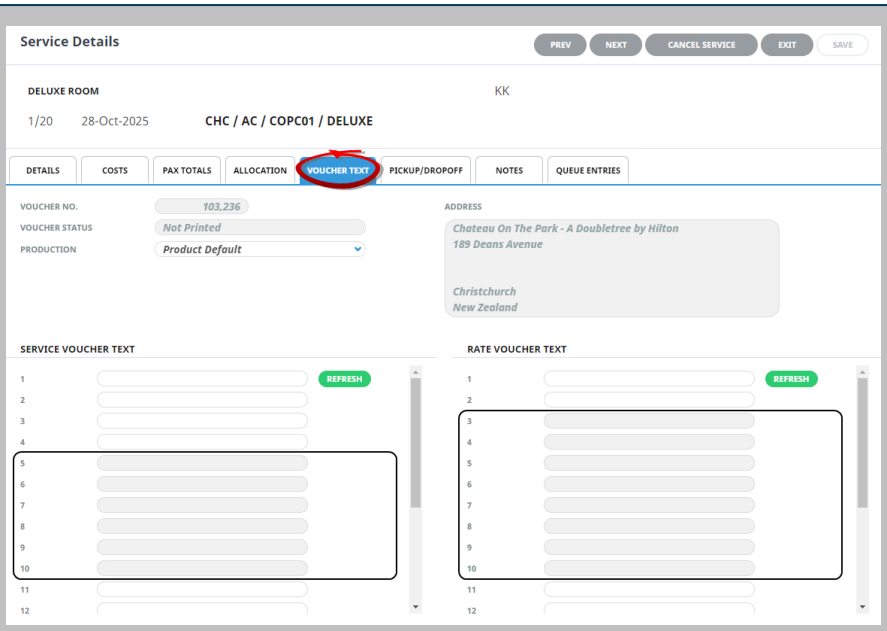
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

      ii. On the Service Details screen, click *the Voucher Text* tab.
      iii. On the **Voucher Text** screen, add or edit details as required.



There are two sets of 20 lines of voucher text; the Service Voucher Text lines are attached to the entire Product (regardless of rate period/price code), and the Rate Voucher Text lines are attached to each of the rate types for each of the Rate Period/Price Codes of the service. This means there can be voucher text that relates to the service in general, and voucher text that applies specifically to a rate, rate period and price code – e.g. information relating to a special, specific promotion taking place for a limited period.

NOTE: In the Service Voucher Text section in this screen shot, only lines 1 - 4 & 11-20 are able to be edited; lines 5 - 10 are dimmed out. The Rate Voucher Text section lines 3-10 are dimmed out.

These settings are made against the Product in the Product Database. Reasons for restricting editing could be (e.g.) the text is a specific discount code that must be on the voucher, or to restrict text being put into fields that are not designed to print on the voucher.

iv. Click *Save* to keep the changes, followed by *Exit* to return to the Itinerary. Or use the *Previous* and *Next* buttons to update other services in the itinerary list.

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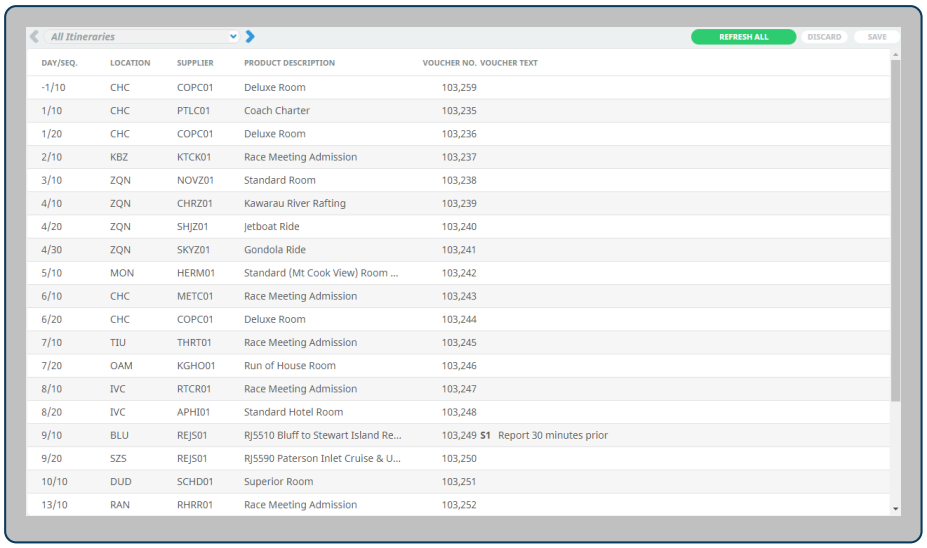
b. Add or change voucher text details via the *Groups menu*:

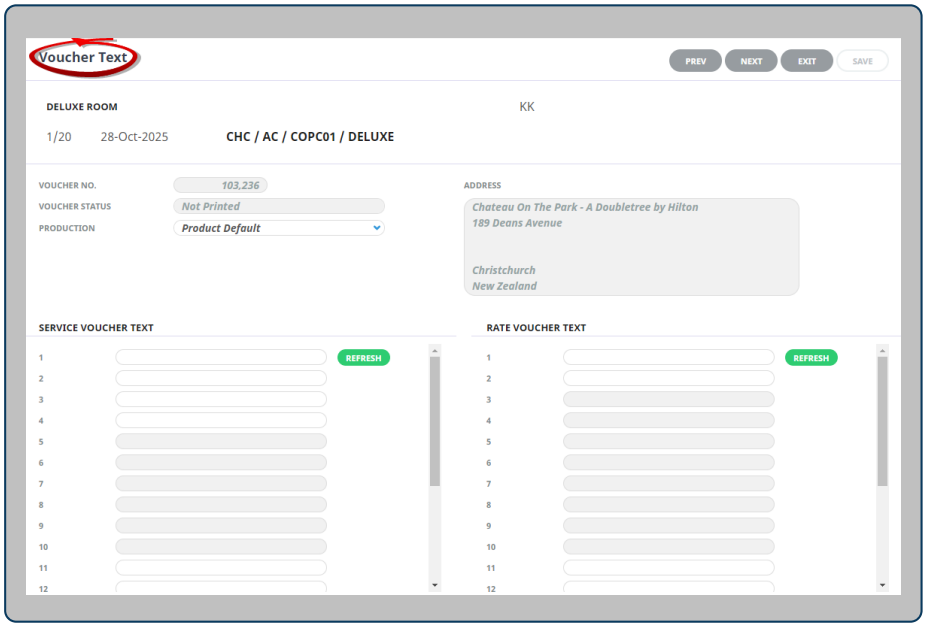
i. Select menu **Groups > Itinerary > Voucher Text**.

ii. Click the **service** whose Voucher details you want to update.



DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	VOUCHER NO.	VOUCHER TEXT
-1/10	CHC	COPC01	Deluxe Room	103,259	
1/10	CHC	PTLC01	Coach Charter	103,235	
1/20	CHC	COPC01	Deluxe Room	103,236	
2/10	KBZ	KTCK01	Race Meeting Admission	103,237	
3/10	ZQN	NOVZ01	Standard Room	103,238	
4/10	ZQN	CHRZ01	Kawarau River Rafting	103,239	
4/20	ZQN	SHJZ01	Jetboat Ride	103,240	
4/30	ZQN	SKYZ01	Gondola Ride	103,241	
5/10	MON	HERM01	Standard (Mt Cook View) Room ...	103,242	
6/10	CHC	METC01	Race Meeting Admission	103,243	
6/20	CHC	COPC01	Deluxe Room	103,244	
7/10	TIU	THRT01	Race Meeting Admission	103,245	
7/20	OAM	KGHO01	Run of House Room	103,246	
8/10	IVC	RTCR01	Race Meeting Admission	103,247	
8/20	IVC	APHI01	Standard Hotel Room	103,248	
9/10	BLU	REJS01	RJ5510 Bluff to Stewart Island Re...	103,249	S1 Report 30 minutes prior
9/20	SZS	REJS01	RJ5590 Paterson Inlet Cruise & U...	103,250	
10/10	DUD	SCHD01	Superior Room	103,251	
13/10	RAN	RHRR01	Race Meeting Admission	103,252	

iii. On the **Voucher Text** screen, add or edit fields as required.



iv. Click *Save* to keep the changes, followed by *Exit* to return to the list of Voucher details.

About the Voucher Text Fields

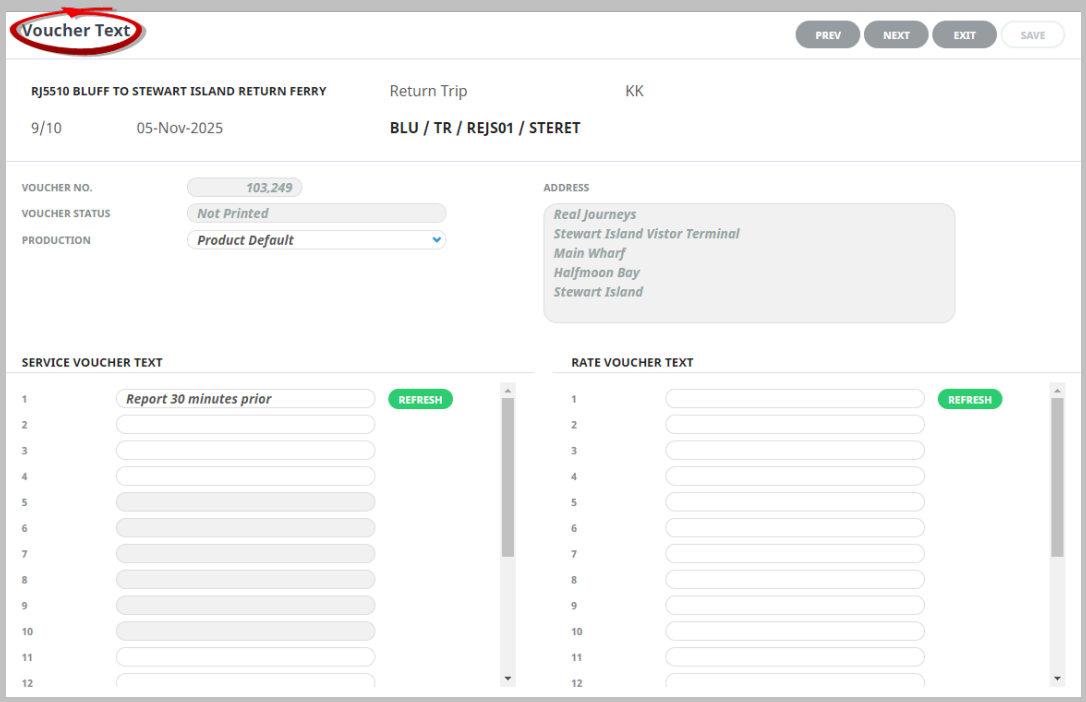
There are two sets of 20 lines of voucher text; one set of 20 lines is attached to the entire Service regardless of rate period/price code and the other second set of 20 lines attached to each of the Rate types for each of the Rate Period/Price Codes of the service.

NOTE:

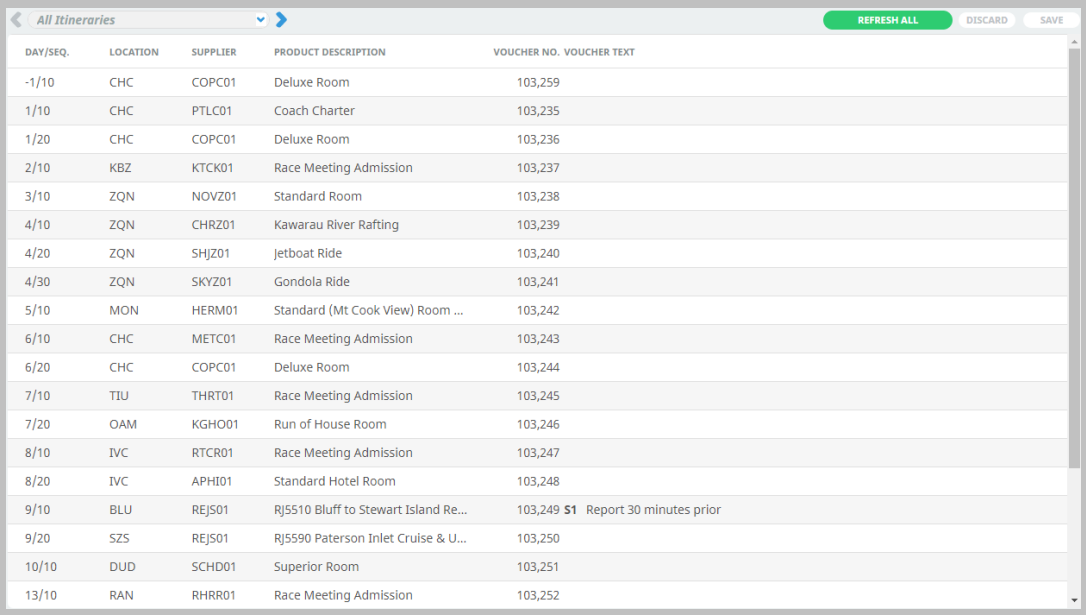
- If text in a field is dimmed out, it is read-only and cannot be edited.
- Any voucher text fields which have items inside <chevron brackets> must *not* be edited. The codes inside the brackets will be translated when the vouchers are output.
- Each voucher text line has a maximum field length of 60 characters (60 Chr). The field outline will turn red when the maximum field length is exceeded.

Example: Voucher Text

Voucher number **103.203** for service **RJ5510 BLUFF TO STEWART ISLAND RETURN FERRY** below has one line of voucher text at Line 1 of the Service Voucher Text and 0 lines of the Rate Voucher Text. This means there can be voucher text which relates to the service in general, but nothing that applies specifically to a rate, rate period or price code; e.g. information relating to a special promotion taking place for a limited period.



When saved the voucher text will display in the service list.



DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	VOUCHER NO.	VOUCHER TEXT
-1/10	CHC	COPC01	Deluxe Room	103,259	
1/10	CHC	PTLC01	Coach Charter	103,235	
1/20	CHC	COPC01	Deluxe Room	103,236	
2/10	KBZ	KTCK01	Race Meeting Admission	103,237	
3/10	ZQN	NOVZ01	Standard Room	103,238	
4/10	ZQN	CHRZ01	Kawarau River Rafting	103,239	
4/20	ZQN	SHJZ01	Jetboat Ride	103,240	
4/30	ZQN	SKYZ01	Gondola Ride	103,241	
5/10	MON	HERM01	Standard (Mt Cook View) Room ...	103,242	
6/10	CHC	METC01	Race Meeting Admission	103,243	
6/20	CHC	COPC01	Deluxe Room	103,244	
7/10	TIU	THRT01	Race Meeting Admission	103,245	
7/20	OAM	KGHO01	Run of House Room	103,246	
8/10	IVC	RTCR01	Race Meeting Admission	103,247	
8/20	IVC	APHI01	Standard Hotel Room	103,248	
9/10	BLU	REJS01	RJ5510 Bluff to Stewart Island Re...	103,249	S1 Report 30 minutes prior
9/20	SZS	REJS01	RJ5590 Paterson Inlet Cruise & U...	103,250	
10/10	DUD	SCHD01	Superior Room	103,251	
13/10	RAN	RHRR01	Race Meeting Admission	103,252	

Refresh buttons

Clicking either of these buttons restores the voucher text of the highlighted service/rate to match what is attached to the service and rate periods in the Services Database; i.e. any edits will be replaced by the original text.

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Service Notes

This is the third of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" on page 106
3. "Service Notes" above (this task)
4. "Product Notes" on page 115
5. "PCM Management Groups" on page 119
6. "Change Travel Date" on page 124
7. "Manage Days" on page 127
8. "Insert Booking" on page 130

The Service Notes screen allows notes *specific to this service, in this booking* to be entered.

The notes entered here can be output on messages; e.g. Agent Confirmation, Vouchers and Supplier Requests etc.

> The note category (in Code Setup) will need to be set to 'Include in Messaging'

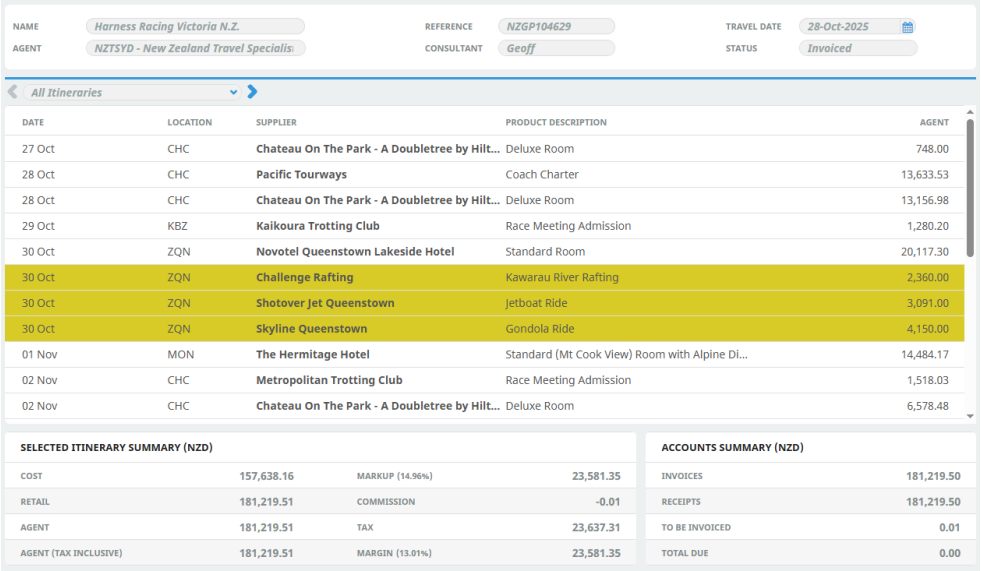
Insert or Update Service Notes

Make sure you have a booking displayed in Itinerary View.

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

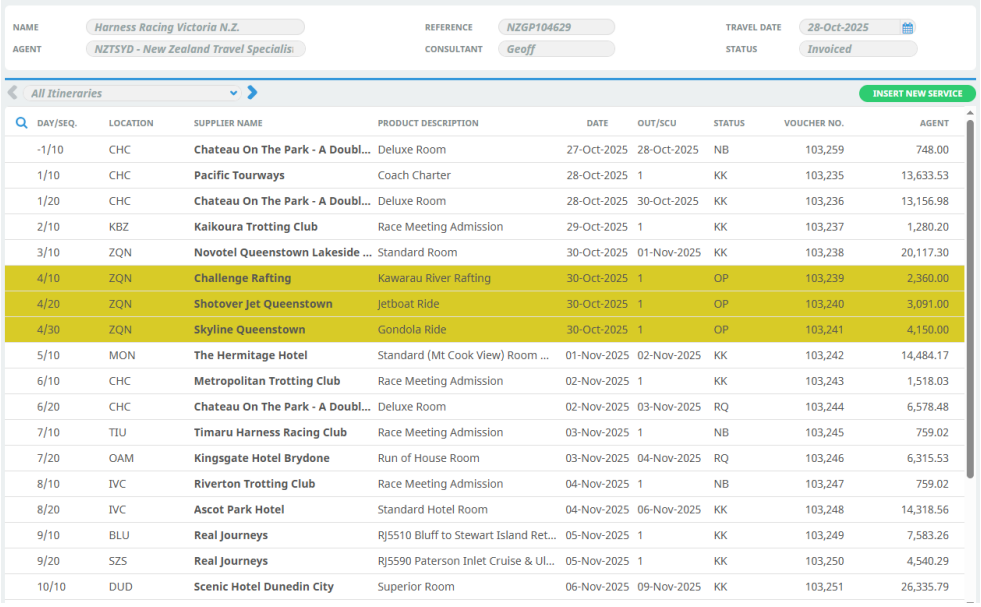
2. Switch to the **Itinerary View** of the booking via menu *Groups* > *Itinerary*.

   a. The default view for a Booking is the **Dashboard view**.



   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

   c. Examine the **Itinerary** on this screen.



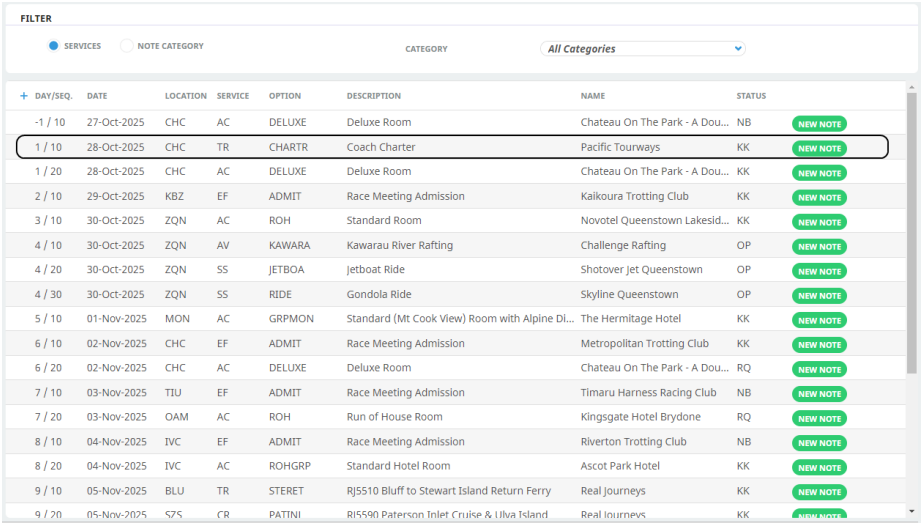
NAME: Harness Racing Victoria N.Z. | REFERENCE: NZGP104629 | TRAVEL DATE: 28-Oct-2025
AGENT: NZTSYD - New Zealand Travel Specialis | CONSULTANT: Geoff | STATUS: Invoiced

All Itineraries | INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

3. There are two ways to change note text from the Itinerary view:
   a. Change or View Note via the *Groups Menu*:
      i. Select menu **Groups > Itinerary > Service Notes**.
      ii. From the list of services, identify the **service line** that is to have a new note added.



FILTER: SERVICES | NOTE CATEGORY | CATEGORY: All Categories

DAY/SEQ.	DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS	
-1 / 10	27-Oct-2025	CHC	AC	DELUXE	Deluxe Room	Chateau On The Park - A Dou...	NB	NEW NOTE
1 / 10	28-Oct-2025	CHC	TR	CHARTR	Coach Charter	Pacific Tourways	KK	NEW NOTE
1 / 20	28-Oct-2025	CHC	AC	DELUXE	Deluxe Room	Chateau On The Park - A Dou...	KK	NEW NOTE
2 / 10	29-Oct-2025	KBZ	EF	ADMIT	Race Meeting Admission	Kaikoura Trotting Club	KK	NEW NOTE
3 / 10	30-Oct-2025	ZQN	AC	ROH	Standard Room	Novotel Queenstown Lakesid...	KK	NEW NOTE
4 / 10	30-Oct-2025	ZQN	AV	KAWARA	Kawarau River Rafting	Challenge Rafting	OP	NEW NOTE
4 / 20	30-Oct-2025	ZQN	SS	JETBOA	Jetboat Ride	Shotover Jet Queenstown	OP	NEW NOTE
4 / 30	30-Oct-2025	ZQN	SS	RIDE	Gondola Ride	Skyline Queenstown	OP	NEW NOTE
5 / 10	01-Nov-2025	MON	AC	GRPMON	Standard (Mt Cook View) Room with Alpine Di...	The Hermitage Hotel	KK	NEW NOTE
6 / 10	02-Nov-2025	CHC	EF	ADMIT	Race Meeting Admission	Metropolitan Trotting Club	KK	NEW NOTE
6 / 20	02-Nov-2025	CHC	AC	DELUXE	Deluxe Room	Chateau On The Park - A Dou...	RQ	NEW NOTE
7 / 10	03-Nov-2025	TIU	EF	ADMIT	Race Meeting Admission	Timaru Harness Racing Club	NB	NEW NOTE
7 / 20	03-Nov-2025	OAM	AC	ROH	Run of House Room	Kingsgate Hotel Brydone	RQ	NEW NOTE
8 / 10	04-Nov-2025	IVC	EF	ADMIT	Race Meeting Admission	Riverton Trotting Club	NB	NEW NOTE
8 / 20	04-Nov-2025	IVC	AC	ROHGRP	Standard Hotel Room	Ascot Park Hotel	KK	NEW NOTE
9 / 10	05-Nov-2025	BLU	TR	STERET	RJ5510 Bluff to Stewart Island Return Ferry	Real Journeys	KK	NEW NOTE
9 / 20	05-Nov-2025	SZS	CR	PATINL	RJ5590 Paterson Inlet Cruise & Ulva Island	Real Journeys	KK	NEW NOTE

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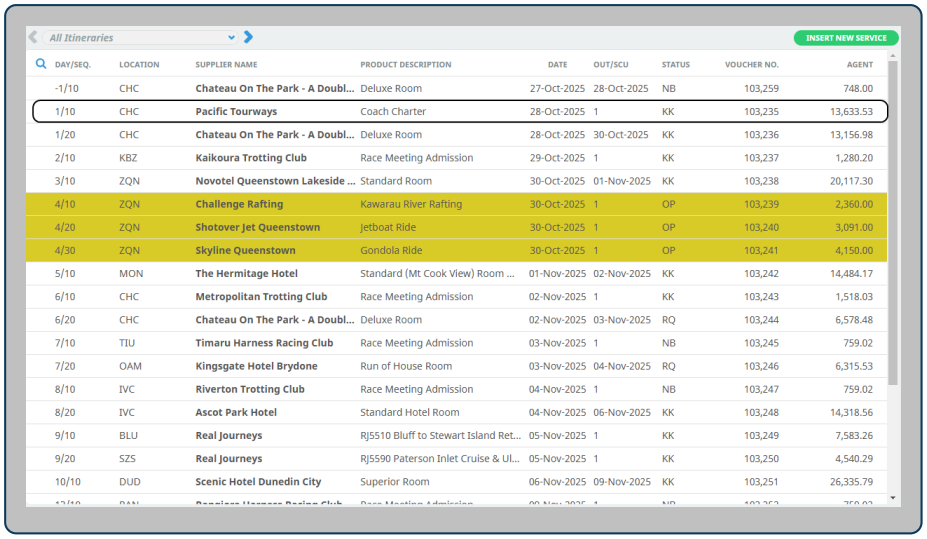
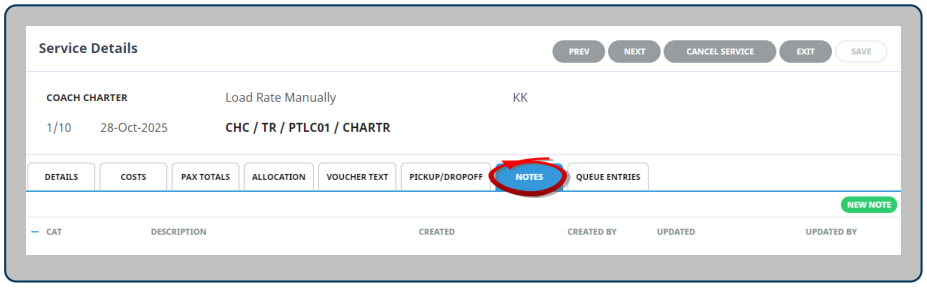
b. Change Service Note details via the *service line drill-down*

i. Select the **service line** whose details you want to change to open the **Service Details** screen.

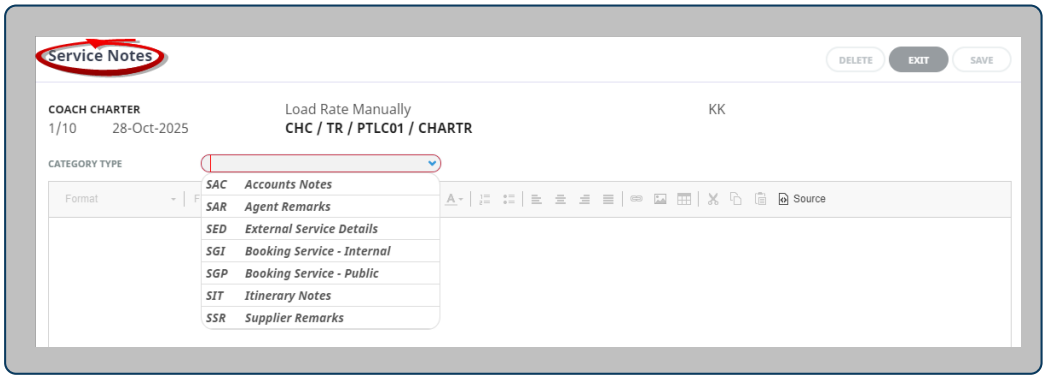


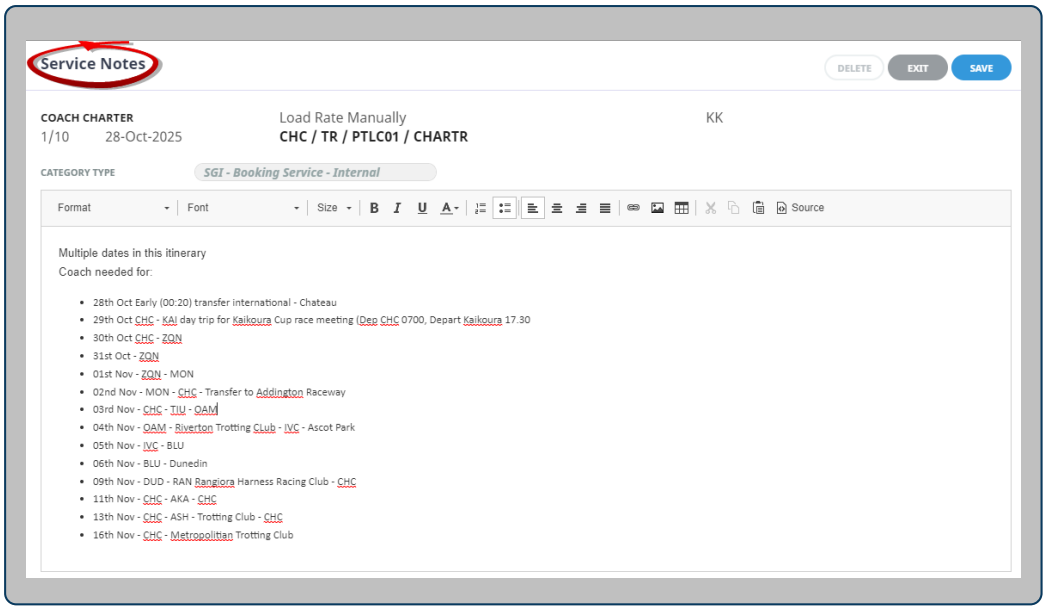
ii. Click the **Note** tab.



4. To add a note for a service, click **New Note** alongside the service.

5. On the **Service Notes** screen, select a Category Type from the drop-down and enter the text of the note as illustrated in the example.





Once details are entered, click *Save* to keep the note and return to the list, otherwise, click *Exit*.

NOTE:

- The service note inserted in the example above is an *internal* note, which will not be output on any documentation.
- There could be many more categories of Service Notes – for example, one for general information; one for accounts information; one for additional itinerary information. By clicking on each of these categories, the notes that have previously been entered (if any) for the service can be viewed.
- Unlimited text can be added under each category. A Date and Time stamp will be attached to each Note, reflecting the last time it was updated.

The Note categories must first be setup in Code Setup.

(see System Setup User Manual Messaging > Notes).

Service Note Filtering

The Service Note filter is defaulted with the Services button checked. Filtering by Service allows a full list of all notes attached to each product to display on screen.

A filter can be applied to target and display a specific Note Category. This is useful for consultants who may want to view or insert a series of service notes with information saved for a particular Note Category.

- Filtered note entries can be can be viewed service by service using the dropdown arrow. The note expands for users and longer note entries can be viewed using the scroll bar provided.
- Alternatively, users can open the Product Note screen to view the full note entry when selecting the magnifying glass icon.
- Selecting the + icon next to the Category will expand notes for all services.

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Product Notes

This is the fourth of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" on page 106
3. "Service Notes" on page 111
4. "Product Notes" above (this task)
5. "PCM Management Groups" on page 119
6. "Change Travel Date" on page 124
7. "Manage Days" on page 127
8. "Insert Booking" on page 130

The Product Notes screen allows **viewing only** of any notes that might be attached to a product. Adding, modifying or deleting product notes is done via Product Setup (see the Product User Manual).

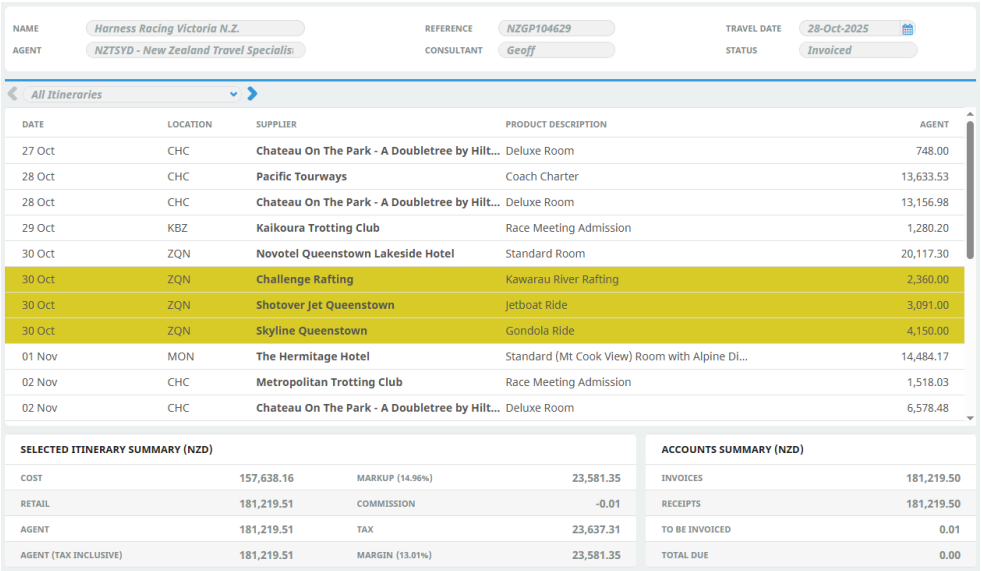
View Product Notes

Make sure you have a booking displayed in Itinerary View.

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

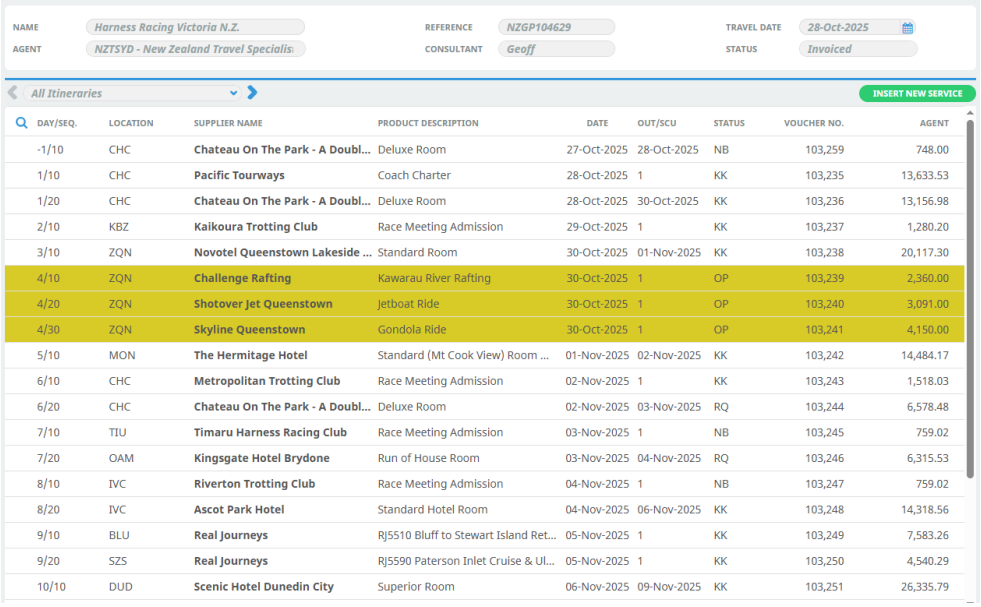
2. Switch to the **Itinerary View** of the booking via menu *Groups > Itinerary*.

   a. The default view for a Booking is the **Dashboard view**.



   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

   c. Examine the **Itinerary** on this screen.



NAME: Harness Racing Victoria N.Z.
AGENT: NZTSYD - New Zealand Travel Specialis
REFERENCE: NZGP104629
CONSULTANT: Geoff
TRAVEL DATE: 28-Oct-2025
STATUS: Invoiced

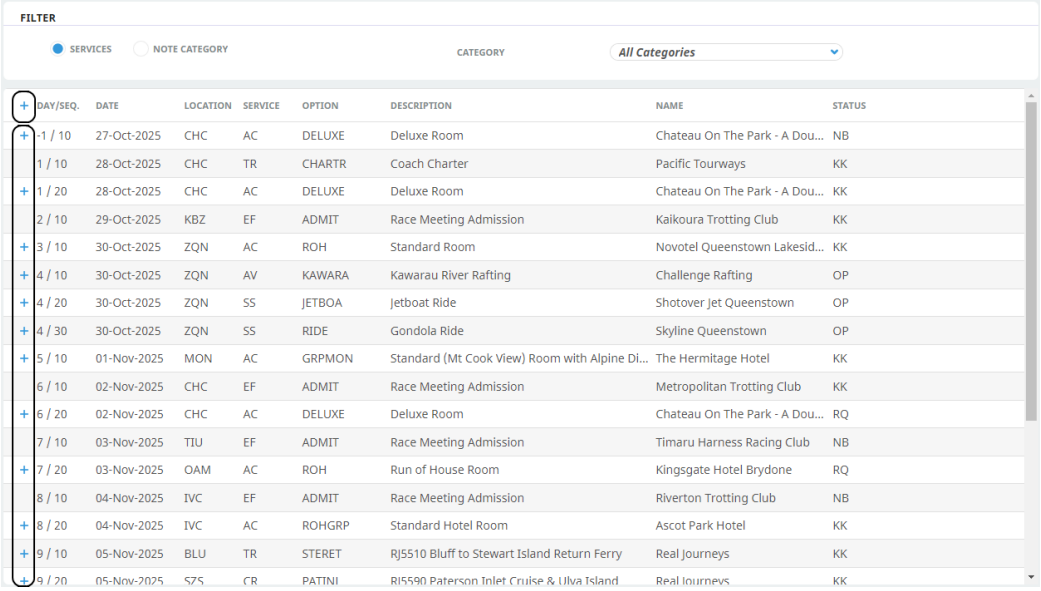
All Itineraries — INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

3. Select menu **Groups > Itinerary > Product Notes**.

4. From the list of services, click the **service** whose product notes you want to view in detail.



FILTER
SERVICES | NOTE CATEGORY | CATEGORY: All Categories

+	DAY/SEQ.	DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS
+	-1 / 10	27-Oct-2025	CHC	AC	DELUXE	Deluxe Room	Chateau On The Park - A Dou...	NB
	1 / 10	28-Oct-2025	CHC	TR	CHARTR	Coach Charter	Pacific Tourways	KK
+	1 / 20	28-Oct-2025	CHC	AC	DELUXE	Deluxe Room	Chateau On The Park - A Dou...	KK
	2 / 10	29-Oct-2025	KBZ	EF	ADMIT	Race Meeting Admission	Kaikoura Trotting Club	KK
+	3 / 10	30-Oct-2025	ZQN	AC	ROH	Standard Room	Novotel Queenstown Lakesid...	KK
+	4 / 10	30-Oct-2025	ZQN	AV	KAWARA	Kawarau River Rafting	Challenge Rafting	OP
+	4 / 20	30-Oct-2025	ZQN	SS	JETBOA	Jetboat Ride	Shotover Jet Queenstown	OP
+	4 / 30	30-Oct-2025	ZQN	SS	RIDE	Gondola Ride	Skyline Queenstown	OP
+	5 / 10	01-Nov-2025	MON	AC	GRPMON	Standard (Mt Cook View) Room with Alpine Di...	The Hermitage Hotel	KK
	6 / 10	02-Nov-2025	CHC	EF	ADMIT	Race Meeting Admission	Metropolitan Trotting Club	KK
+	6 / 20	02-Nov-2025	CHC	AC	DELUXE	Deluxe Room	Chateau On The Park - A Dou...	RQ
	7 / 10	03-Nov-2025	TIU	EF	ADMIT	Race Meeting Admission	Timaru Harness Racing Club	NB
+	7 / 20	03-Nov-2025	OAM	AC	ROH	Run of House Room	Kingsgate Hotel Brydone	RQ
	8 / 10	04-Nov-2025	IVC	EF	ADMIT	Race Meeting Admission	Riverton Trotting Club	NB
+	8 / 20	04-Nov-2025	IVC	AC	ROHGRP	Standard Hotel Room	Ascot Park Hotel	KK
+	9 / 10	05-Nov-2025	BLU	TR	STERET	RJ5510 Bluff to Stewart Island Return Ferry	Real Journeys	KK
+	9 / 20	05-Nov-2025	SZS	CR	PATINI	RJ5590 Paterson Inlet Cruise & Ulva Island	Real Journeys	KK

5. From the detailed list, view product notes by **expanding them** (i.e. clicking the **+** icon). Any images associated with the note will also be visible once expanded at this level.

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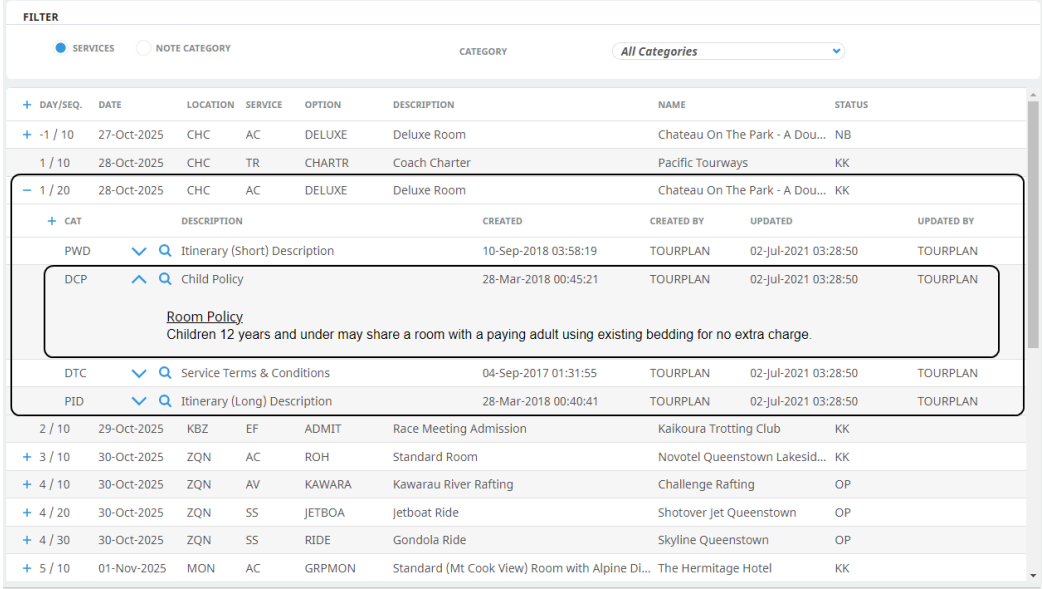


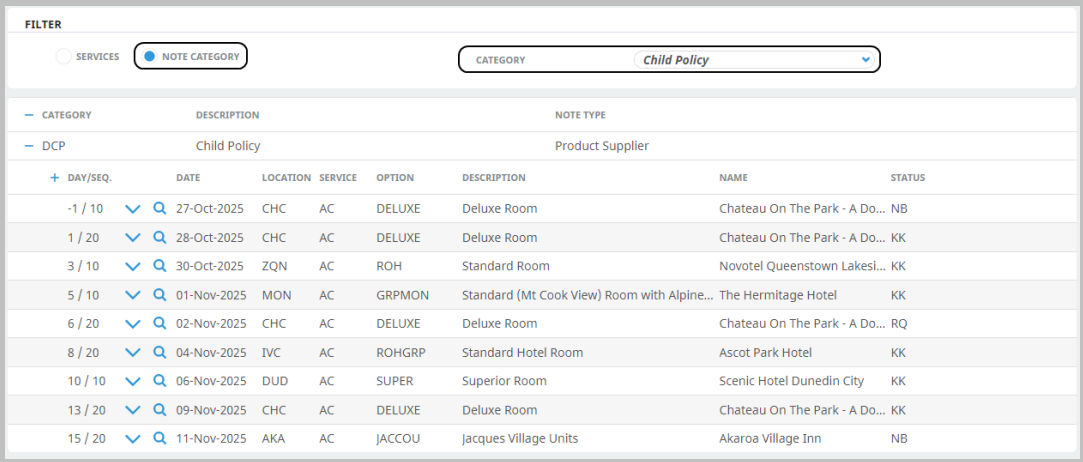
From the expanded list, view text associated with each note by clicking the **down** icon.

Note Filtering

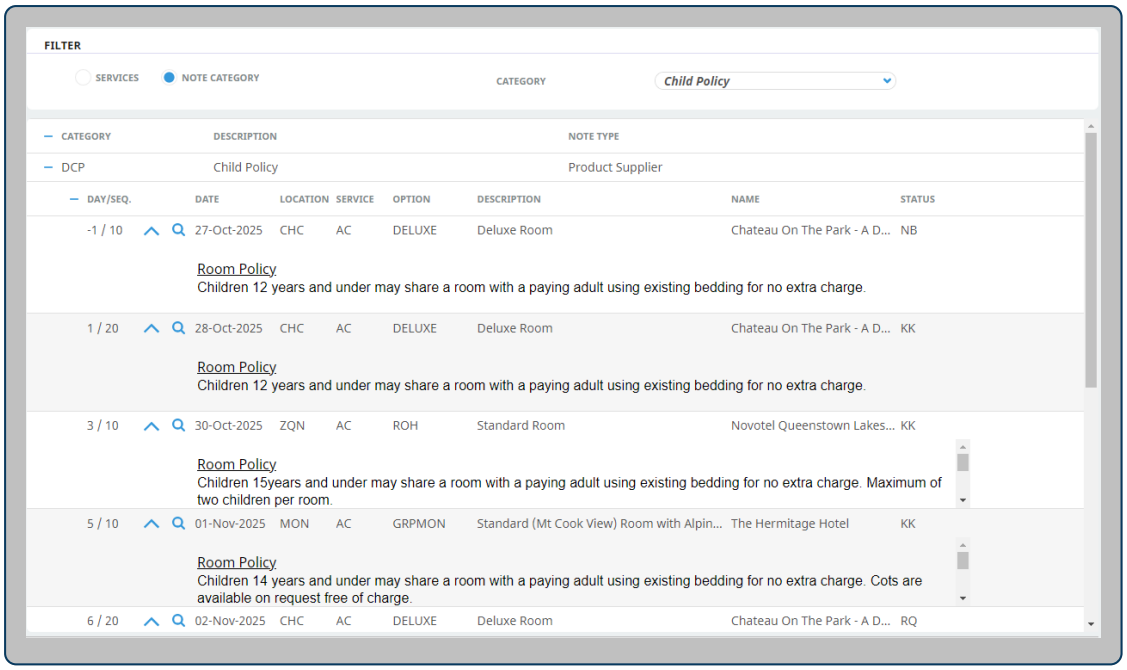
The Product Note filter is defaulted with the Services button checked. Filtering by Service allows a full list of all notes, attached to each product to display on screen.

A filter can be applied to target and display a specific Note Category. This is useful for consultants who may want to view a series of services with information saved for a particular Note Category.

The example below filters by a Note Category selected called *Child Policy*. A list of Child Policy notes attached to itinerary products displays as the note category code has been expanded.



- Filtered note entries can be can be viewed service by service using the dropdown arrow. The note expands for users and longer note entries can be viewed using the scroll bar provided.
- Alternatively, users can open the Product Note screen to view the full note entry when selecting the magnifying glass icon.
- Selecting the + icon next to the Category will expand notes for all services.



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PCM Management Groups

This is the fifth of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" on page 106
3. "Service Notes" on page 111
4. "Product Notes" on page 115
5. "PCM Management Groups" above (this task)
6. "Change Travel Date" on page 124
7. "Manage Days" on page 127
8. "Insert Booking" on page 130

PCMs (Pre-Costed Modules/Quotes) can be 'copied' into a booking. This can save time and effort in a number of ways:

- A quote that has been produced in PCMs can be copied into a booking in a simple one-step process - without having to insert the individual services.
- A collection of services that are frequently used in bookings; e.g., Meet & Greet Fee, Transfer etc. - can be put into a PCM and inserted into bookings, which is a quicker method than inserting the individual services.

NOTE: Inserting a PCM into a booking is not the same procedure as making a Package Booking. Packages are covered in detail in the PCM Packages User Manual.

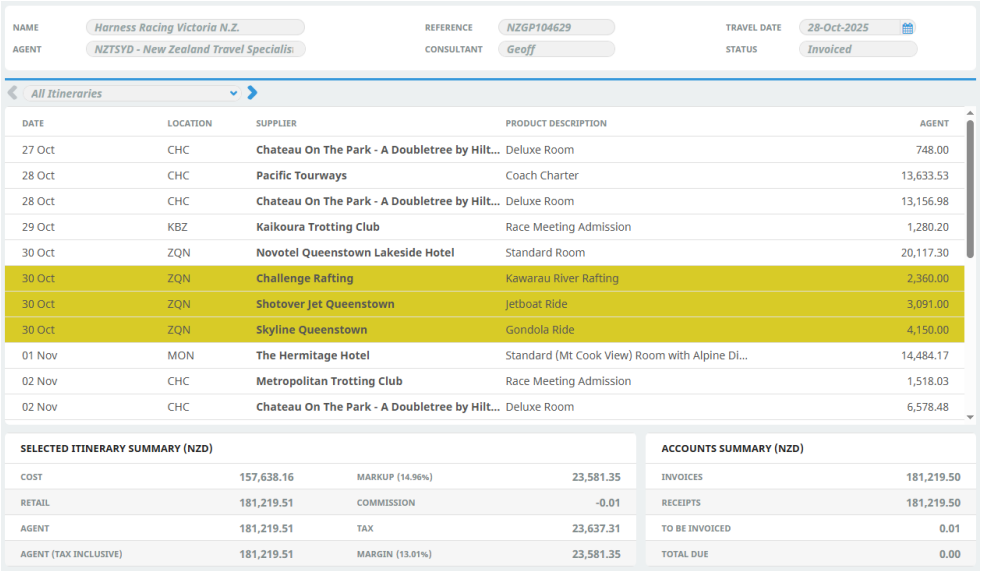
Manage PCM Information

Make sure you have a booking displayed in Itinerary View.

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

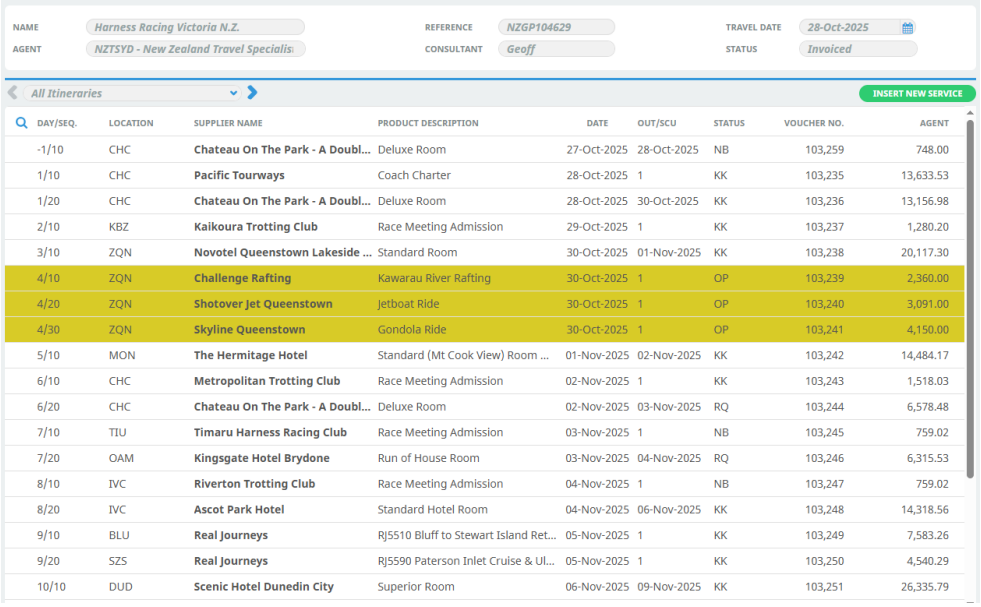
2. Switch to the **Itinerary View** of the booking via menu *Groups > Itinerary*.

   a. The default view for a Booking is the **Dashboard view**.



   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

   c. Examine the **Itinerary** on this screen.

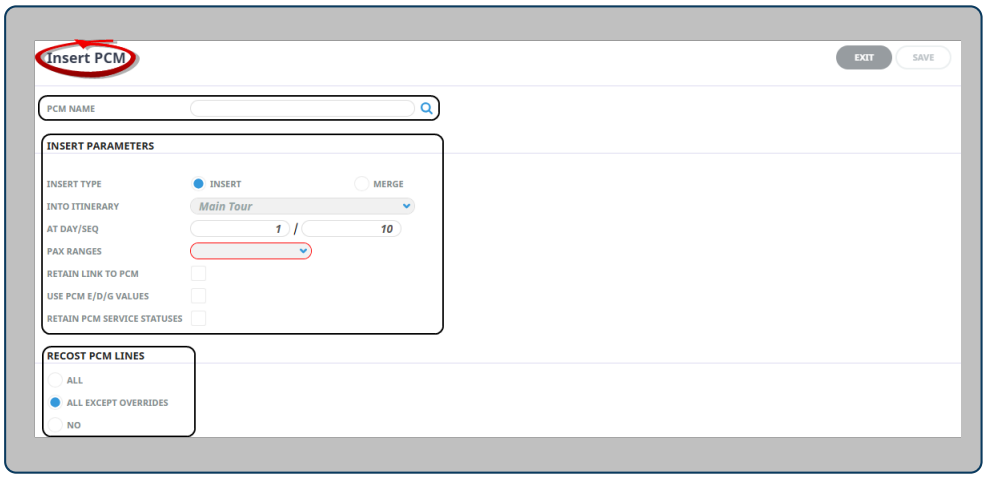


DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

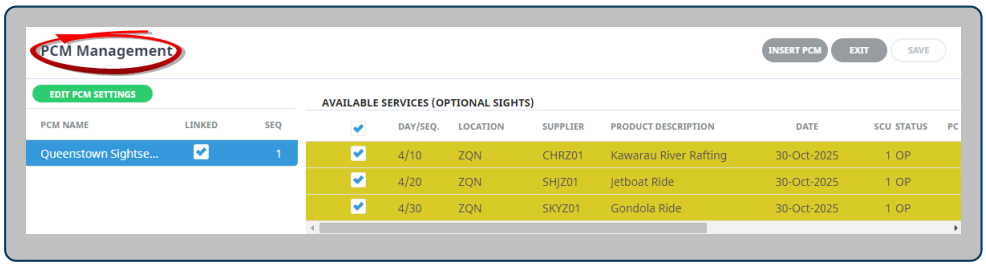
NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

3. Select menu **Groups > Itinerary > PCM Management**.

   a. If there is no existing PCM in the booking, the **Insert PCM** screen is displayed.



   b. If a PCM does exist for this booking, the **PCM Management** screen is displayed.



4. For a new PCM, click **Insert PCM**, enter the name of the PCM in the PCM Name field (you can also search for existing PCMs). Complete all other fields as required (see the Insert PCM example above) and click *Save* to attach this PCM.

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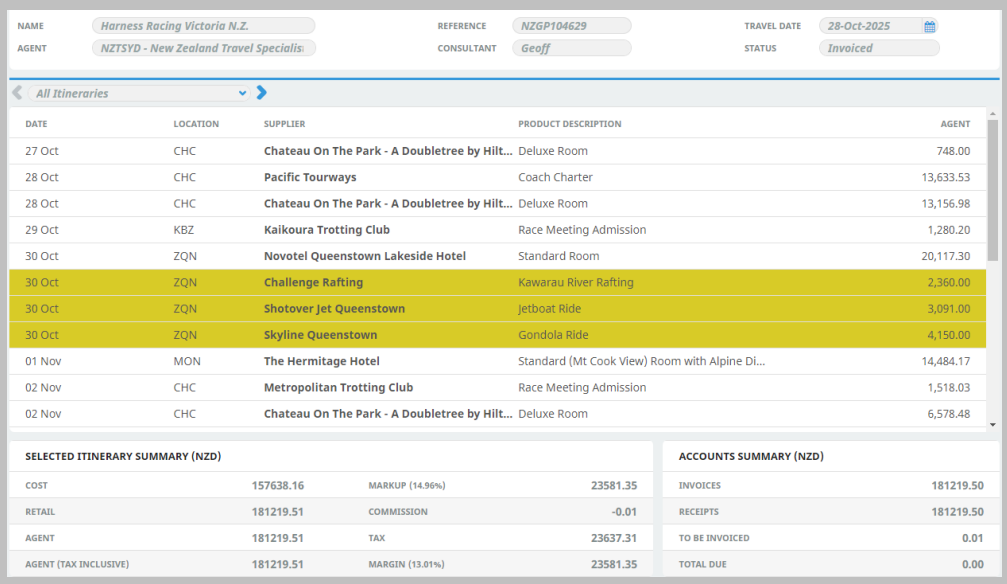
5. The services included in the PCM appear in the booking for the itinerary selected.

> Highlighted (i.e. coloured) services indicate that they have a special status, which has been configured to display in a particular colour when attached to a booking. In this case, the services are Optional Services; i.e. they have the Optional Service status attached, and that status is configured to display in this particular colour.
>
> Any service in the booking - whether from a PCM or manually inserted - inherits that colour if the Optional Service Status is applied to the service line.

Refer to System Setup User Manual for information on configuring service line statuses and colours.

Example 1, **All Itineraries**.



NAME: Harness Racing Victoria N.Z. | REFERENCE: NZGP104629 | TRAVEL DATE: 28-Oct-2025
AGENT: NZTSYD - New Zealand Travel Specialis | CONSULTANT: Geoff | STATUS: Invoiced

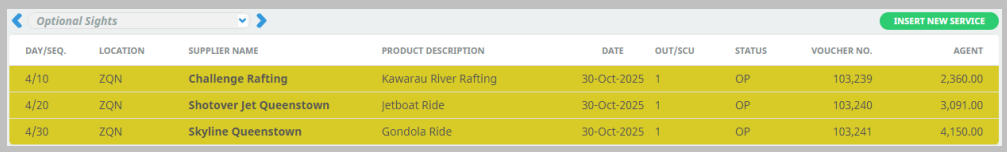
All Itineraries

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
27 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	748.00
28 Oct	CHC	Pacific Tourways	Coach Charter	13,633.53
28 Oct	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	13,156.98
29 Oct	KBZ	Kaikoura Trotting Club	Race Meeting Admission	1,280.20
30 Oct	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	20,117.30
30 Oct	ZQN	Challenge Rafting	Kawarau River Rafting	2,360.00
30 Oct	ZQN	Shotover Jet Queenstown	Jetboat Ride	3,091.00
30 Oct	ZQN	Skyline Queenstown	Gondola Ride	4,150.00
01 Nov	MON	The Hermitage Hotel	Standard (Mt Cook View) Room with Alpine Di...	14,484.17
02 Nov	CHC	Metropolitan Trotting Club	Race Meeting Admission	1,518.03
02 Nov	CHC	Chateau On The Park - A Doubletree by Hilt...	Deluxe Room	6,578.48

SELECTED ITINERARY SUMMARY (NZD)			
COST	157638.16	MARKUP (14.96%)	23581.35
RETAIL	181219.51	COMMISSION	-0.01
AGENT	181219.51	TAX	23637.31
AGENT (TAX INCLUSIVE)	181219.51	MARGIN (13.01%)	23581.35

ACCOUNTS SUMMARY (NZD)	
INVOICES	181219.50
RECEIPTS	181219.50
TO BE INVOICED	0.01
TOTAL DUE	0.00

Example 2, **Optional Sights** itinerary.



Optional Sights | INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00

6. When you are done modifying a PCM, click **Save**.

Existing PCMs can be modified or new ones added via the **Edit PCM** and **Insert PCM** buttons respectively.

> If there is more than one PCM that has been inserted into the Booking, then they are listed under the **PCM Name** column. Only services that belong to the currently highlighted PCM are displayed under **Available Services**.

If you are inserting a PCM package which has been deleted a warning message displays: *Warning - The booking was connected to a PCM/Package that has been deleted. You should recalculate the booking*.
Additionally if you are changing a passengers age to one that is not allowed by a packaged service rate policy a message displays detailing the service line Sequence Number, the Service Code, Supplier and Product Code and the Rate Policy ID for example: *1009 Error updating booking 0000: Pax age X are not allowed for the option XX XXXXXX XXXXX using policy with RatePolicyID=0000. (Service 1/10, XX XXXXXX XXXXXX.*

About the PCM Management Fields

PCM Name

In the example, a Queenstown Sightseeing One Day Package has been entered into the booking. The services that display are all part of that package - it is irrelevant that a package has been used in the example; the services could quite as easily have been entered individually.

Insert Type

- **Insert** - Renumbers the existing booking service day and sequence numbers if necessary when inserting the PCM. This means that if a 3-day PCM is inserted at (e.g.) Day 4, Sequence 10, then services already in the booking on Day 4 will become Day 7.
- **Merge** - Does not renumber the existing booking services – instead, the PCM services are renumbered to “fit around” the existing booking services. This option may be used, for example, when the accommodation services have been manually added to a booking and a package of sightseeing services is to be inserted from a PCM.

Into Itinerary

Itinerary name where the PCM is to be inserted.

At Day/Seq

The Day and Sequence Number where the PCM is to be inserted.

NOTE: The insert will take place at the day/sequence specified. This means that if (e.g.) a PCM was to be inserted at 4/10, then the first service from the copied-in PCM would become Day 4/Sequence 10. On an Insert, this would push the service that was 4/10 down the list to be the first service after the newly inserted PCM Services.

Pax Ranges

The Pax Ranges from the selected PCM are displayed in the drop down. Choose the closest match to the number of Pax in the booking. The costs will be taken from that Pax Range when inserting the services into the booking.

NOTE: On the Insert PCM screen, this appears as a mandatory field - a selection must be made from the drop-down.

Retain PCM Service Statuses

- **Unchecked** - inserts PCM services into the booking using the default Service Status defined in Code Setup. If any services within the PCM have a Service Status configured to exclude them from the PCM Total (e.g., optional services), they will be inserted into the Booking inheriting the same Service Status as the parent PCM Service Statuses.
- **Checked** - retains the service statuses in the booking to match those defined in the PCM. This ensures each service is inserted with the same status it has in the PCM configuration.

NOTE: For more information on Service Status configuration please see System Setup User Manual.

Retain Link to PCM

If the PCM is ‘Linked’, it means that the PCM is to be inserted into the booking at exactly the PCM price – regardless if any of the PCM services that are copied into the booking are later altered, deleted or substituted.

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NOTE: Linking the Booking to the PCM means that (e.g.) if the PCM being inserted was a quotation, then the quoted prices can be held. There are also some advantages in using this method of processing a package booking when the contents and length of the package need to be altered substantially.

Use PCM EDG Values

When checked, the copy of the PCM service lines into the booking will obey any Escort, Driver or Guide values which may have been changed in the PCM. e.g., if a Guide had been manually added to one service and the defaults for Guides in the service in the Product Database are set to (N)o, the value from the PCM will be used. If unchecked, the guide value would be reset to 0.

Recost PCM Lines

- **All** - Tourplan will re-cost the services based on current Product Database values. If the Cost values are different from the cost values in the PCM lines, then the lines will be updated with the new cost values when they are copied in. If the Link to the PCM is to be retained, the Sell values will not be updated. If the link to the PCM is not retained, the Sell values will also be updated.
- **All Except Overrides** - As for 'All' except any rate which has manually overridden in the PCM will be retained as is.
- **No** - The existing PCM costs will be recalculated based on the number of pax in the booking.

Change Travel Date

This is the sixth of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" on page 106
3. "Service Notes" on page 111
4. "Product Notes" on page 115
5. "PCM Management Groups" on page 119
6. "Change Travel Date" above (this task)
7. "Manage Days" on page 127
8. "Insert Booking" on page 130

This screen allows changes to be made to the booking travel date.

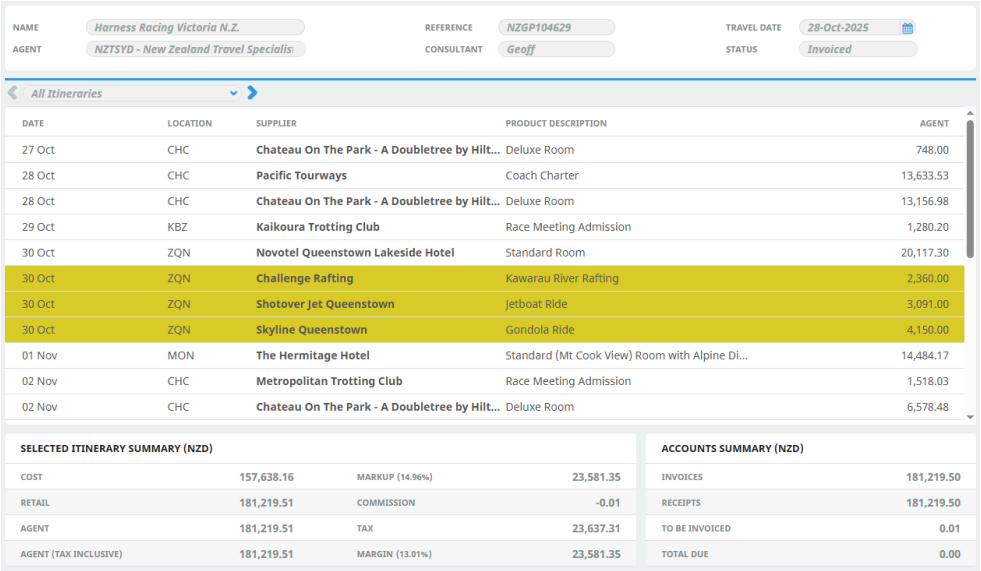
Change Travel Date

Make sure you have a booking displayed in Itinerary View.

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. Switch to the **Itinerary View** of the booking via menu *Groups > Itinerary*.

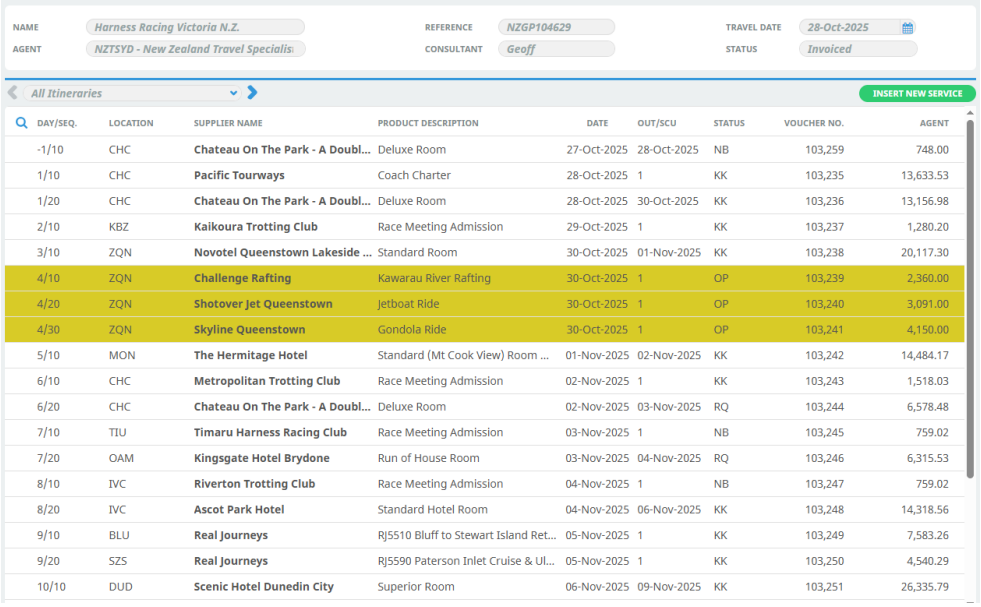
   a. The default view for a Booking is the **Dashboard view**.



   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

   c. Examine the **Itinerary** on this screen.

© Tourplan, 2025



NAME: Harness Racing Victoria N.Z. | REFERENCE: NZGP104629 | TRAVEL DATE: 28-Oct-2025
AGENT: NZTSYD - New Zealand Travel Specialis | CONSULTANT: Geoff | STATUS: Invoiced

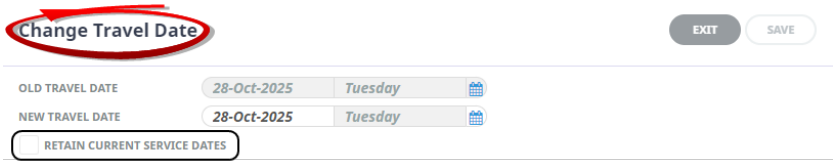
All Itineraries | INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

3. Select menu **Groups > Itinerary > Change Travel Date**.

4. On the **Change Travel Date** screen, enter a New Travel Date and click *Save*.



5. If the **Recalculate Booking** screen appears, select the relevant option (i.e. *Replace All*, *Replace All But Overrides* or *No Prices*) and click **Yes**.

> If **Recalculate Booking** does pop-up, then Tourplan has determined that a recalculation is required. It's not possible to change travel dates without a recalculation unless current service dates are retained.

About Retain Current Service Dates

Unchecked

Leaving the 'Retain Current Service Dates' unchecked indicates to the system that the dates of all services in the booking will be changed to reflect the new Travel Date; i.e., the services at Day 1 will inherit the new travel date; the services at day 2 will become new travel date + 1 day and so on.

When OK is clicked, Tourplan will prompt to re-cost the Booking. The choices are:

- *Replace All* – changes the Booking Header date and all service dates and re-costs all services for the revised travel dates.
- *All Except Overrides* – as above however does not re-cost services where the original database 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* – This check-box can be used to update the booking values with any changes in exchange rates between service and booking currencies.

Any accounting transactions which do exist will retain their existing posting periods – they will *not* be updated to reflect the new travel date period, should the travel date be changed into a different accounting period.

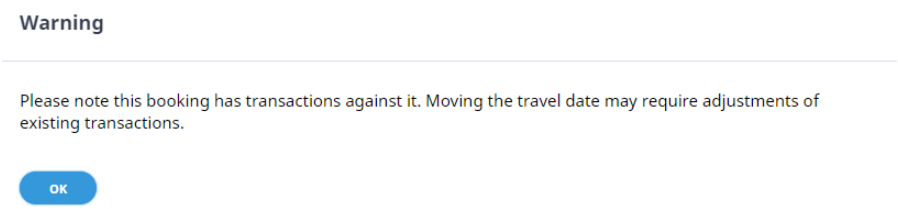
Checked

If the Travel Date needs to be changed but all existing Services already booked are to remain the same, then setting the “Retain Current Service Dates” checkbox will ensure that happens. For example, this may be needed where the client is now arriving three days earlier than planned but still wanting to make use of itinerary as is, and having some additional services in those first three days.

In this case, no recalculation of the booking is required.

Warning

If the booking has transactions recorded, a warning message will display alerting consultants of possible transaction adjustment requirements.



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Manage Days

This is the seventh of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" on page 106
3. "Service Notes" on page 111
4. "Product Notes" on page 115
5. "PCM Management Groups" on page 119
6. "Change Travel Date" on page 124
7. "Manage Days" above (this task)
8. "Insert Booking" on page 130

This screen enables days to be 'inserted' into a booking (or removed from a booking), thereby extending or contracting the duration of the booking.

For example, the agent/client may have advised that, due to a change in airline schedules, the departure date is 1 day later than originally planned. The booking is revised to include one additional night in the current accommodation.

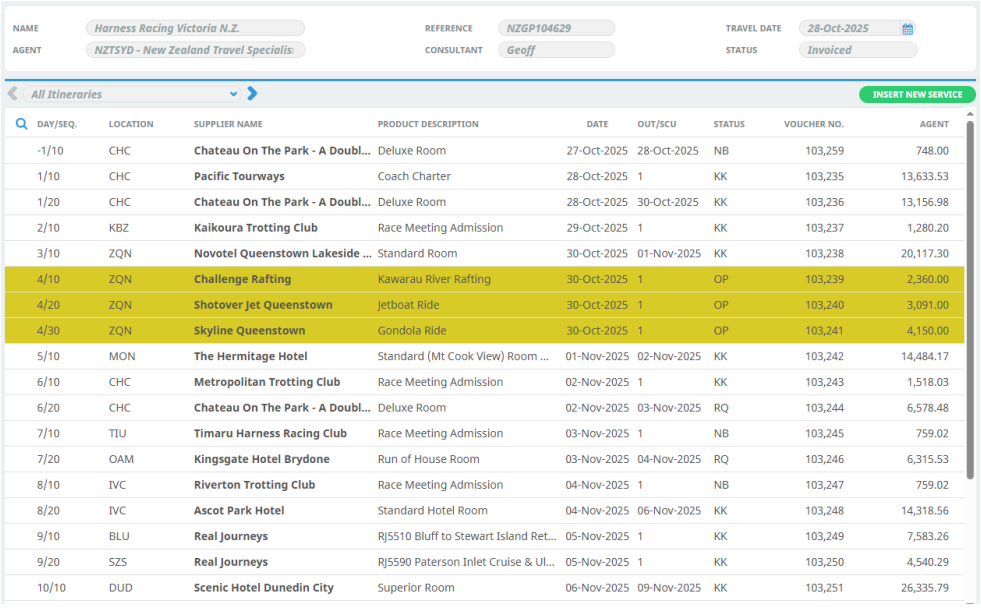
Manage days also allows services to be re-orded/re-sequenced. One example could be: if the agent/client has a last minute request for services to be booked before the first service . The booking can be re-sequenced to accommodate the new services.

Insert/Delete or Resequence Days

1. Search for and retrieve a booking to work with. If you haven't done this already, see Retrieve an Existing Booking.

2. Switch to the **Itinerary View** of the booking.

   a. The default view for a booking is the **Dashboard** view.



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2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
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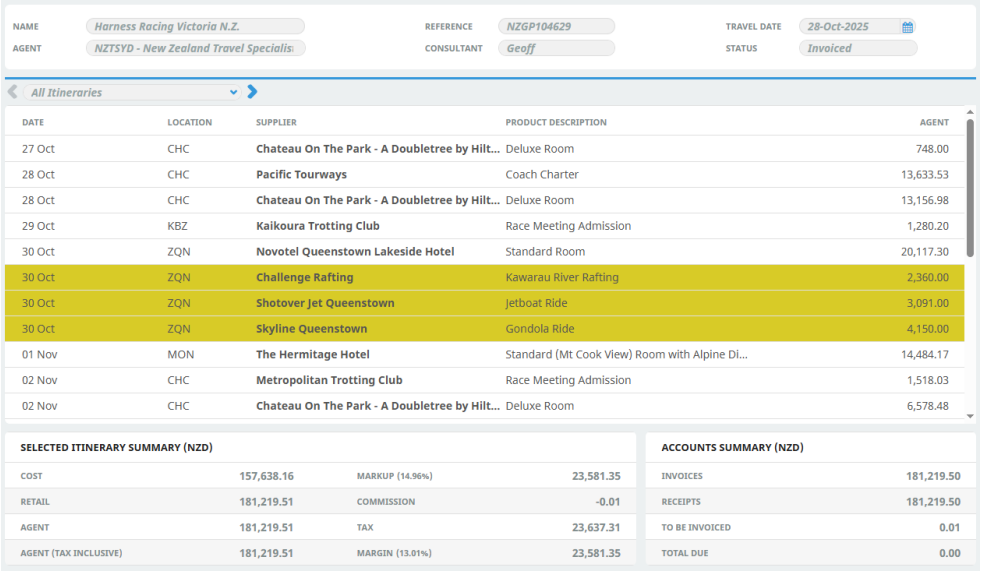
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **Groups menu, Groups > Itinerary.**

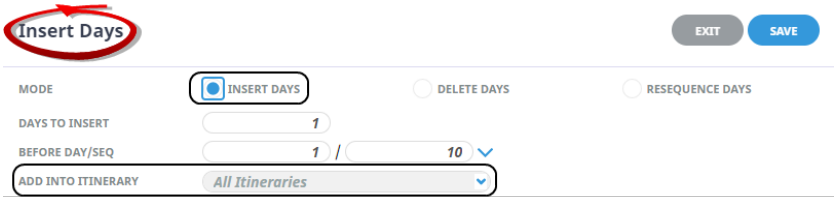
   c. Examine the **Itinerary** on this screen.



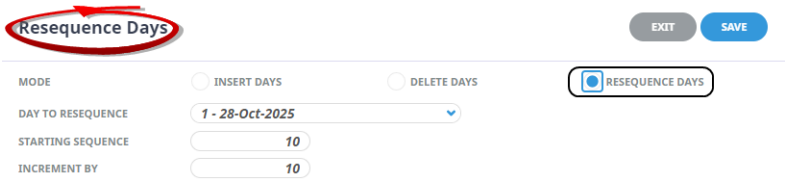
NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries, however, some services may not apply to some itineraries. To see which services apply to which itineraries, click either the drop-down or the left/right arrows in the **All Itineraries** field at the top of the list.

3. Select menu **Groups > Itinerary > Manage Days**.

4. On the **Insert Days** screen, choose a mode (i.e. *Insert Days* or *Delete Days*), enter the number of Days to Insert (or delete) and the new sequencing of those days, and then click **Save**.



   a. Or, select **Resequence Days**, enter a value for the system to start the sequence (of the first service), and to increment (subsequent services) by.



5. If the **Recalculate Booking** screen appears, select the relevant option (i.e. *Replace All*, *Replace All But Overrides* or *No Prices*) and click **Yes**.

> If **Recalculate Booking** does pop-up, then Tourplan has determined that a recalculation is required. Generally, it's not possible to insert or delete days without a recalculation.

About the Insert/Delete or Resequence Days Fields

Mode

Select an option from either:

- Insert Days
- Delete Days
- Resequence Days

If Delete Days is chosen, the labels for the fields beneath it change to *Days to Delete* and *From Day/Seq*.

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If Resequence Days is selected, then labels for the fields beneath it change to *Days to Resequence*, *Starting Sequence*, and *Increment By*.

Insert/Delete Days

Days to Insert/Delete

This field has a default value of 1 (one) when the screen is opened. Replace with the number of days to be inserted/deleted.

Before/From Day/Seq

Enter which day in the sequence to add before or delete from.

The Recalculate dialogue will display every time a service date/day number changes. This is because Tourplan needs to check whether the new date/day places the service in a different season/date range.

NOTE: The 'Insert Days' Utility will not adjust the number of nights for accommodation or rental vehicle services – these must be manually adjusted in the Costs screen.

Add Into/Drop From Itinerary

If multiple itineraries are used within a booking, a selection to add/drop days can be applied to one or all Itineraries. Use the dropdown itinerary selection list to apply a change to one or all itineraries.

Resequence Days

Day to Resequence

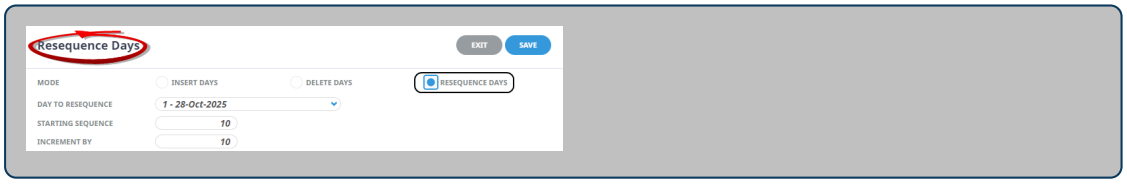
Drop down selection from booking day number and date. Select a day that you want the system to resequence services.

Starting Sequence

For the day selected enter a sequence number for the system to start the sequence from, the system will automatically default to 10.

Increment By

Enter a value for the system to increment the sequence for each service by, the system automatically defaults to 10. Setting a value here will give the service a new sequence number based on the order of services for this day.



Recalculate Booking

When making an amendment to booking dates and Save is clicked, Tourplan will prompt to re-cost the Booking. The choices are:

- *Replace All* – Changes the Booking Header date and all service dates and re-costs all services for the revised travel dates.
- *All Except Overrides* – As above however does not re-cost services where the original database 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 Currency Rates table for the new travel date (checked).

Insert Booking

This is the last of eight tasks described in this user manual for modifying a booking itinerary.

NOTE: There is no particular order in which tasks need to be completed - the numbering is simply for reference.

The full list is:

1. "Pickup / Dropoff" on page 101
2. "Voucher Text" on page 106
3. "Service Notes" on page 111
4. "Product Notes" on page 115
5. "PCM Management Groups" on page 119
6. "Change Travel Date" on page 124
7. "Manage Days" on page 127
8. "Insert Booking" above (this task)

Insert Booking enables another booking to be inserted inside the current booking. This can be used in a number of ways:

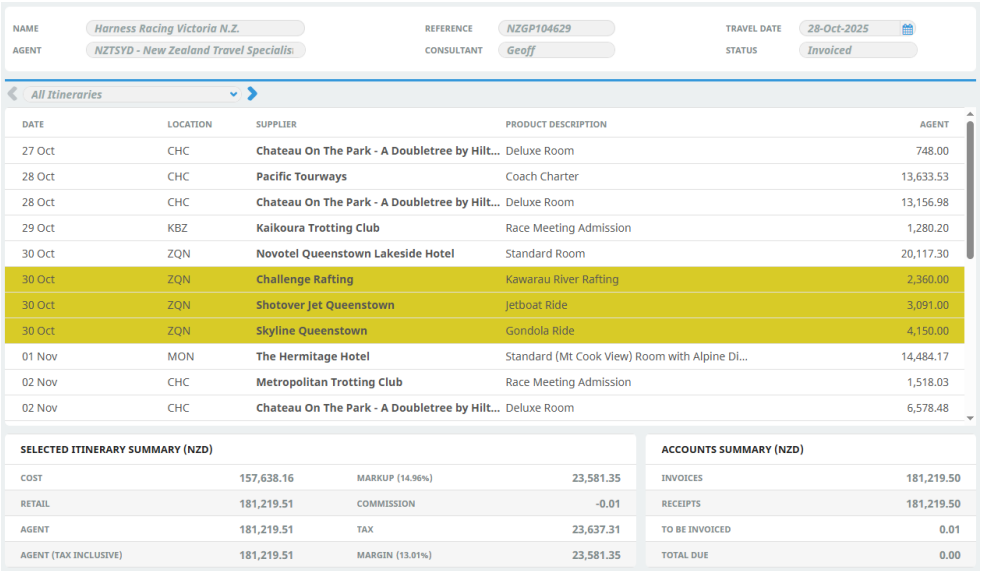
- It can be used as an alternative method of copying a booking, and
- It can be used to add all services from another booking into the current booking.

Insert a Booking

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. Switch to the **Itinerary View** of the booking via menu *Groups* > *Itinerary*.

   a. The default view for a Booking is the **Dashboard view**.



   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the Groups menu, **Groups > Itinerary**.

   c. Examine the **Itinerary** on this screen.

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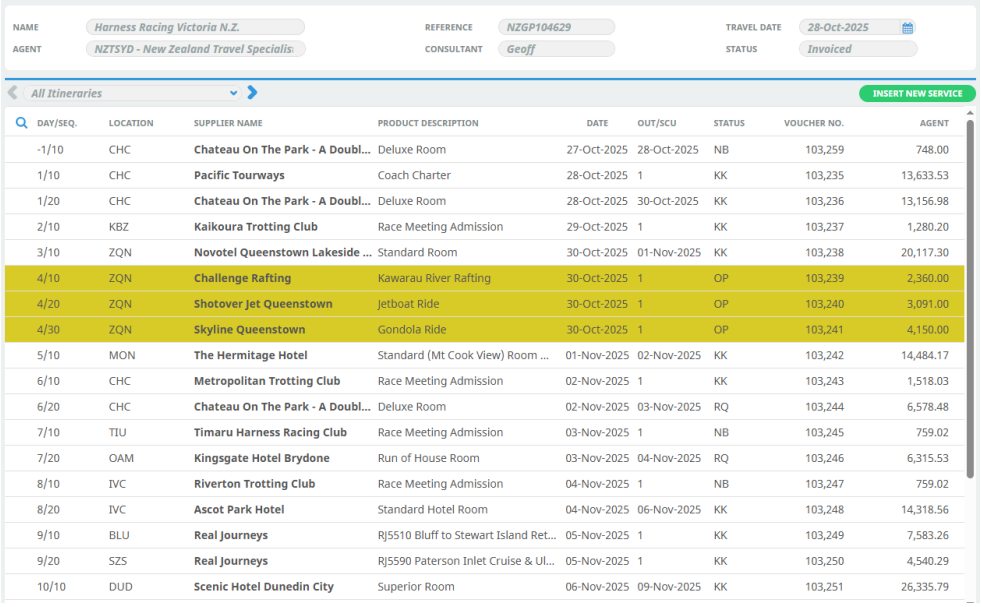
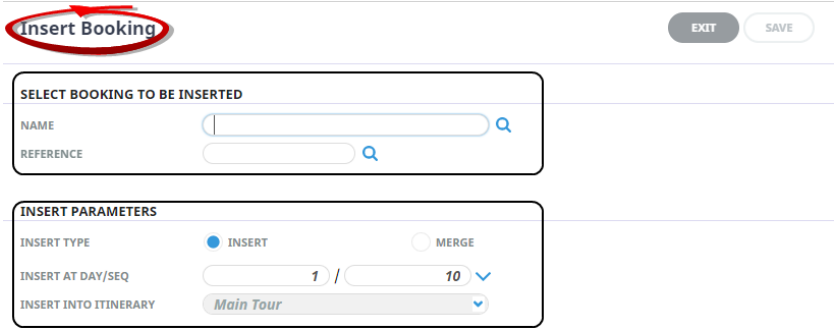


DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	AGENT
-1/10	CHC	Chateau On The Park - A Doubl...	Deluxe Room	27-Oct-2025	28-Oct-2025	NB	103,259	748.00
1/10	CHC	Pacific Tourways	Coach Charter	28-Oct-2025	1	KK	103,235	13,633.53
1/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	28-Oct-2025	30-Oct-2025	KK	103,236	13,156.98
2/10	KBZ	Kaikoura Trotting Club	Race Meeting Admission	29-Oct-2025	1	KK	103,237	1,280.20
3/10	ZQN	Novotel Queenstown Lakeside ...	Standard Room	30-Oct-2025	01-Nov-2025	KK	103,238	20,117.30
4/10	ZQN	Challenge Rafting	Kawarau River Rafting	30-Oct-2025	1	OP	103,239	2,360.00
4/20	ZQN	Shotover Jet Queenstown	Jetboat Ride	30-Oct-2025	1	OP	103,240	3,091.00
4/30	ZQN	Skyline Queenstown	Gondola Ride	30-Oct-2025	1	OP	103,241	4,150.00
5/10	MON	The Hermitage Hotel	Standard (Mt Cook View) Room ...	01-Nov-2025	02-Nov-2025	KK	103,242	14,484.17
6/10	CHC	Metropolitan Trotting Club	Race Meeting Admission	02-Nov-2025	1	KK	103,243	1,518.03
6/20	CHC	Chateau On The Park - A Doubl...	Deluxe Room	02-Nov-2025	03-Nov-2025	RQ	103,244	6,578.48
7/10	TIU	Timaru Harness Racing Club	Race Meeting Admission	03-Nov-2025	1	NB	103,245	759.02
7/20	OAM	Kingsgate Hotel Brydone	Run of House Room	03-Nov-2025	04-Nov-2025	RQ	103,246	6,315.53
8/10	IVC	Riverton Trotting Club	Race Meeting Admission	04-Nov-2025	1	NB	103,247	759.02
8/20	IVC	Ascot Park Hotel	Standard Hotel Room	04-Nov-2025	06-Nov-2025	KK	103,248	14,318.56
9/10	BLU	Real Journeys	RJ5510 Bluff to Stewart Island Ret...	05-Nov-2025	1	KK	103,249	7,583.26
9/20	SZS	Real Journeys	RJ5590 Paterson Inlet Cruise & Ul...	05-Nov-2025	1	KK	103,250	4,540.29
10/10	DUD	Scenic Hotel Dunedin City	Superior Room	06-Nov-2025	09-Nov-2025	KK	103,251	26,335.79

NOTE: The service lines shown in the example Itinerary above cover all services for all itineraries. To see which services apply to which itineraries, select an itinerary from the drop-down menu at the top left of the list (currently showing **All Itineraries**).

3. Select menu **Groups > Itinerary > Insert Booking**.

4. On the **Insert Booking** screen, enter details for the new booking and click *Save*.



5. If the **Recalculate Booking** screen appears, select the relevant option and click *Yes*.

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

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

About the Insert Booking Fields

Name and Reference

Used for looking-up existing bookings. Enter a few characters of the required booking and click the Search icon to display a list of matching bookings.

Insert Type

The new booking can be inserted into an existing booking or merged with existing booking services.

Selection	Description
INSERT	Re-numbers the existing booking service day and sequence numbers if necessary when inserting the new booking. This means that if a 3-day Booking is inserted at say Day 2, Sequence 10, then Day 2 of the host booking will become Day 5.
MERGE	Does not renumber the existing booking services; instead, the inserted booking services are renumbered to “fit around” the existing booking services.

Insert at Day/Seq

The Day and Sequence Number at which the Booking will be inserted can be specified (or, if the Booking is to be inserted into a list of existing services, highlight a service in the list of existing services and the day/sequence number in these two fields will change to the day/sequence of the highlighted line).

NOTE: The insert will take place at the day/sequence specified. This means that if (e.g.) a Booking was to be inserted at 2/10, then the first service from the copied-in Booking would become Day 2/Sequence 10. On an Insert, this would push the service that was 2/10 down the list to be the first service after the newly inserted Booking Services.

Insert into Itinerary

The Itineraries in the booking display here. Clicking the appropriate itinerary will display the services attached to that itinerary. The services being copied from the booking will be attached to the highlighted itinerary.

Recalculation

A recalculate booking screen may open if the system detects that services may need to be re-calculated when inserting the booking. More information on recalculation of bookings is available "Recalculate Booking" on page 95

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CHAPTER 6

Working with Operations and Accounts

Once created, group Bookings need to be viewed, edited, added-to, reported-on and otherwise maintained. Tourplan NX arranges these maintenance operations into three categories; Booking Details, Itinerary, and Operations and Accounts (there is another category at the top of the menu structure, called the *Dashboard*, but this is solely for viewing purposes - all fields in the Dashboard view are read-only). Each category has a number of sub-categories that group related screens and fields together, enabling relevant management tasks to be carried out on the Booking.

This chapter describes the functions and procedures related to maintaining *Operations and Accounts*, including working with invoices.

In this chapter ...

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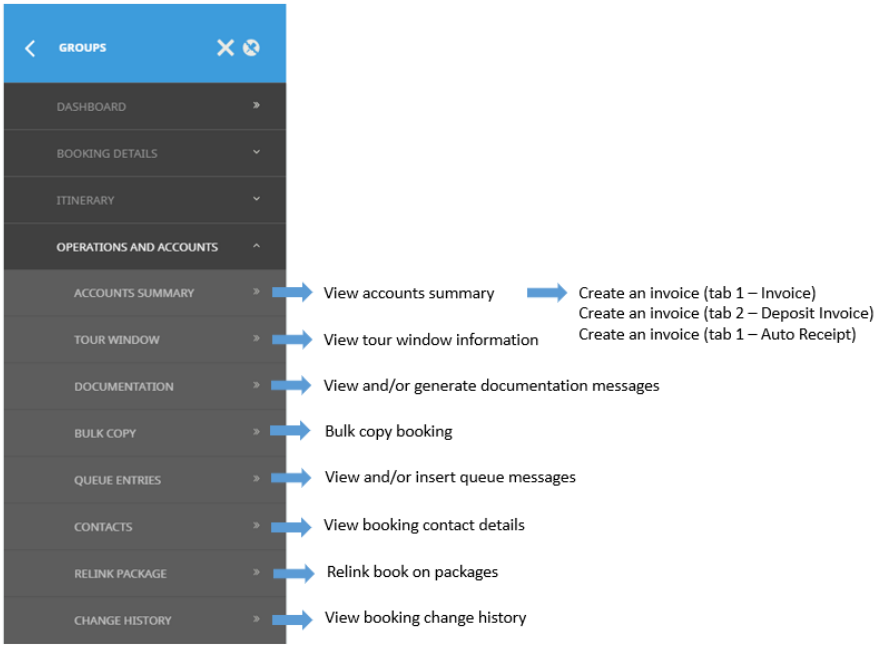
Accounts Summary 135
Creating Invoices 137
Tour Window 146
Documentation 148
Agent Message Generation 149
Supplier Message Generation 154
Bulk Copy 158
Group Queue Entries 160
Contacts 164
Change History 165

TOURPLAN

Operations and Accounts View

The Operations and Accounts view picks up the remaining menu options related to modifying an existing Booking that are not already covered in one of the other Groups menus. As with changing general Booking details or itinerary information, there are several menu options, depending on the type of change needed.

The following graphic shows the Groups **Operations and Accounts** menu matched with corresponding procedures in the Groups User Manual.



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Accounts Summary

The Accounts Summary is used to:

- View payments that have been made against invoices.
- View value of booking vs value of invoices raised vs value of cash received.
- Issue invoice(s) to the agent/client for the booking.
- Apply Credit Notes to invoices that have been issued.

NOTE:

- A Security setting can be enabled that makes it possible to issue cash receipts at the same time invoice transactions are raised. This receipting procedure is discussed under "Create an Invoice and Receipt (Tab 3 - Auto Receipt)" on page 143.
- If the booking status does not allow invoicing, then it will need to be changed to a booking status that does allow invoicing, as discussed in "General Setup - Group Bookings" on page 61.

Any service that has an Optional Service Status (where the setting for **Include in Booking Total** is not set), will not be included in the generation of an invoice.

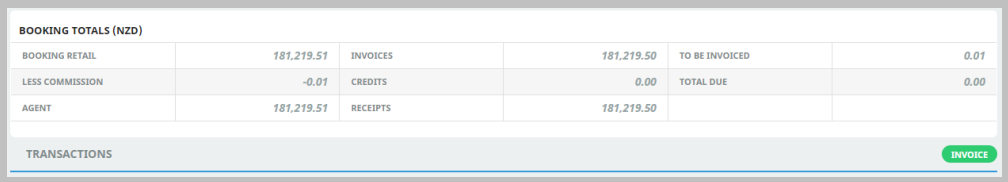
View Accounts Summary

1. Search for and retrieve a booking to work with. If this hasn't been done already, see "Retrieve an Existing Group Booking" on page 47.

2. Select menu **Groups > Operations and Accounts > Accounts Summary**.

3. View the **Accounts Summary** screen.

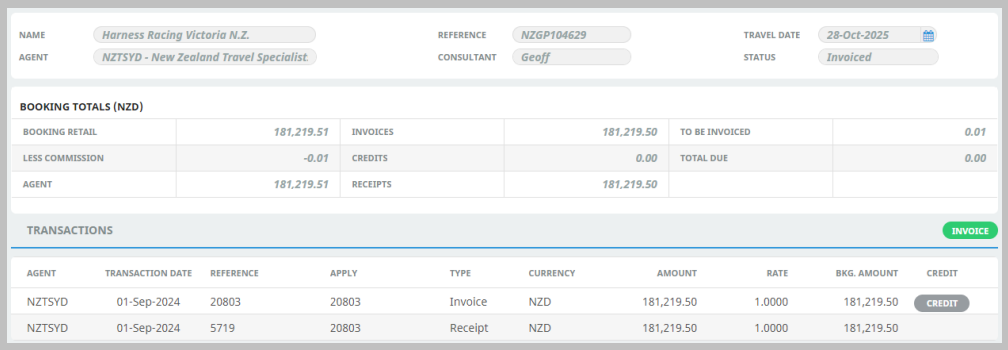
Accounts Summary - Example 1 - Booking Totals



BOOKING TOTALS (NZD)					
BOOKING RETAIL	181,219.51	INVOICES	181,219.50	TO BE INVOICED	0.01
LESS COMMISSION	-0.01	CREDITS	0.00	TOTAL DUE	0.00
AGENT	181,219.51	RECEIPTS	181,219.50		

TRANSACTIONS INVOICE

Accounts Summary - Example 2 - Transaction Summary



NAME	Harness Racing Victoria N.Z.	REFERENCE	NZGP104629	TRAVEL DATE	28-Oct-2025
AGENT	NZTSYD - New Zealand Travel Specialist.	CONSULTANT	Geoff	STATUS	Invoiced

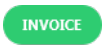
BOOKING TOTALS (NZD)					
BOOKING RETAIL	181,219.51	INVOICES	181,219.50	TO BE INVOICED	0.01
LESS COMMISSION	-0.01	CREDITS	0.00	TOTAL DUE	0.00
AGENT	181,219.51	RECEIPTS	181,219.50		

TRANSACTIONS INVOICE

AGENT	TRANSACTION DATE	REFERENCE	APPLY	TYPE	CURRENCY	AMOUNT	RATE	BKG. AMOUNT	CREDIT
NZTSYD	01-Sep-2024	20803	20803	Invoice	NZD	181,219.50	1.0000	181,219.50	CREDIT
NZTSYD	01-Sep-2024	5719	20803	Receipt	NZD	181,219.50	1.0000	181,219.50	

From the Accounts Summary, you can create a new invoice, select an existing invoice and (a) apply a credit note to all or part of it or (b), edit the invoice (provided it is not in a closed accounting period).

4. To create an invoice, click **Invoice**.



5. To edit an existing transaction, click it to open it.

Transactions can only be edited if they are in an open accounting period.

Dependent on system settings, a warning may display advising that the agent's credit limit has been exceeded. Again, dependent on settings, completion of the invoice could be denied. These settings are user company specific.

6. Continue with "Creating Invoices" on the facing page for detailed steps on creating and viewing invoices.

About the Accounts Summary Fields

Booking Header

NOTE: This section is not shown in the examples.

The Booking Header is the information *above* the Booking Totals section that includes Name, Agent, Reference, Consultant, Travel Date and Status.

Booking Totals

Booking Retail

The retail (cost plus markups, including any agent commission amount) of all itineraries and services in the booking - excluding any "Optional" type services.

Less Commission

The amount of agent commission (if any) which will be deducted from the Booking Retail amount.

Agent

The total amount the booking agent will be invoiced. This figure is Booking Retail less Commission

Invoices

The value of all Invoices issued so far for the booking.

Credits

The value of all Credit Notes issued so far for the booking.

Receipts

The value of Cash Receipts issued so far for the booking.

To Be Invoiced

This figure is any outstanding balance of the booking that needs to be invoiced. The figure is a calculation of the Booking Agent amount less any Invoices/Credits etc that may have been issued.

Total Due

The sum of Invoices, less Credits, less Receipts.

Transactions

Transactions entered against the booking, which can include invoices and receipts, as shown in the examples.

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Creating Invoices

Invoices are generated in the system on a service line-by-service line basis. This has two main benefits:

1. It enables accurate statistical reporting to be obtained showing which agents are selling which product and what margins by agent are being obtained; and
2. It identifies which services have been invoiced. This can be useful when an agent has to be invoiced for a specific service where (e.g.) a deposit has to be paid to the supplier.

NOTE: Because the invoice details are generated internally on a line-by-line basis does not mean that is how they will physically print. Print format is determined by the invoice message template set up.

When the Invoice Details tab is selected, an invoice can be raised for:

- The total outstanding value of the booking. If previous invoices have been raised, the new invoice will be for the total booking value with an additional "Less Previously Invoiced" line subtracting the value already invoiced.
- A Deposit Invoice, based on a percentage or amount and for specific service(s) if required.
- If Auto Receipting has been enabled, a Receipt can be automatically created after the invoice has been generated.

The Transaction Header on the Invoice Tab must be completed for each of the invoice types.

There are three invoicing procedures described in summary in this topic:

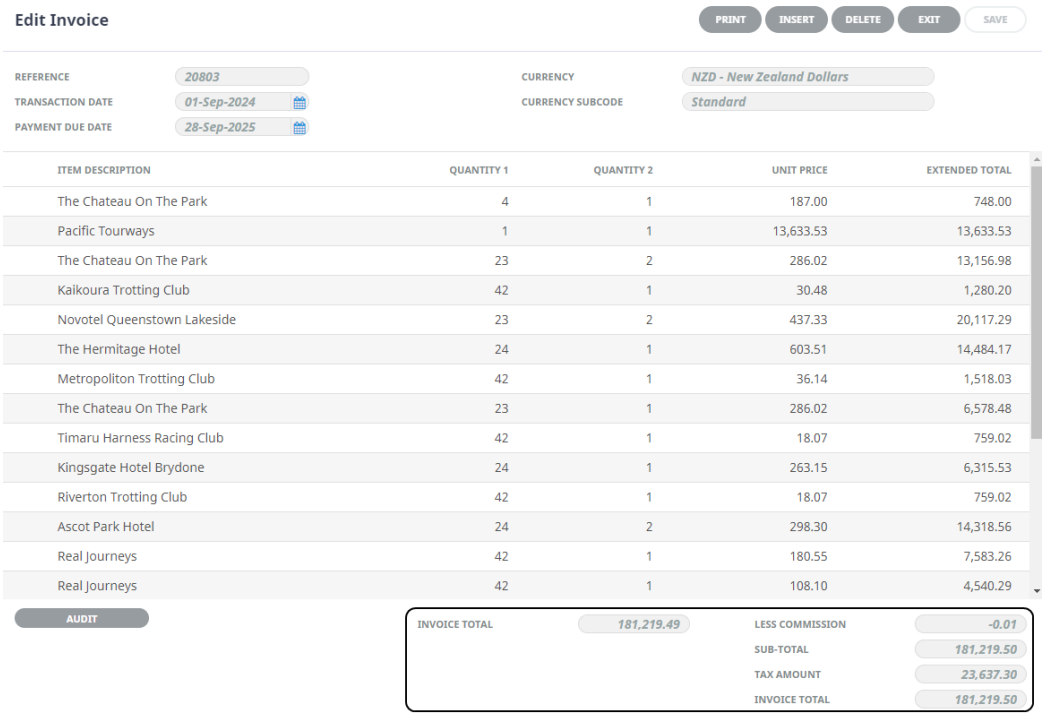
1. "Create an Invoice (Tab 1 - Invoice)" below
2. "Create an Invoice (Tab 2 - Deposit Invoice)" on page 142
3. "Create an Invoice and Receipt (Tab 3 - Auto Receipt)" on page 143

Create an Invoice (Tab 1 - Invoice)

1. Search for and retrieve a booking to work with. If this hasn't been done already, see "Retrieve an Existing Group Booking" on page 47.

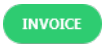
2. Select menu **Groups > Operations and Accounts > Accounts Summary**.

3. If there are any transactions in the list, provided they are in an open accounting period, they can be edited by clicking the **transaction.**

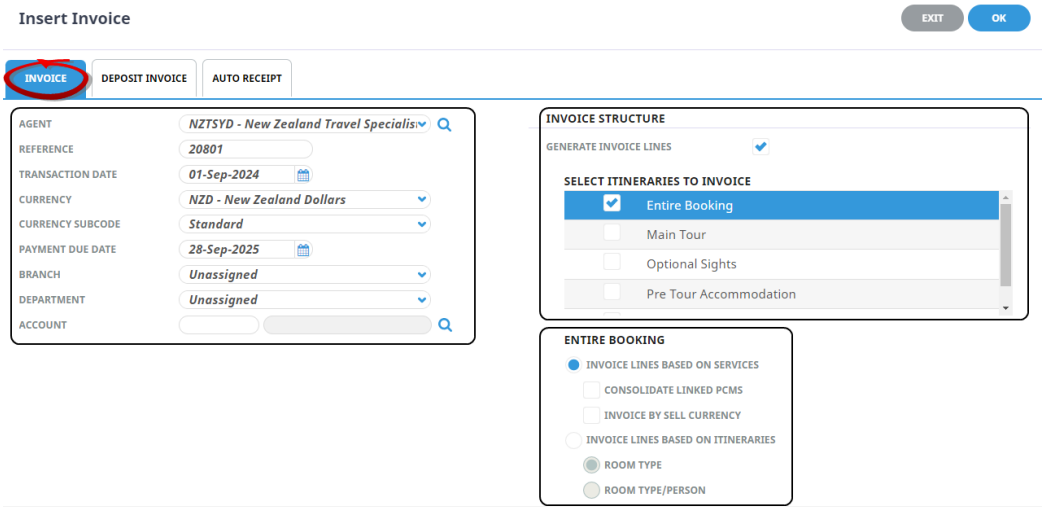


NOTE: To change anything on the Edit Invoice screen, click one of the *Item Description* lines to display the Invoice Line screen, and make your changes there.

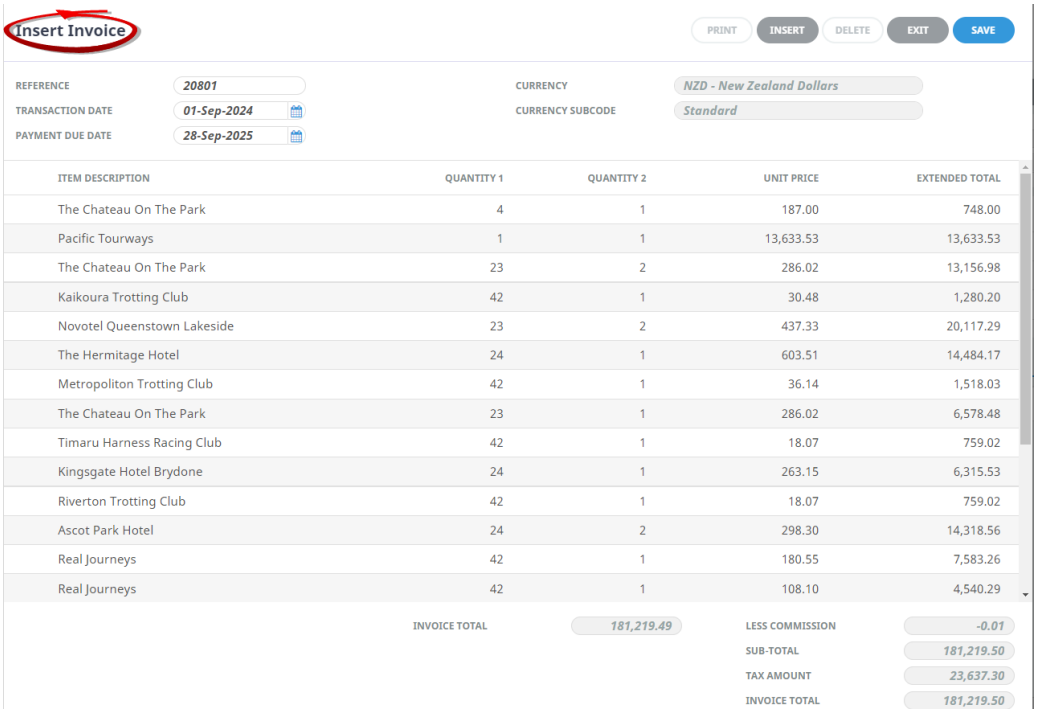
4. To create a new invoice, click **Invoice**.



5. On the Insert Invoice screen (**Invoice tab**), click *OK* to view the invoice detail.



6. On the detailed **Insert Invoice** screen:



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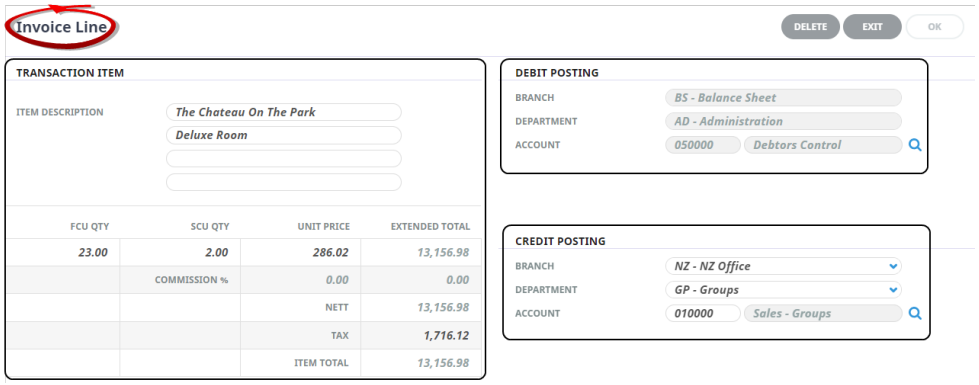
a. If there are no further entries required for this invoice, check that all values are correct and click **Save** to output the invoice transaction.

b. To edit a line, double-click it.

NOTE: It is possible to use the **Insert** button to insert a new invoice line, however this is more likely to be used when a "manual" type of invoice is being issued.

c. On the **Invoice Line** screen, edit fields if necessary and click *OK*.

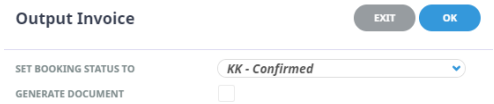


NOTE: Debit and Credit positing are automated and should not be changed.

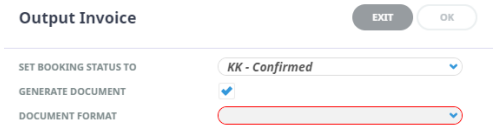
d. Click *Save* to output the invoice transaction.

7. On the **Output Invoice** screen

a. Select an appropriate **booking status** from the drop-down field *Set Booking Status To* and click *OK*.



b. To email or generate a document, select **Generate Document** and an appropriate Document Format from the drop-down field and click *OK*.



8. If the Review & Send Document screen appears, there are several options available - choose one:
   - Click *Exit* to return to Accounts Summary. The invoice now appears in the Transactions list.
   - Click *Download* to save a local copy of the invoice document as a PDF file.
   - Email the invoice document by selecting the *Sent Details* tab, entering email address information and clicking *Email*.

About the Insert Invoice Fields

Insert Invoice Screen (Tab 1 - Invoice)

When *OK* is clicked on the Invoice tab, Tourplan raises an invoice for either the total value of the booking or, if previous invoices have been raised, the difference between the amount already invoiced and the booking value.

Agent

Accept the Agent defaulted from the Booking Header. If necessary, an invoice can be issued to a different agent by selecting the agent from the drop-down list.

NOTE: It is possible to issue multiple invoices for a booking to different agents/clients by changing the agent code in this field.

Reference

This invoice number is automatically generated by Tourplan. A system setting will normally dictate that the invoice number cannot be changed.

Transaction Date

This is the Transaction Date and determines the Transaction Period. The default date here will depend on an accounting INI setting. The default transaction date could be either today's date, the booking travel date, the date of the last service in the booking or a date based on the current accounting period. The default date can be overridden if a different date is required on the invoice. The transaction date cannot be in a closed accounting period.

Currency

The invoice currency defaulted from the booking Header. This may be changed for the invoice if required. Only currencies that are attached to the agent are available. (Also see 'Invoice By Sell Currency' in the table below.)

Currency Subcode

This will default to the currency sub code from the booking header. (See discussion under Agent Currencies, Booking Currencies, Service Currencies & Invoice Currency.)

Payment Due Date

Defaulted from the standard payment terms set up for this Agent. This may be overridden. In this example the payment due terms are 60 days prior to travel.

Branch, Department & Account

Unless instructed otherwise, these should be left blank as these values are automatically set based on the booking reference branch & department values.

Invoice Structure

Generate Invoice Lines

Create individual lines for each invoice inserted (the default option).

Select Itineraries to Invoice

Choose the itinerary for which invoices are to be displayed. If choosing *Entire Booking*, that is the only option able to be selected. Otherwise, one or more (sub)itineraries can be selected.

If you choose multiple itineraries to invoice, the <Itinerary Name> heading will be the **last** one chosen.

<Itinerary Name> (e.g. Entire Booking)

Selection	Description
Invoice Lines Based on Services	The default - outputs the invoices based on service day and sequence.
Consolidate Linked PCMs	If the Booking has Linked PCM(s) in it, this check-box becomes active. Checking this box shows the total value of a linked PCM as one invoice line as opposed to a line for each service in the PCM.

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Selection	Description
Invoice by Sell Currency	In addition to being able to invoice in any currency that is attached to the agent, ticking this check-box invoices only those services whose sell currency matches the currency selected from the currency drop-down above. If (e.g.) there are services in the booking whose sell currency is USD and the booking currency is NZD, then selecting USD from the currency drop-down and ticking this check-box invoices only those services with USD as the sell currency. This option is only available if Invoice Lines Based on Services is checked, and if Entire Booking is selected from the Itineraries Section.
Invoice Lines Based on Itineraries	Outputs invoices based on itineraries.
Room Type	Using this selection outputs the invoice lines as 'Itinerary Name' then the number and price of Twin, Double, Single rooms etc. as a per room price.
Room Type/Person	Using this selection outputs the invoice lines as 'Itinerary Name' then the number and price of Twin, Double, Single rooms as a per person price for the room type.

Insert Invoice Screen (Tab 2 - Deposit Invoice)

When the Deposit Invoice tab is selected, a deposit invoice can be generated using either a percentage amount or a value amount. In both cases, the amounts will be pro-rated across the services that are tagged in the Deposit Invoice screen. Those services that have a status that *excludes* the costs from the total (e.g., Optional services) will not be included in the invoice calculation.

Insert Invoice Screen (Tab 3 - Auto Receipt)

Some user companies have a need to receipt an invoice as soon as it is issued – an example being when payment by credit card is being processed when the invoice is raised.

NOTE: Standard receipting cannot be done here - that has to be done in the Debtors application.

Receipt Invoice In Full

When this radio button is selected, the full amount of the invoice about to be generated will be receipted

Receipt Specific Amount

Selecting this radio button will allow a specific amount to be entered into the Receipted Amount field. This amount will be prorated across all invoice lines.

Receipt Type

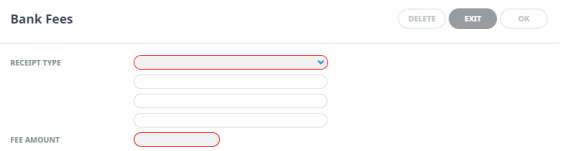
Select the required Receipt Type from the dropdown. The receipt type determines which system bank account the receipt will be credited to.

Receipt Text 1 - 3

There are three user defined text fields against each Receipt Type. These can have labels set up for them when the receipt type is defined. The labels will display here once a receipt type is selected. Common use of receipt type text are labels for "Bank", "Branch" and "Account" or "Card Type", "Card Number", "Card Expiry".

Add Fee Button

If there is a bank charge associated with the receipt - e.g., foreign exchange transaction fee - clicking this button will allow selection of an additional Receipt Type to allow the fee to be posted to the correct expense account.

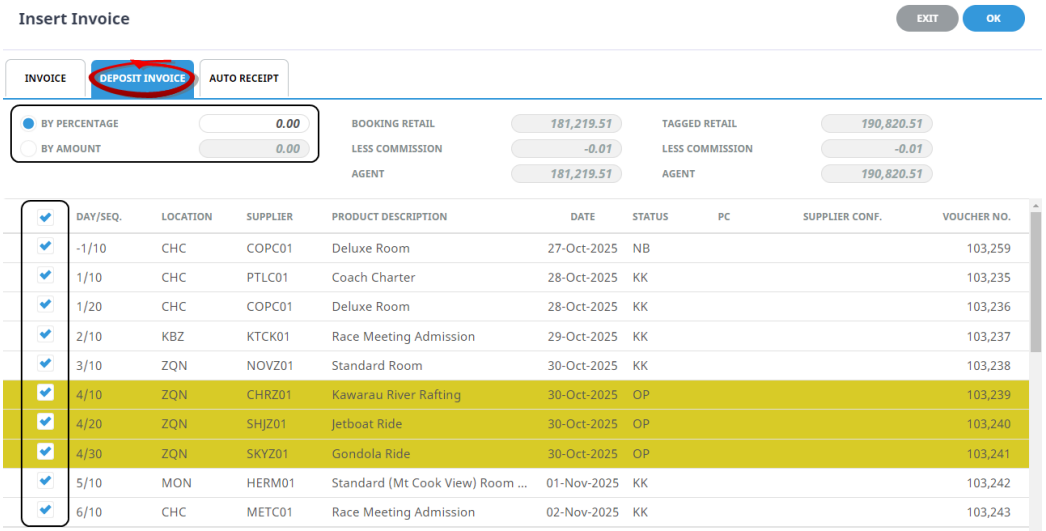


Create an Invoice (Tab 2 - Deposit Invoice)

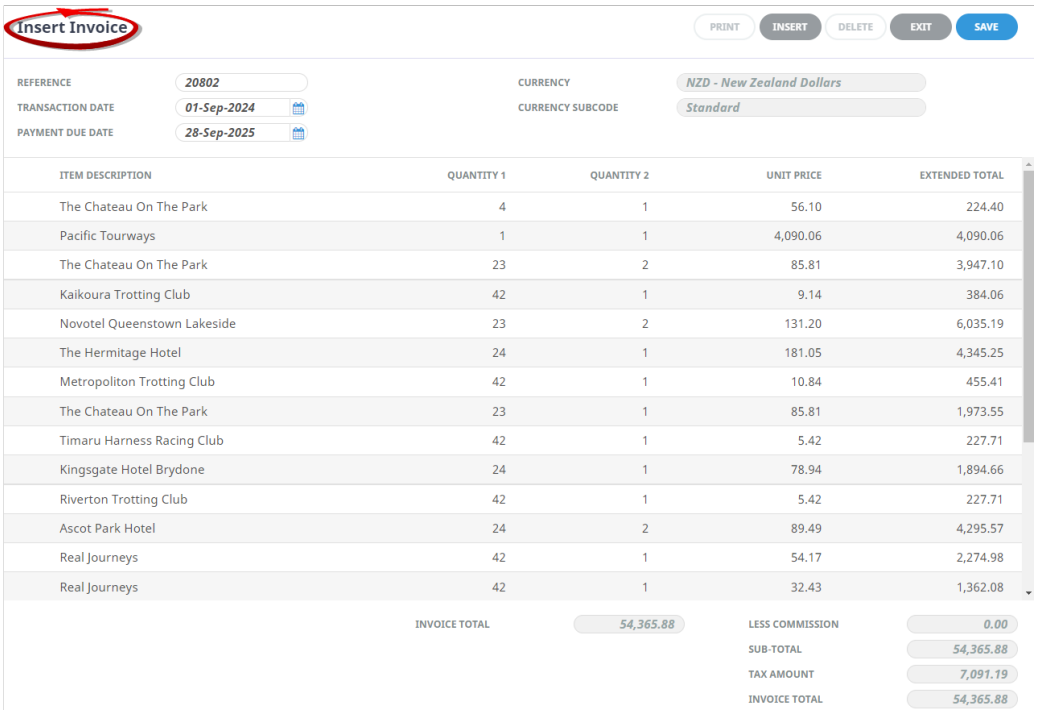
1. Search for and retrieve a booking to work with. If this hasn't been done already, see "Retrieve an Existing Group Booking" on page 47.

2. Select menu **Groups > Operations and Accounts > Accounts Summary**.

3. On the Insert Invoice screen, complete the transaction header details, then click the **Deposit Invoice** tab to view the invoice detail. Select how the Deposit Invoice is to be generated (**by percentage** or **by amount**), and enter the value. Tag the services the invoice is to apply the deposit amount for and click *Ok*.



4. On the detailed **Insert Invoice** screen:



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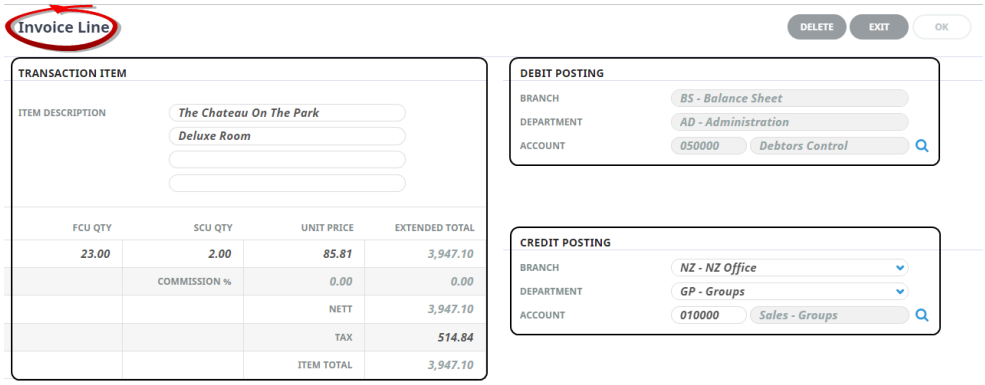
a. If there are no further entries required for this invoice, check that all values are correct and click **Save** to output the invoice transaction.

b. To edit a line, double-click it.

NOTE: It is possible to use the **Insert** button to insert a new invoice line, however this is more likely to be used when a "manual" type of invoice is being issued.

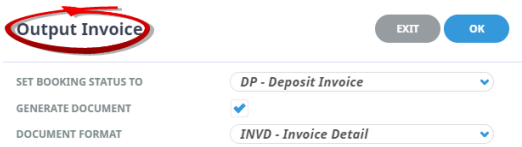
c. On the **Invoice Line** screen, edit fields if necessary and click *OK*.



NOTE: The Credit Posting section will have the General Ledger account in it that the credit side of the transaction will be posted to. This will be the default Revenue Account as set up in the General Ledger INI settings. This account detail should not be altered - if the incorrect account is chosen, cross ledger postings could result which will cause difficulty in reconciling.

d. Click *Save* to output the invoice transaction.

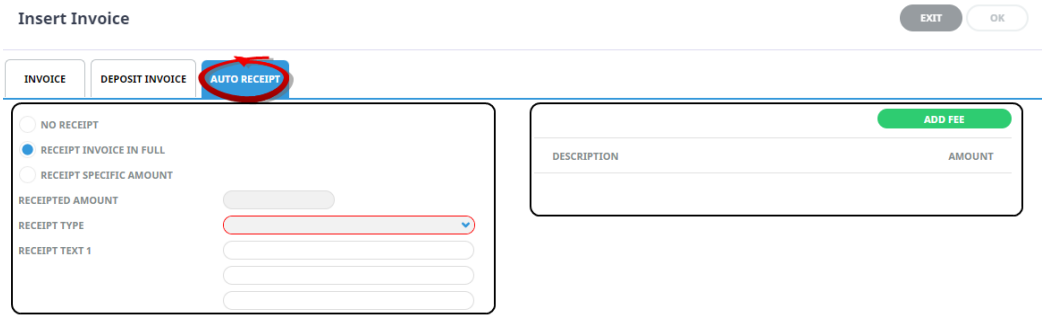
5. On the **Output Invoice** screen, select an appropriate booking status from the drop-down field *Set Booking Status To*, choose whether or not to generate a document (including specifying the document format) and click **OK**.



6. If the Review & Send Document screen appears, there are several options available - choose one:
   - Click *Exit* to return to Accounts Summary. The invoice now appears in the Transactions list.
   - Click *Download* to save a local copy of the invoice document as a PDF file.
   - Email the invoice document by selecting the *Sent Details* tab, entering email address information and clicking *Email*.

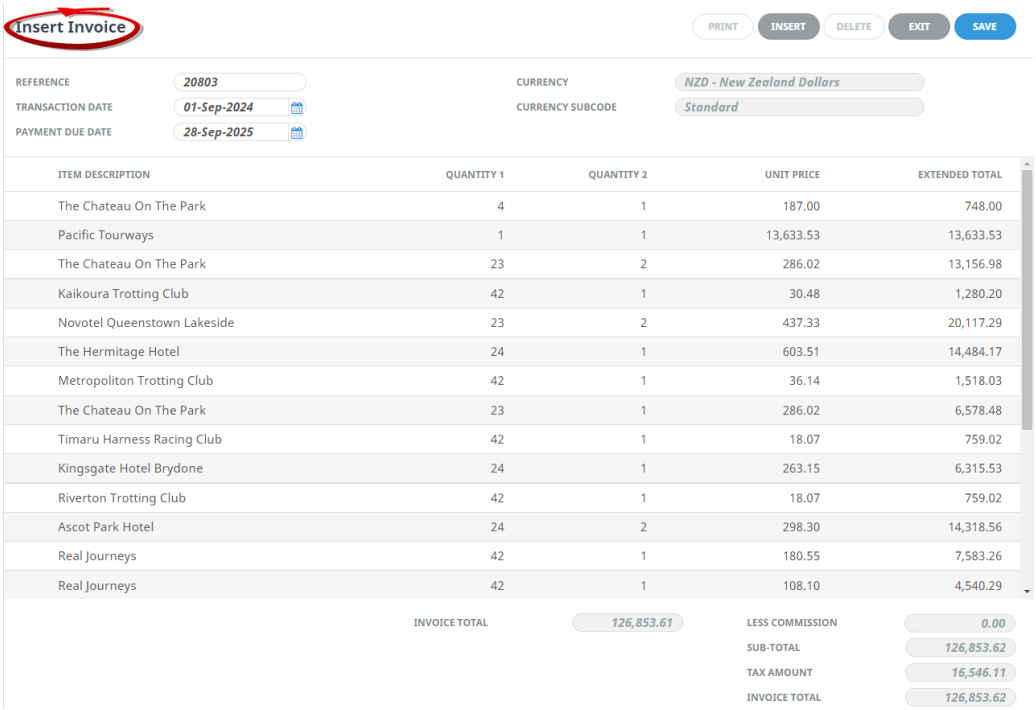
Create an Invoice and Receipt (Tab 3 - Auto Receipt)

1. Search for and retrieve a booking to work with. If this hasn't been done already, see Retrieve an Existing Booking.
2. Switch to the Accounts Summary view of the booking (see Accounts Summary).
3. On the Insert Invoice screen, complete the transaction header details, and then click the **Auto Receipt** tab.



NOTE: If an Auto Receipt invoice is being generated, the invoice creation does not begin until the receipt header details have been completed and the *OK* button clicked.

4. On the detailed **Insert Invoice** screen:



a. If there are no further entries required for this invoice, check that all values are correct and click **Save** to output the invoice transaction.

b. To edit a line, double-click it.

NOTE: It is possible to use the **Insert** button to insert a new invoice line, however this is more likely to be used when a "manual" type of invoice is being issued.

c. On the **Invoice Line** screen, edit fields if necessary and click *OK*.

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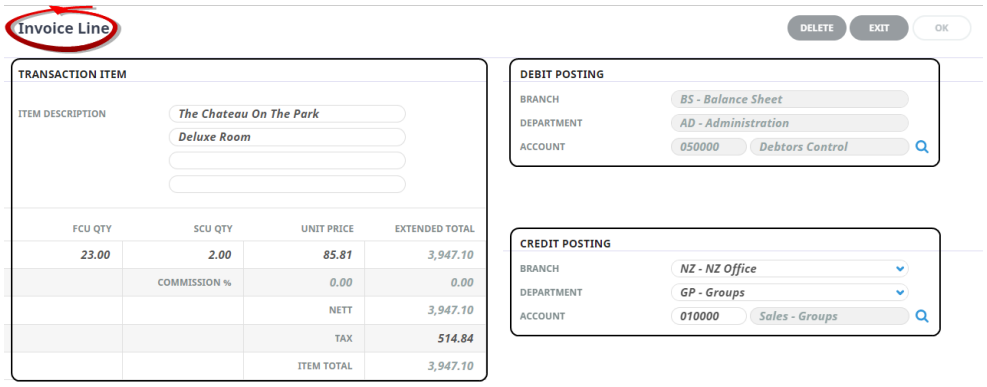


NOTE: The Credit Posting section will have the General Ledger account in it that the credit side of the transaction will be posted to. This will be the default Revenue Account as set up in the General Ledger INI settings. This account detail should not be altered - if the incorrect account is chosen, cross ledger postings could result which will cause difficulty in reconciling.

d. Click **Save** to output the invoice transaction.

5. On the Output Invoice screen, select an appropriate booking status from the drop-down field *Set Booking Status To*, choose whether or not to generate a document (including specifying the document format) and click *OK*.

6. If the Review & Send Document screen appears, there are several options available - choose one:
   - Click *Exit* to return to Accounts Summary. The invoice now appears in the Transactions list.
   - Click *Download* to save a local copy of the invoice document as a PDF file.
   - Email the invoice document by selecting the *Sent Details* tab, entering email address information and clicking *Email*.

Tour Window

This is the second of six tasks described in this user manual for viewing or changing the following:

- Information about accounts, invoices and the tour window
- Operations details, including documentation, messaging and contacts

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "Accounts Summary" on page 135
2. "Tour Window" above (this task)
3. "Documentation" on page 148
4. "Group Queue Entries" on page 160
5. "Contacts" on page 164
6. Change History

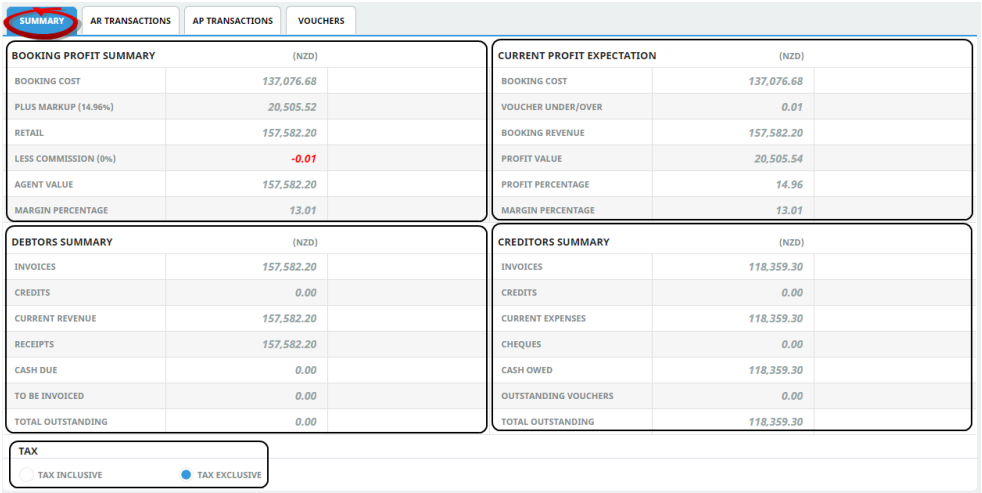
The Tour Window provides a number of views that summarise transactions over the entire booking. There are currently four views available, accessed from menu *Groups > Operations and Accounts > Tour Window*.

Tabs on the screen allow selection of a particular transaction view.

View Tour Window Information

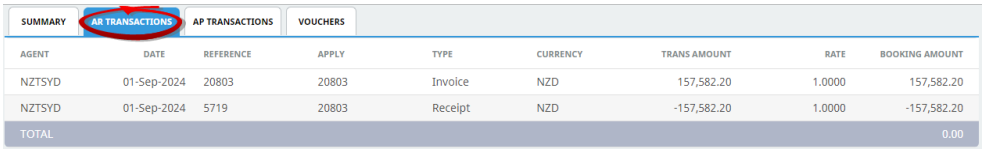
1. Search for and retrieve a booking to work with. If this hasn't been done already, see "Retrieve an Existing Group Booking" on page 47.
2. Select menu **Groups > Operations and Accounts > Tour Window**.
3. The Summary Tab will open, the other tabs available are:

   a. **Summary**



   NOTE: Summary totals can be displayed with or without tax - simply click the relevant Tax radio button (*Tax Inclusive* or *Tax Exclusive*).

   b. **AR Transactions (Accounts Receivable)**



AGENT	DATE	REFERENCE	APPLY	TYPE	CURRENCY	TRANS AMOUNT	RATE	BOOKING AMOUNT
NZTSYD	01-Sep-2024	20803	20803	Invoice	NZD	157,582.20	1.0000	157,582.20
NZTSYD	01-Sep-2024	5719	20803	Receipt	NZD	-157,582.20	1.0000	-157,582.20
TOTAL								0.00

   c. **AP Transactions (Accounts Payable)**

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SUMMARY | AR TRANSACTIONS | AP TRANSACTIONS | VOUCHERS

SUPPLIER	DATE	REFERENCE	APPLY	TYPE	CURRENCY	TRANS AMOUNT	VOUCHER NO.	RATE	BOOKING AMOUNT
SCHD01	16-Nov-2025	225455	225455	Invoice	NZD	19,912.17	103,251	1.0000	19,912.17
METC01	20-Nov-2025	3327	3327	Invoice	NZD	1,147.83	103,243	1.0000	1,147.83
COPC01	01-Nov-2025	34976095	34976095	Invoice	NZD	9,947.83	103,236	1.0000	9,947.83
COPC01	01-Nov-2025	34976095	34976095	Invoice	NZD	29,920.00	103,253	1.0000	29,920.00
KTCK01	29-Oct-2025	544	544	Invoice	NZD	968.00	103,237	1.0000	968.00
APHI01	26-Nov-2025	769599-88	769599-88	Invoice	NZD	10,826.09	103,248	1.0000	10,826.09
PTLC01	01-Oct-2025	7856291	7856291	Invoice	NZD	10,308.70	103,235	1.0000	10,308.70
REJS01	26-Nov-2025	8955955	8955955	Invoice	NZD	5,733.91	103,249	1.0000	5,733.91
REJS01	26-Nov-2025	8955955	8955955	Invoice	NZD	3,433.04	103,250	1.0000	3,433.04
NOVZ01	01-Nov-2025	989733	989733	Invoice	NZD	15,210.43	103,238	1.0000	15,210.43
HERM01	01-Nov-2025	HW87589	HW87589	Invoice	NZD	10,951.30	103,242	1.0000	10,951.30
TOTAL									118,359.30

d. **Vouchers**

SUMMARY | AR TRANSACTIONS | AP TRANSACTIONS | VOUCHERS

CURRENCY

BASE (NZD) BOOKING (NZD) SERVICE

VOUCHER	DATE	SUPPLIER	CURRENCY	RATE	EXPECTED COST	VOUCHERED COST	ACTUAL COST	OUTSTANDING	VOUCHER STATUS	UNDER/OVER
103,259	27-Oct-2025	COPC01	NZD	1.0000	650.43	0.00	0.00	0.00	Not Printed	0.00
103,235	28-Oct-2025	PTLC01	NZD	1.0000	10,308.70	10,308.70	10,308.70	0.00	Closed	0.00
103,236	28-Oct-2025	COPC01	NZD	1.0000	9,947.83	9,947.83	9,947.83	0.00	Closed	0.00
103,237	29-Oct-2025	KTCK01	NZD	1.0000	968.00	968.00	968.00	0.00	Closed	0.00
103,238	30-Oct-2025	NOVZ01	NZD	1.0000	15,210.44	15,210.44	15,210.43	0.00	Closed	0.01
103,239	30-Oct-2025	CHRZ01	NZD	1.0000	1,762.17	0.00	0.00	0.00	Not Printed	0.00
103,240	30-Oct-2025	SHJZ01	NZD	1.0000	986.09	0.00	0.00	0.00	Not Printed	0.00
103,241	30-Oct-2025	SKYZ01	NZD	1.0000	337.83	0.00	0.00	0.00	Not Printed	0.00
103,242	01-Nov-2025	HERM01	NZD	1.0000	10,951.30	10,951.30	10,951.30	0.00	Closed	0.00
103,243	02-Nov-2025	METC01	NZD	1.0000	1,147.83	1,147.83	1,147.83	0.00	Closed	0.00
103,244	02-Nov-2025	COPC01	NZD	1.0000	4,973.92	0.00	0.00	0.00	Not Printed	0.00
103,245	03-Nov-2025	THRT01	NZD	1.0000	573.91	0.00	0.00	0.00	Not Printed	0.00
103,246	03-Nov-2025	KGHO01	NZD	1.0000	4,775.10	0.00	0.00	0.00	Not Printed	0.00
103,247	04-Nov-2025	RTCR01	NZD	1.0000	573.91	0.00	0.00	0.00	Not Printed	0.00
103,248	04-Nov-2025	APHI01	NZD	1.0000	10,826.09	10,826.09	10,826.09	0.00	Closed	0.00

NOTE: There are three options for choosing a currency in which to list Voucher transactions - simply click the relevant Currency radio button (*Base*, *Booking* or *Service*):

- *Base* currency is the currency that final accounting is done in - normally the currency of the user company's country.
- *Booking* currency is the currency that is in the Booking Header (Booking Details screen).
- *Service* currency is cost currency of the service in the product database. When Service Currency is selected, the Total row does not display. This is because the service currencies may not be consistent, so a total would be irrelevant.

For more information about column headings refer to the Appendices - Tour Window Column Headings

Documentation

This is the third of six tasks described in this user manual for viewing or changing the following:

- Information about accounts, invoices and the tour window
- Operations details, including documentation, messaging and contacts

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "Accounts Summary" on page 135
2. "Tour Window" on page 146
3. "Documentation" above (this task)
4. "Group Queue Entries" on page 160
5. "Contacts" on page 164
6. Change History

The Documentation screen is where you generate, download and send documentation messages.

NOTE: The setting up of message templates and the technical aspects of messaging are not discussed here. This section simply describes generating and outputting messages. The assumption is that message formats have been defined. The Messaging sub-system is covered in the System Setup User Manual.

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Agent Message Generation

Agent messages are documents such as quotations and confirmation letters which can be generated from your booking and in most cases can be sent to your agents via email.

Generate New Agent Document Messages

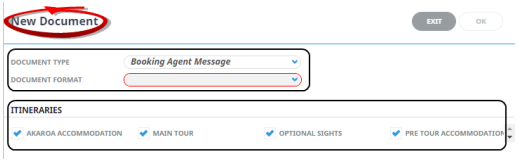
1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47

2. Select menu **Groups > Operations and Accounts > Documentation**.

3. To generate a new message, click **Generate Message**.

   GENERATE MESSAGE

4. In the **New Document** screen select a Document Type and a Document Format. (If there are multiple itineraries, select the required itineraries for this message)



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

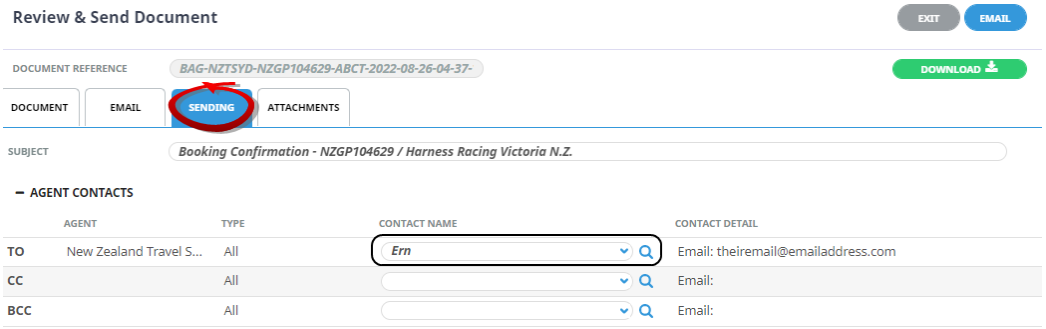
   OK

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

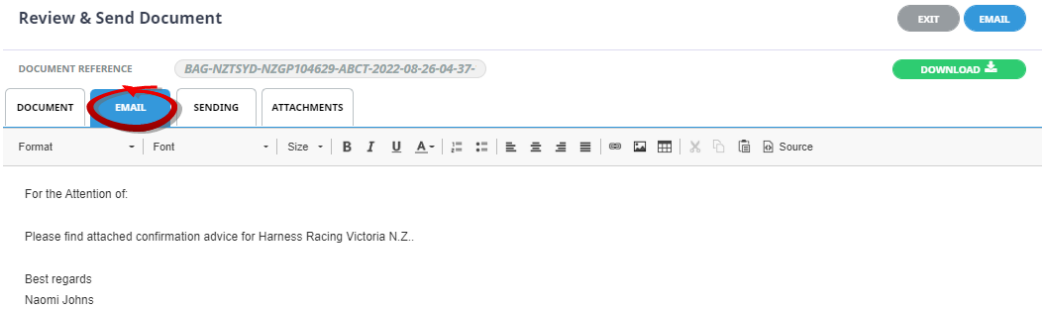
   EXIT

7. 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 **Email and Sending** tabs allow 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.



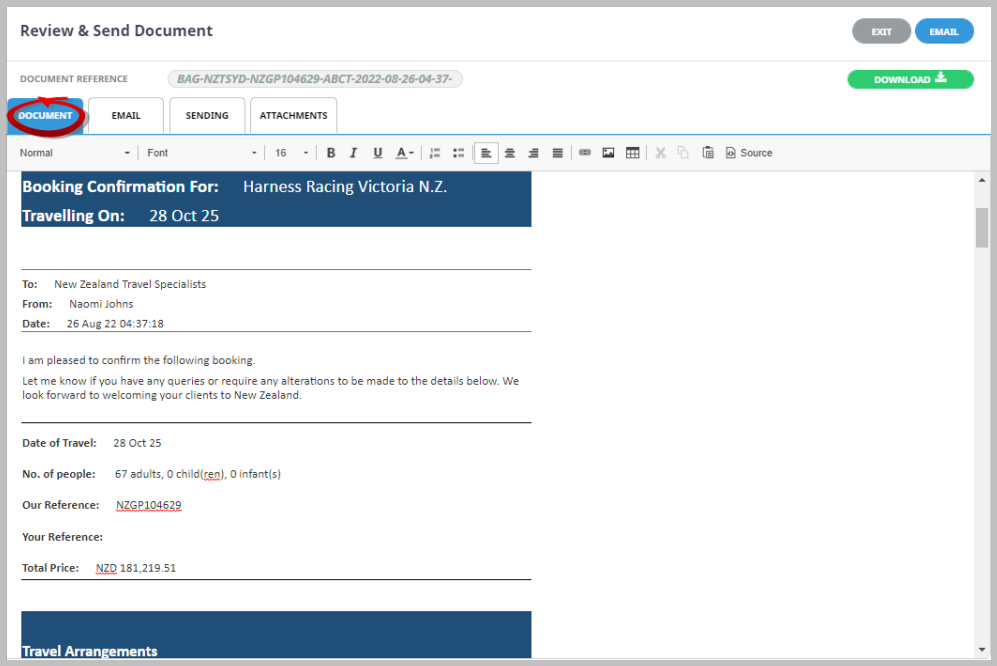
   The email tab displays the body of the email coded within the Message Template. This can be viewed, and edited if required.



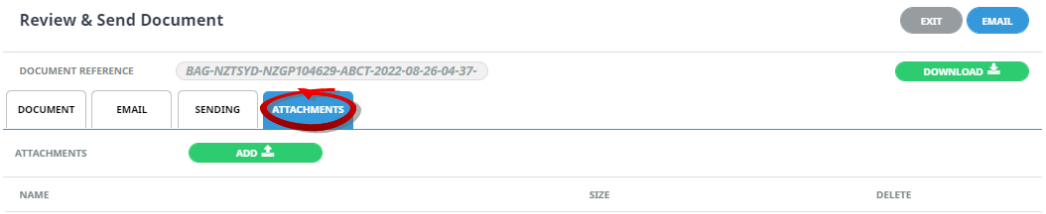
8. On the **Review & Send Document** screen, you can examine the generated document, download it (using the green **Download** button) or email (using the blue **Email** button).

> 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.

This example shows the Review and Send **Document** screen for an Agent Message selection.



9. On the **Attachments** tab, click **Add** to add additional attachments to send with your email. - *Optional Task*. If the Message Template has been configured to send attachments, a list of attachments will show on screen.



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

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

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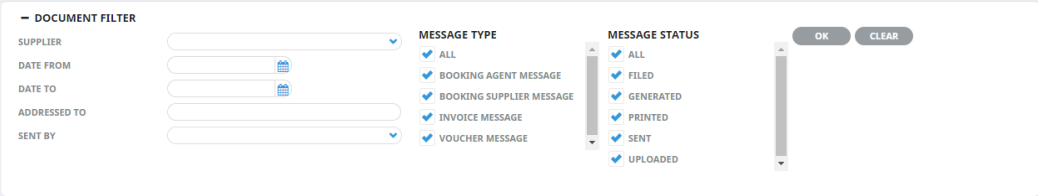
EXIT

View and/or Re-Generate Documentation Messages

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

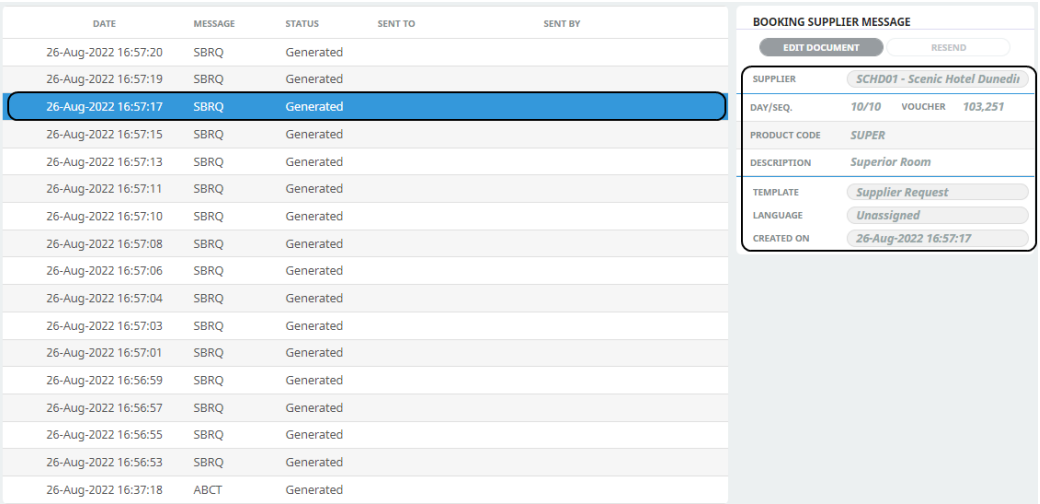
2. Select menu **Groups > Operations and Accounts > Documentation**.

   NOTE: Filters can be used categorise the messages. Select the + next to the Document Filter heading to see the search filters available.



3. Examine the **list of documentation messages**, if any. The top (and most recently worked on) messages highlighted.

   The example messages were generated, however were not sent via an email. If an email was sent from Tourplan, the Sent To, and Sent By data would have recorded who the message was sent to and by whom.



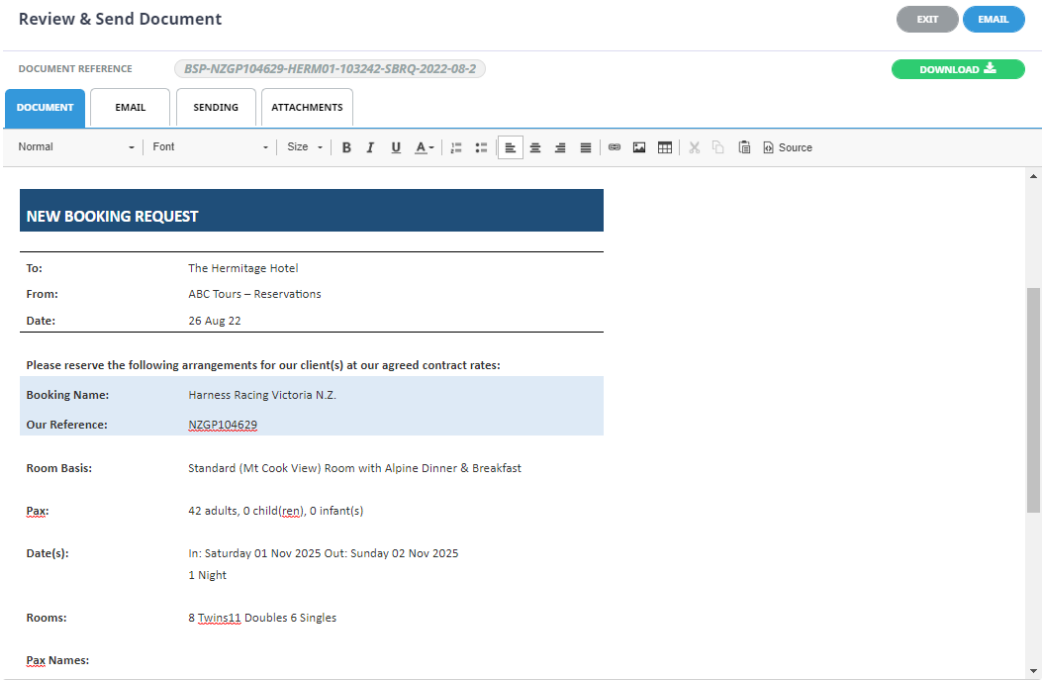
4. To view an existing message, select it and click **View Document**.

   VIEW DOCUMENT

   a. If the document can be edited, an **Edit Document** button will display.

      EDIT DOCUMENT

5. On the **Review & Send Document** screen, you can examine the generated document, download it (using the green Download button) and email.



NOTE: You can scroll the document in the Document tab even if no scroll bars are visible.

6. Click *Download* to download the document into Microsoft Word.
7. To email a document:
   a. Click the *Sending* tab.
   b. Enter one or more email addresses (click the *Search* icon to enter email addresses).
   c. Add a Subject.
   d. Click *Email* to send the email or click *Exit* to return to the list of documentation messages.
8. As with View Document, from here you can examine the generated document, download it or email it.
9. As with generating a new document Attachments can be selected to send with the re-generated message.

Document Filters

Filtering functions are available when searching for previously sent or generated messages within the Documentation message history. Large bookings may have a lengthy message history and document filters allow users to easily locate historical messages previously sent. Filter options include; particular message types, message statuses or perhaps who the message may have been addressed to or sent from.

Searching For Messages Using Message Filters

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47
2. Select menu **Groups > Operations and Accounts > Documentation**.
3. Click the + Document Filter heading to expand the filter options.
4. Complete the required filter fields.
5. Click **Ok** to apply the search filter.

6. Click **Clear** to clear the search filter.

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Document Filter Fields

Supplier

Selection for a specific supplier code, or supplier name will narrow the search to return messages for this supplier only.

Date From / To

If you know the approximate date the message was sent or generated. Enter a from and to date range to filter messages generated during this time. Otherwise the from date will automatically default to 3 months before todays date.

Addressed To

The filtered results will return for the email address.

Booking/PCMName

The name of the booking or PCM.

Sent By

The name of the Tourplan User who sent the message.

Message Type

Message Type selection allows results to return based on the message type checked.

Options available include; All, Agent Statement Messages, Booking Agent Messages, Debtor Receipt Messages, General Agent Messages, Invoice Messages.

Options available include; All, Booking Supplier Messages, Cheque Messages, General Supplier Messages, and/or Remittance Messages.

Options available include: Booking Agent Messages, Booking Supplier Messages, Invoice Messages, and/or Voucher Messages.

Message Status

Selection for all, individual or multiple message statuses allow the system to filter by; Filed, Generated, Printed, Sent and/or Uploaded Messages.

Supplier Message Generation

Supplier messages can be generated from your booking and sent to your suppliers, supplier messages could include:

- Supplier request messages
- Supplier amendment messages
- Cancellation messages
- Supplier Rooming and Name List Messages

The Documentation screen is where you generate, download and send documentation messages.

NOTE: The setting up of message templates and the technical aspects of messaging are not discussed here. This section simply describes generating and outputting messages. The assumption is that message formats have been defined. The Messaging sub-system is covered in the System Setup User Manual.

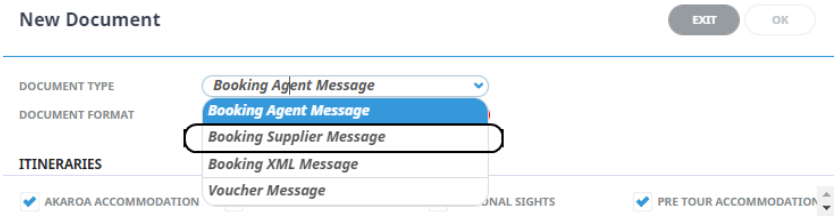
Generate a Supplier Documentation Message

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47

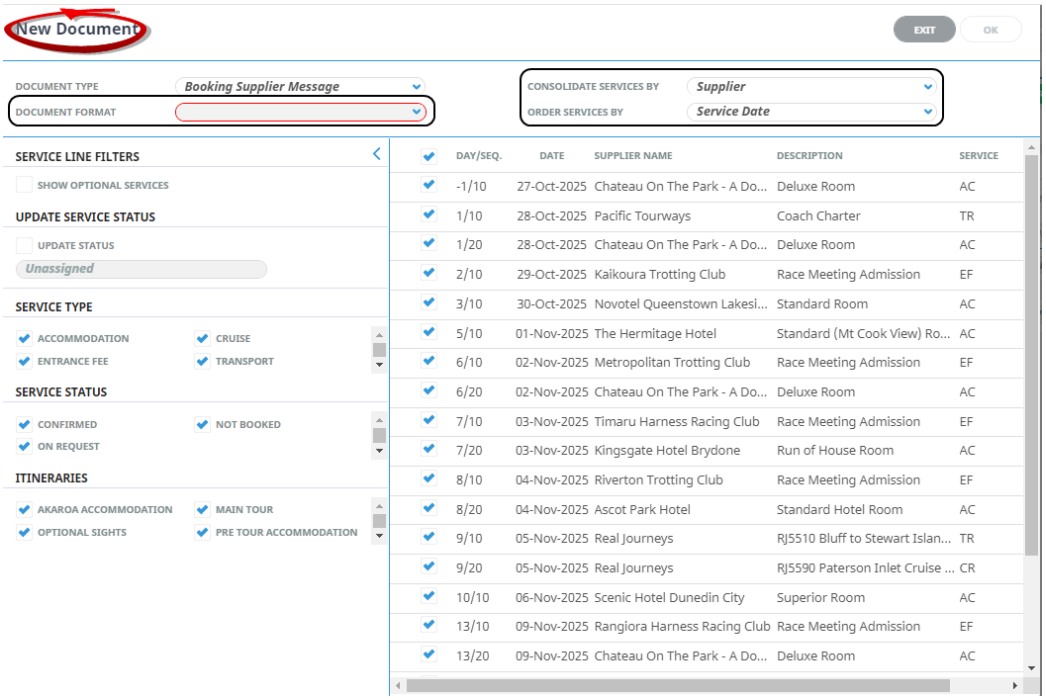
2. Select menu **Groups > Operations and Accounts > Documentation**.

3. To generate a new message, click **Generate Message**.

4. In the **New Document** screen select a Document Type and a Document Format. Select Consolidate Services By, and how the message is to Order the Services By.



5. A full list of services will display, select a *Document Format*, and how the services within the message are to consolidate and the order they are to display in the message.



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NOTE: Service line filter selections are available on the left of the screen. Users can select specific service types and/or service statuses to filter their message sending. There is also the option to update the status of the service.

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

   OK

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

   EXIT

8. On the Review & Send Document screen, a list of services will show on the left of the screen you can examine the generated document, download it (using the green **Download** button) or email (using the blue **Email** button).

   NOTE: 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.

9. Email and sending tabs are activated if the message template is setup to send as an email. The Email and Sending tabs allow 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.

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

    EMAIL

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

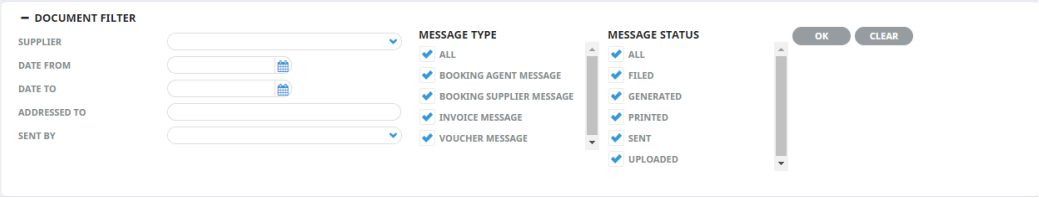
    EXIT

View and/or Generate Documentation Messages

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

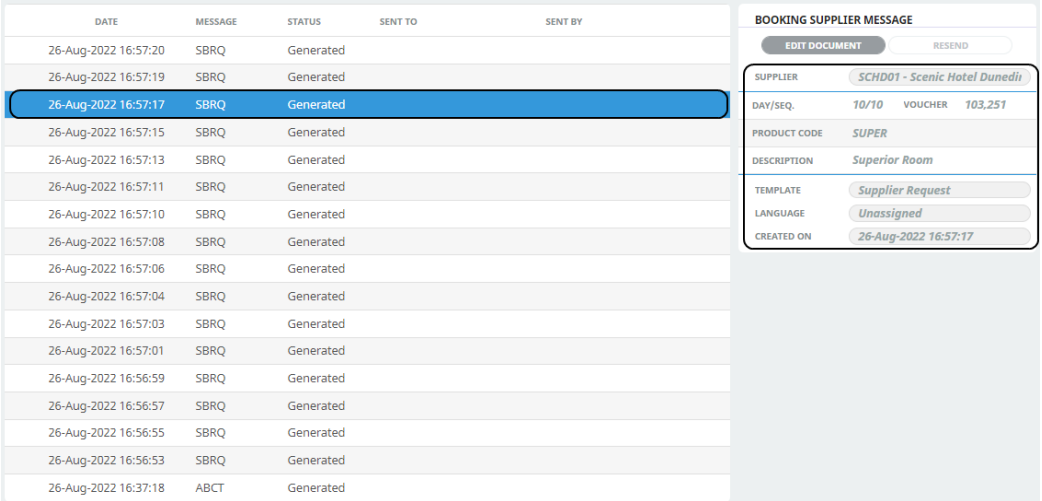
2. Select menu **Groups > Operations and Accounts > Documentation**.

   NOTE: Filters can be used categorise the messages. Select the + next to the Document Filter heading to see the search filters available.



3. Examine the **list of documentation messages**, if any. The top (and most recently worked on) messages highlighted.

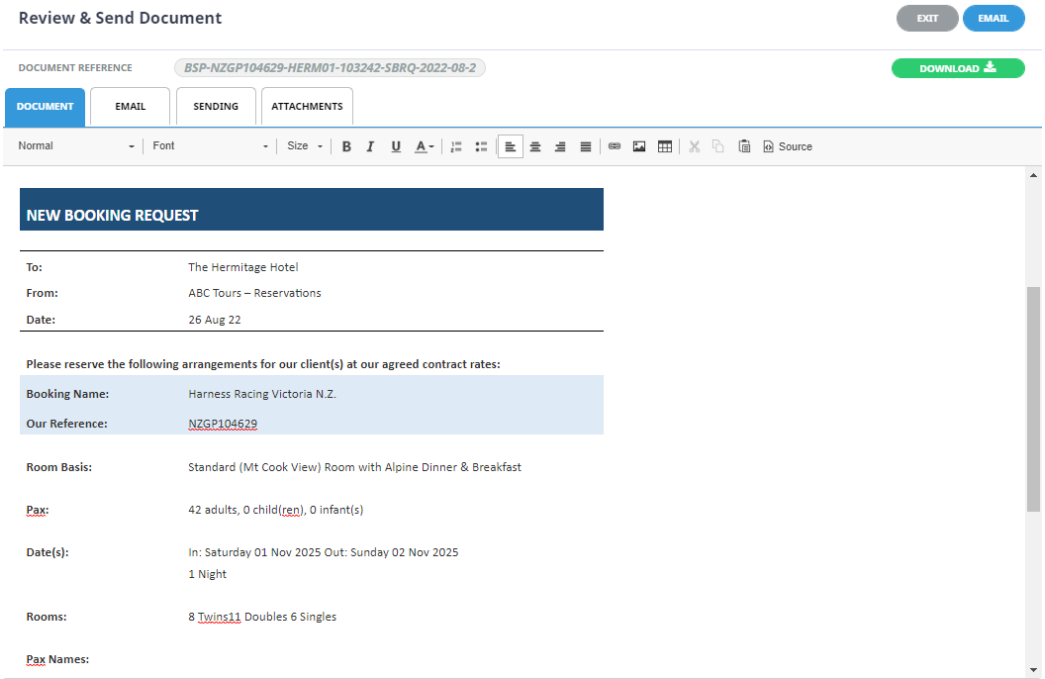
   The example messages were generated, however were not sent via an email. If an email was sent from Tourplan, the Sent To, and Sent By data would have recorded who the message was sent to and by whom.



4. To view an existing message, select it and click **View Document**.

   a. If the document can be edited, an **Edit Document** button will display.

5. On the **Review & Send Document** screen, you can examine the generated document, download it (using the green Download button) and email.



NOTE: You can scroll the document in the Document tab even if no scroll bars are visible.

6. Click *Download* to download the document into Microsoft Word.
7. To email a document:
   a. Click the *Sending* tab.
   b. Enter one or more email addresses (click the *Search* icon to enter email addresses).
   c. Add a Subject.
   d. Click *Email* to send the email or click *Exit* to return to the list of documentation messages.

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8. As with View Document, from here you can examine the generated document, download it or email it.
9. As with generating a new document Attachments can be selected to send with the re-generated message.

Bulk Copy

A Booking can be 'duplicated' to create multiple new Bookings with updated Travel Dates - using the Bulk Copy process.

Locate and open the original Booking you wish to copy, then choose Bulk Copy from the Operations and Accounts menu.

Within the Bulk Copy screen, you can enter new travel dates for each copied Booking. A sequence number will be added to the Booking Name and Booking Alias Name to help distinguish the original booking from the newly created copies.

All details from the original Booking are copied, including the Agent and Branch/Department. You can choose whether to include the Booking Notes and decide how service line prices should be recalculated for the copied Bookings.

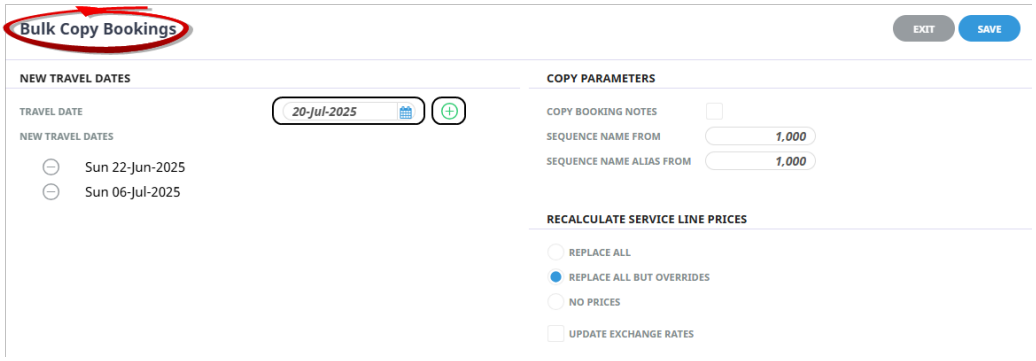
> Copied bookings should retain the original bookings rooming list pax names, changing a pax name in the copied booking will result in the re-naming of the original pax name found in the CRM.
>
> If a rooming list and pax names exist in the original booking, the correct procedure to copy a booking for a different group requires the creation of a new booking and the use of the 'Insert Booking' function to insert the old booking into the new booking. Click on the link for more information on the Insert Booking procedure.

Copy a Booking

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

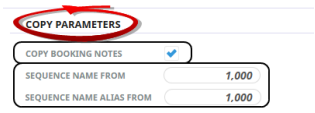
2. Select menu **Groups > Operations and Accounts > Bulk Copy**.

3. On the **Bulk Copy Bookings** screen, add new Travel Dates using the calendar selection, or manually entering a date, then select +, continue adding required Travel Dates.

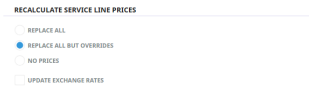


4. Complete the **Copy Parameters**: To copy notes from the source booking tick the **Copy Booking Notes** check box.

   NOTE: The **Sequence Name From**, and **Sequence Name Alias From** fields default to a value of 1,000. If a different sequence number is required you can update to a preferred number.



5. Select a method to **Recalculate Service Line Prices**. Click "About the Recalculate Booking Fields" on page 95 to learn more.



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

   SAVE

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

   EXIT

8. To view copied bookings, use the booking search feature. The newly created bookings will have a sequence number appended to the booking name. See "Retrieve an Existing Group Booking" on page 47.

About the Bulk Copy Booking Fields

New Travel Dates

Travel Date

Enter or select a travel date from the calendar selection, the green plus button is used to form a list of 'New Travel Dates' below.

New Travel Dates

Each Travel Date listed will create a new booking in the Bulk Copy process, and the services will update in the booking to match the New Travel Date.

Copy Parameters

Copy Booking Notes

All Booking notes will be copied to the new bookings if the checkbox is selected.

Sequence Name From

When a new booking is created from the copied booking in a bulk copy process, all booking details are copied including the Booking Name. This numerical setting is appended to the copied booking, and when multiple bookings are created the number will append sequentially starting with the value inserted here.

NOTE: If a Booking Name and sequence number already exist for a Booking, the system assigns the next available sequence number.

Sequence Name Alias From

When a new booking is created from the copied booking in a bulk copy process, all booking details are copied including the Booking Alias Name. This numerical setting is appended to the copied booking, and when multiple bookings are created the number will append sequentially starting with the value inserted here.

NOTE: If a Booking Name Alias and sequence number already exist for a Booking, the system assigns the next available sequence number.

Recalculate Service Line Prices

Replace All - Revisits the Tourplan Product Database and re-costs all services

All Except Overrides - Revisits the Tourplan Product Database however does not re-cost services where the original product rates were manually overridden. Manually overridden values to be confirmed with the OK Button.

No Prices - Recalculates the totals based on the existing service line values.

Updating 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.

Group Queue Entries

This is the fourth of six tasks described in this user manual for viewing or changing the following:

- Information about accounts, invoices and the tour window
- Operations details, including documentation, messaging and contacts

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "Accounts Summary" on page 135
2. "Tour Window" on page 146
3. "Documentation" on page 148
4. "Group Queue Entries" above (this task)
5. "Contacts" on page 164
6. Change History

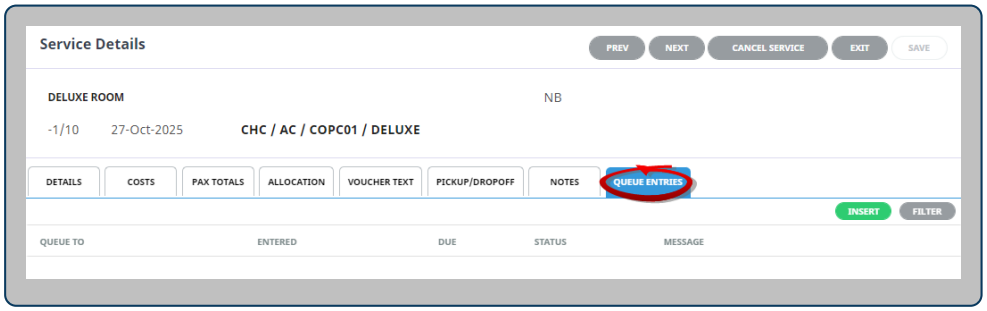
The Queue Entries screen displays queue messages that have been sent and received for the Booking. Clicking an entry will open it.

NOTE: The setup of Message Queues are covered in the System Setup User Manual.

A filter button is also available for searching previously sent Queued Message. When selected users will have the option to filter by who sent or received the message, the dates the message was due to be sent, the agent or supplier the message was sent to and you can even select the status of the message (Queued, Pending, Actioned or Archived). Open the following link to see the link for more on the Filter Queue Items selections.

View and/or Insert Queue Messages

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.
2. There are two locations that Queue Entries can be inserted, the first is from the Operations and Accounts menu (a booking level message).
   a. Select menu **Groups > Operations and Accounts > Queue Entries**.
   b. On the **Queue Entries** screen, examine the list of queue messages, if any.
3. The second is from the Itinerary Menu, when a service is selected (a service level queued message).
   a. Switch to the **Itinerary View** of the booking via menu **Group > Itinerary**.
   b. Select the **service** to send a Queue Entry for. This opens the *Service Details* screen, click on the Queue Entries Tab.



4. To add a queue entry to the booking, click **Insert**.

   INSERT

5. On the **Queue Message** screen, enter message details. Refer to "About the Queue Message Fields" on the facing page for information on each of the fields on the Queue Message screen.

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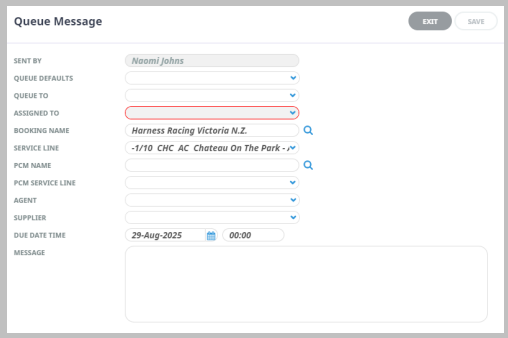
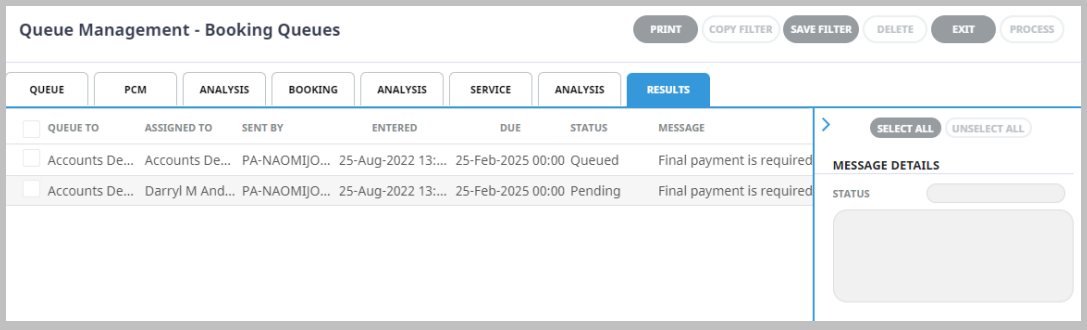
In this example the Queue Message entry is accessed from the Service Queue Entries tab populating the service line information.



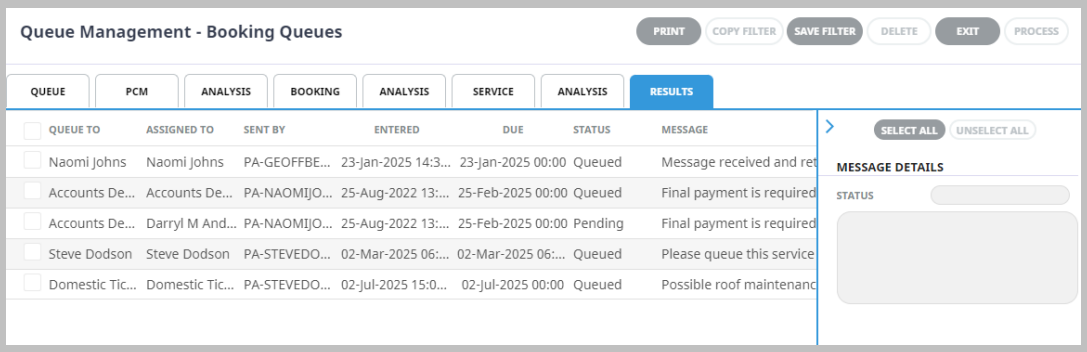
6. Click **Save** to keep the changes.

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

For this example, the queue entry was accessed from the Operations Menu > Queue Messages inserting a (booking) Queue Message of Final Payment is required (with an Assigned To value of *Accounts Department*) this message now appears in the list of queue entries for this booking:



The following example has limited filters applied, the content of the message will be visible in the Message Details section. To view click on a Queue Entry line.



About the Queue Message Fields

Sent By

Queue entry sent from user name.

Queue Defaults

The code and name for any defaults selected; e.g. TKTS Ticketing. Queue defaults are pre inserted text that can be selected to make sending of frequently used messages quicker. A good example of this could be TKTS - Ticketing Queue Defaults, when selected.

Queue To

Queue name (if used).

Assigned To

User or Group queue is assigned to.

Booking Name

Booking name, if you have the booking open and have used the FITs menu selection to select Queue Entries the booking name will automatically display in this field. The booking name displays from the Header of the booking, not the pax names from within the booking.

Service Line

A drop down of service selection allows users to select the specific service this message relates to.

PCM Name

Name of the PCM if the queue relates to a PCM.

PCM Service Line

A drop down of service selection allows users to select the specific PCM service this message relates to.

Queue Defaults

The code and name for any defaults selected; e.g. TKTS Ticketing. Queue defaults are pre inserted text that can be selected to make sending of frequently used messages quicker. A good example of this could be TKTS - Ticketing Queue Defaults, when selected.

Agent

Booking agent code and name.

Supplier

Service supplier code and name.

Due Date Time

Queue due date and time, this can be set to a specific date and time, or will default to the date and time of the system.

If a Queue Default has been selected the due date may default. In some cases message Queue Defaults will have been set up to have a reminder due date set. The system will send a notification reminder to the members of the Queue Destination depending on the setting defaulted. It may be so many days from today, number of days from service, number of days from travel date or a manual date. If a reminder due date has been pre-defined then the message due date will not be editable.

Message

Message text, this is a free format field. If a queue default has been selected, the text of the queue default will display in this field. Text can be added to if necessary.

Filtering for Previously Sent Messages

Messages can be searched for using the grey filter button. A screen opens with specific search filter criteria to show messages that have been previously sent.

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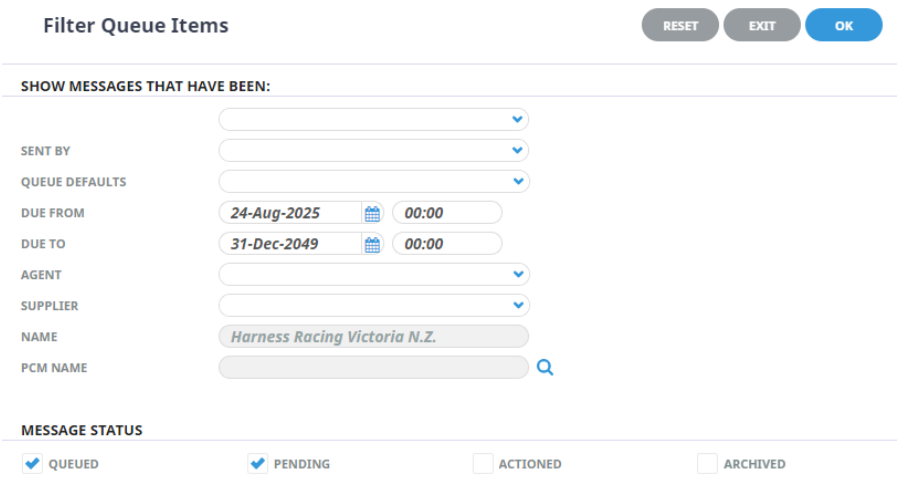


Filter Queue Items Fields

Sent To

A dropdown selection available to select who the queue message was sent to (either a User Name or a Group Queue Name).

Sent By

A dropdown selection available to select who the queue message was sent from (either a User Name or a Group Queue Name).

Queue Defaults

A dropdown selection available to select a pre-set Queue Default group.

Due From/To

Date and time selections to narrow the date time frame of when the queue was sent.

Agent

A dropdown selection available to select the Agent the queue message was sent to.

Supplier

A dropdown selection available to select the Supplier the queue message was sent to.

Name and PCM Name

The Booking Name/PCM Name fields are read only and populate from the booking/PCM open.

Message Status

Checkbox selection to filter and search for a Queue Message with a particular Message Status.

Contacts

This is the last of six tasks described in this user manual for viewing or changing the following:

- Information about accounts, invoices and the tour window
- Operations details, including documentation, messaging and contacts

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

1. "Accounts Summary" on page 135
2. "Tour Window" on page 146
3. "Documentation" on page 148
4. "Group Queue Entries" on page 160
5. "Contacts" above (this task)
6. Change History

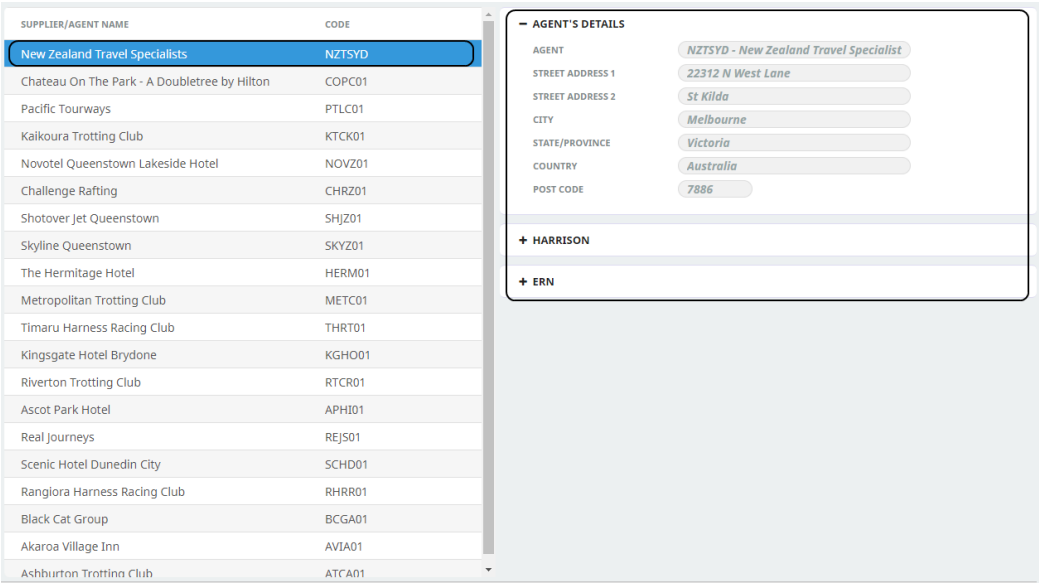
The Contacts screen displays all contacts for a booking.

View booking Contact Details

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing Group Booking" on page 47.

2. Select menu **Groups > Operations and Accounts > Contacts**.

3. On the **contact details** screen (left-hand side), select a service line under **Supplier/Agent Name** and expand the relevant section on the right-hand side.



In the example above, the service line selected on the left-hand side is **New Zealand Travel Specialists** and one of the three sections available on the right-hand side is expanded. Individual contact details attached to the Agent are available by expanding the contact name.

NOTE: Click the **-** (minus) icon in the section header label to collapse and the **+** (plus) icon to expand.

Contact details cannot be changed in this screen. Contact details are added and edited in the **Debtors** (i.e. Agents), **Creditors** (i.e. Suppliers) and **Code Setup** applications.

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Change History

This is an additional tasks which can be enabled and would become the sixth task available in the Operations and Accounts Menu. The procedure described in this document allows users to view:

- A Change History user interface itemising various changes which have happened within the booking.
- Further service drill-down are available to show:
  - The Tourplan User who made the change
  - The time the change was made
  - Old and new values per service for (Cost, Sell, Retail and Agent amounts)

NOTE: The numbering is simply for reference - there is no particular order in which tasks need to be completed and, depending on the booking, they might not all be needed.

The full list is:

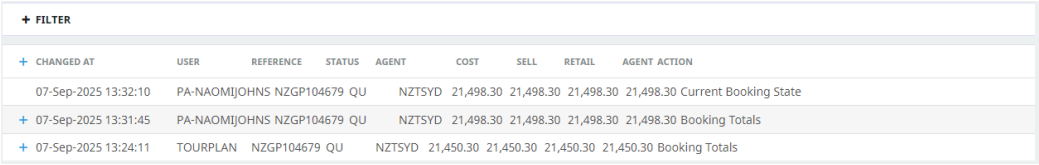
1. "Accounts Summary" on page 135
2. "Tour Window" on page 146
3. "Documentation" on page 148
4. "Group Queue Entries" on page 160
5. "Change History" above (this task)

View Change History

1. Search for and retrieve a booking to work with. If you haven't done this already (see "Retrieve an Existing Group Booking" on page 47).

2. On the **Change History** screen, examine the list of changes from the table.

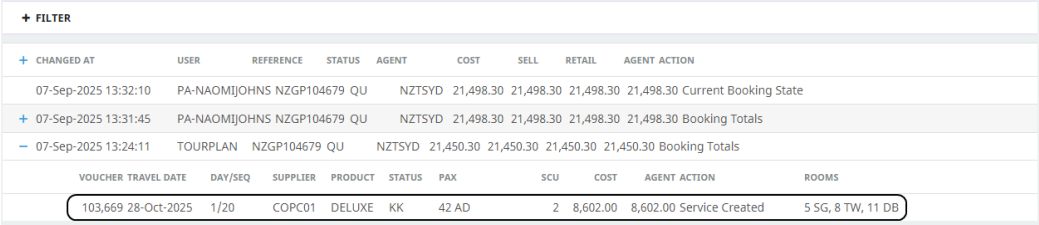
   NOTE: Changes will display in date order most recent first.



+ FILTER

+	CHANGED AT	USER	REFERENCE	STATUS	AGENT	COST	SELL	RETAIL	AGENT	ACTION
	07-Sep-2025 13:32:10	PA-NAOMIJOHNS	NZGP104679	QU	NZTSYD	21,498.30	21,498.30	21,498.30	21,498.30	Current Booking State
+	07-Sep-2025 13:31:45	PA-NAOMIJOHNS	NZGP104679	QU	NZTSYD	21,498.30	21,498.30	21,498.30	21,498.30	Booking Totals
+	07-Sep-2025 13:24:11	TOURPLAN	NZGP104679	QU	NZTSYD	21,450.30	21,450.30	21,450.30	21,450.30	Booking Totals

3. To view specific change data, click on the **action line** to drill-down further.



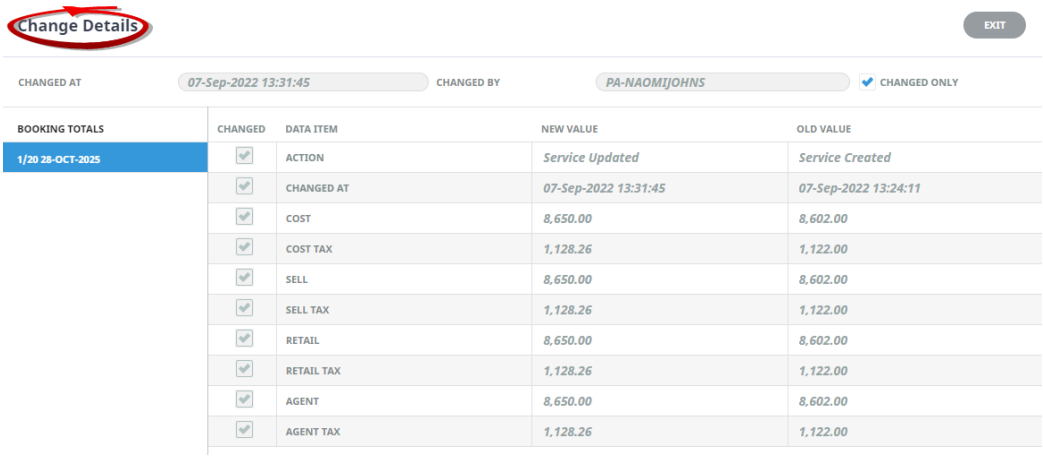
+ FILTER

+	CHANGED AT	USER	REFERENCE	STATUS	AGENT	COST	SELL	RETAIL	AGENT	ACTION
	07-Sep-2025 13:32:10	PA-NAOMIJOHNS	NZGP104679	QU	NZTSYD	21,498.30	21,498.30	21,498.30	21,498.30	Current Booking State
+	07-Sep-2025 13:31:45	PA-NAOMIJOHNS	NZGP104679	QU	NZTSYD	21,498.30	21,498.30	21,498.30	21,498.30	Booking Totals
−	07-Sep-2025 13:24:11	TOURPLAN	NZGP104679	QU	NZTSYD	21,450.30	21,450.30	21,450.30	21,450.30	Booking Totals

VOUCHER	TRAVEL DATE	DAY/SEQ	SUPPLIER	PRODUCT	STATUS	PAX	SCU	COST	AGENT	ACTION	ROOMS
103,669	28-Oct-2025	1/20	COPC01	DELUXE	KK	42 AD	2	8,602.00	8,602.00	Service Created	5 SG, 8 TW, 11 DB

4. The **Change Details** screen will open, the header of the screen identifies the; consultant; date and time the change was made. A list of services will display in the column to the left of the screen.

   NOTE: The default view on initial entry will be the Booking Totals view. Change actions per service are available when individual service dates are selected.



5. Click **Exit** to Exit the Change Details View.

6. Click **Exit** to Exit the Change History.

About the Change History Fields

Booking Totals

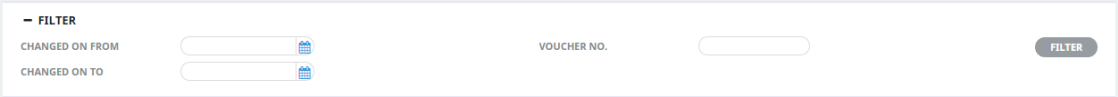
An overall booking totals screen allows users to see the booking value changes for the entire booking. Changed Data Items are identified and listed in a table showing the new and old values for the booking.

Service Change History

Opening a specific change action will display further details of the changes per service.

Change History Filter

Filters can be applied to narrow the search criteria. Filters include 'Changed On' (To and From) fields and an option to filter by Voucher Number.



New Value / Old Value

For each service drill-down opended users will be able to see the value of the service prior to the change and the service value after the change was made.

Change Details are recorded for the following actions:

Action	Definition
Booking Created	When the booking was created.
Service Created	Records when the service was created.
Current Booking State	Records the status / state of the booking.
Booking Updated	Records when a booking has been updated.
Service Updated	Records the service line details which have been updated.
Booking Totals	Records when booking values have been updated.
Booking Deleted	Records if a booking was deleted.
Service Deleted	Records if a service was deleted.

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APPENDIX

Supporting Information

The appendix includes reference material and supporting information that supplements this document's chapters.

In this chapter ...

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Tour Window Columns 173

TOURPLAN

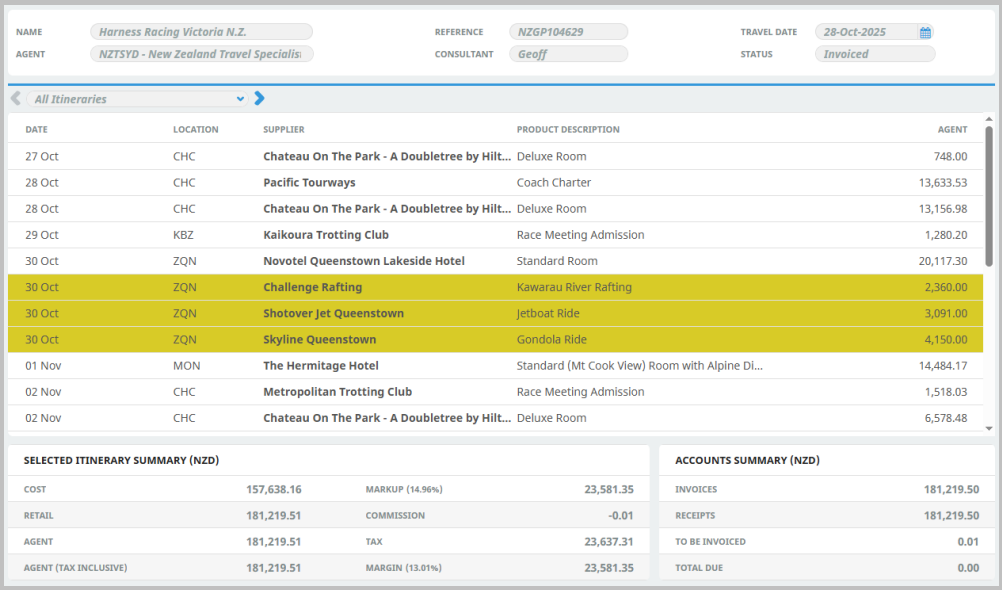
Appendix 1 - Scroll Column Headings

All column headings are now visible when screen scrolling is activated.

Change Default Column Headings

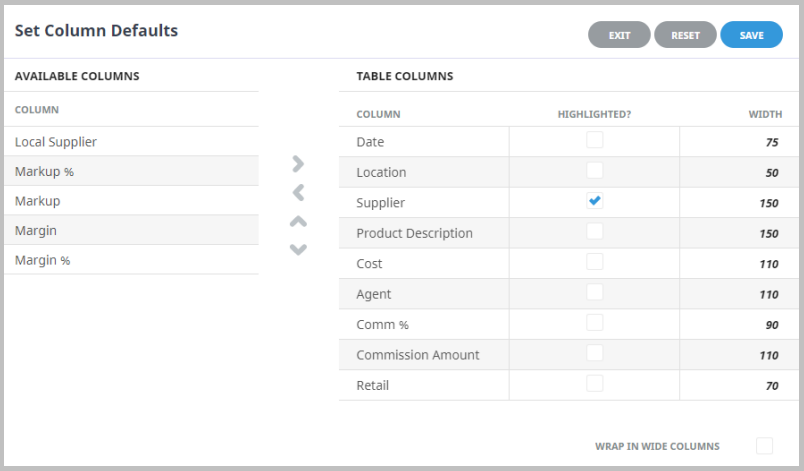
1. Click anywhere in the white space of a list's column headings.

For example, retrieve a booking and, on the Dashboard, click the white space between column headings *Supplier* and *Product Description* in the list of services returned:



2. On the **Set Column Defaults** screen, check a column heading label to make it visible (and uncheck to hide it). You can also use the *Highlighted?* check boxes to make a column bold, and specify the width of columns.

For example, check Cost under *Visible?* and also under *Highlighted?* to display that column with bold font in the list:



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

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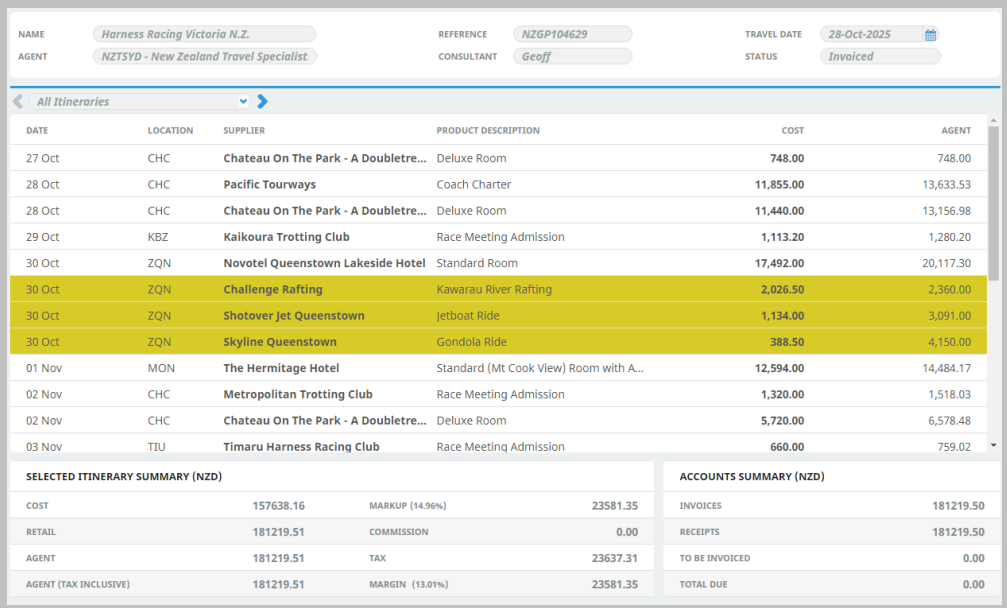
4. The list is immediately updated to reflect the new defaults chosen.

The updated services list now shows an additional *Cost* column and displays it with bold font (no other defaults changed):



NAME: Harness Racing Victoria N.Z. | REFERENCE: NZGP104629 | TRAVEL DATE: 28-Oct-2025
AGENT: NZTSYD - New Zealand Travel Specialist | CONSULTANT: Geoff | STATUS: Invoiced

All Itineraries

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	COST	AGENT
27 Oct	CHC	Chateau On The Park - A Doubletre...	Deluxe Room	748.00	748.00
28 Oct	CHC	Pacific Tourways	Coach Charter	11,855.00	13,633.53
28 Oct	CHC	Chateau On The Park - A Doubletre...	Deluxe Room	11,440.00	13,156.98
29 Oct	KBZ	Kaikoura Trotting Club	Race Meeting Admission	1,113.20	1,280.20
30 Oct	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	17,492.00	20,117.30
30 Oct	ZQN	Challenge Rafting	Kawarau River Rafting	2,026.50	2,360.00
30 Oct	ZQN	Shotover Jet Queenstown	Jetboat Ride	1,134.00	3,091.00
30 Oct	ZQN	Skyline Queenstown	Gondola Ride	388.50	4,150.00
01 Nov	MON	The Hermitage Hotel	Standard (Mt Cook View) Room with A...	12,594.00	14,484.17
02 Nov	CHC	Metropolitan Trotting Club	Race Meeting Admission	1,320.00	1,518.03
02 Nov	CHC	Chateau On The Park - A Doubletre...	Deluxe Room	5,720.00	6,578.48
03 Nov	TIU	Timaru Harness Racing Club	Race Meeting Admission	660.00	759.02

SELECTED ITINERARY SUMMARY (NZD)

COST	157638.16	MARKUP (14.96%)	23581.35
RETAIL	181219.51	COMMISSION	0.00
AGENT	181219.51	TAX	23637.31
AGENT (TAX INCLUSIVE)	181219.51	MARGIN (13.01%)	23581.35

ACCOUNTS SUMMARY (NZD)

INVOICES	181219.50
RECEIPTS	181219.50
TO BE INVOICED	0.00
TOTAL DUE	0.00

Group Booking Dashboard Columns

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on the previous page.

Bookings and Quotes > Groups > Dashboard

Column Heading	Description
* Date	The service date.
* Location	Service location code.
* Supplier	The service supplier name.
Local Supplier	The service supplier local name (if field is used)
* Product Description	Service (i.e. product) full description.
Date	Date of service.
* Out/SCU	Service "check out" date for service or number of second charge units.
* Status	Service status.
Cost	The service line cost applied to the booking.
Markup %	Markup as a percentage.
Markup	Markup currency value.
Retail	Retail value - cost plus markups.
Comm %	Commission as a percentage.
Commission Amount	Commission currency value.
* Agent	Agent price – cost plus mark-ups less commission.
Margin $	Margin value of the service as a currency value.
Margin %	Margin value of the service as a percentage.

Group Booking Itinerary Columns

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on page 168.

Bookings and Quotes > Groups > Itinerary

Column Heading	Description
*Day/Seq	Day and sequence of service.
*Location	Service location code.
Location Name	Service location description.
Supplier	The service supplier code.
*Supplier Name	The service supplier full name.
Local Supplier Name	An alternative name for service suppliers local name.
Service	The service code.
Product Code	The service (i.e. product) code.
*Product Description	Service (i.e. product) full description.
Product Comment	Comments added to the service.
*Date	The date of the service.
Day	The day of the service.
*Out/SCU	Service out date (accommodation) or number of second charge units (non accommodation).
*Status	Service status.
PC	Price Code.
Remarks	The remarks field from the Pickup/Drop Off screen.
Supplier Conf.	Supplier Confirmation field in the booking service line.
*Voucher No.	Voucher number.
Voucher Status	Voucher status.
Notes	A flag (i.e. check-box) to indicate if notes have been added to the service.
Cost	The service cost price.
Sell	The service sell price.
Markup %	Markup as a percentage.
Markup	Markup currency value.
Retail	Retail value - cost plus markups.
Comm %	Commission as a percentage.
Commission Amount	Commission currency value.
*Agent	Agent price – cost plus mark-ups less commission.
Margin $	Margin value of the service as a currency value.
Margin %	Margin value of the service as a percentage.
Override	A flag (i.e. check-box) to indicate if the costs have been over-ridden.
Rate Name	Product database Date Range/Details Screen rate name.
Rate Name 2	Product database Date Range/Details Screen rate name 2. A second field to display an additional/alternative rate name.
Rate Text	Product database Date Range/Details Screen rate text.

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Column Heading	Description
Rate Text 2	Product database Date Range/Details Screen rate text 2. A second field to display an additional/alternative rate text.
Rate Status	The status description of the rate from the product database. The standard definitions are: » Confirmed » Provisional » Terminal » Closed » Manual
Assigned	A flag (i.e. check-box) to indicate if Driver/Vehicle/Guide assignments have been made for the service.
Disc/Mup Seq	Sequence number of the Discount/Markup matrix record applied to the service.
Disc/Mup Code	Code of the Discount/Markup matrix record applied to the service.
Comm Seq	Sequence number of the Commission matrix record applied to the service.
Comm Code	Code of the Commission matrix record applied to the service.
ESI Name	External service adapter name.
ESI Description	External service adapter description.
PCM Link	A flag (i.e. check-box) to indicate if the services of a copied in PCM are still linked to the PCM.
Linked PCM Name	The names of any PCMs inserted into the booking that are retaining the link to the PCM pricing.
Linked PCM Name Alias	An alternative PCM name field of any PCMs inserted into the booking that are retaining the link to the PCM pricing.
Package PCM Name	The name of any Package PCMs inserted into the booking.
Package PCM Name Alias	An alternative PCM name of any Package PCMs inserted into the booking.
Last Worked Date	Date the service line was last worked on.
Last Worked By	Last worked by user name.
Pickup Date Time	Service Pickup Date and Time (DD-MMM-YYYY 00:00:00)
Dropoff Date Time	Service Drop off Date and Time (DD-MMM-YYYY 00:00:00)

Service Line Insert (Service Scroll Headings)

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on page 168.

Bookings and Quotes > Groups > Itinerary Insert Service

Column Heading	Description
Source	Where the rate is sourced from - Internal rate (or External rate if Supplier connectivity is operational).
Location	Service location code.
Location Name	Service location name.
Local Supplier Name	Local supplier full name.
Locality	The locality of the service.
*Service	The service code.

Column Heading	Description
*Service Name	Service (i.e. product) full description.
Supplier	The service supplier code.
*Supplier Name	The service supplier full name.
Local Supplier Name	An alternative name for service suppliers local name.
Code	Supplier code. Descriptive hyperlinks will open tabs for you to browse descriptive information.
*Description	Drill down link to view more information (Supplier amenities/ Service amenities, Rate information including age policies and room capacity, Allocation information, and Supplier or Product Notes). Descriptive hyperlinks will open tabs for you to browse descriptive information.
*Comment	Comment field of the service (if used).
Class	The class of the service.
Rate Name	The rate name of service rate period. (2 field columns)
Rate Name 2	Product database Date Range/Details Screen rate name 2. A second field to display an additional/alternative rate name.
Rate Text	The rate text of service rate period. (2 field columns)
Rate Text 2	Product database Date Range/Details Screen rate text 2. A second field to display an additional/alternative rate text.
Available	Availability of the service, on request or OK (confirmed availability).
Price Code	The price code of the service.
Price Code Desc	The description of the price code for this service.
Cost	The service cost price.
*Retail	Retail value - cost plus markups. (includes booking, itinerary or pax range markup, or product discount/markup form the DCM.
*Agent	Agent price – cost plus mark-ups less commission.
Min SCU	Minimum second charge units (e.g. minimum nights stay).

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Tour Window Columns

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on page 168.

Bookings and Quotes > Groups > Operations and Accounts > Tour Window (AR Transactions tab)

Column Heading	Description
* Agent	The code of the agent the transaction has been issued against.
* Date	The transaction date.
* Reference	The transaction reference.
* Apply	The transaction apply reference. In the case of credit notes and receipts, this is the invoice reference that the credit note or receipt applies to.
* Type	The transaction type (Invoice; Credit Note; Receipt).
* Currency	Transaction currency.
* Trans Amount	The transaction amount in transaction currency.
* Rate	The exchange rate used in the transaction.
* Booking Amount	The transaction amount in booking currency.

Bookings and Quotes > Groups > Operations and Accounts > Tour Window (AP Transactions tab)

Column Heading	Description
* Supplier	The supplier the transaction has been issued against.
* Date	The transaction date.
* Reference	The transaction reference.
* Apply	The transaction apply reference. In the case of credit notes and receipts, this is the invoice reference that the credit note or receipt applies to.
* Type	The transaction type (Invoice; Credit Note; Cheque).
* Currency	Transaction currency.
* Trans Amount	The transaction amount in transaction currency.
* Voucher No.	The voucher number of the service.
Due Date	The transaction due date.
* Rate	The exchange rate used in the transaction.
* Booking Amount	The transaction amount in booking currency.

Bookings and Quotes > Groups > Operations and Accounts > Tour Window (Vouchers tab)

Column Heading	Description
* Voucher	The voucher number.
* Date	The service date.
* Supplier	The service supplier code.
* Currency	The service line currency.
* Rate	The service line exchange rate between Service Line currency and Booking currency.
* Expected Cost	The normal service line cost without a voucher.
* Vouchered Cost	The service line amount actually vouchered.
* Actual Cost	The service line cost applied to the booking.
Invoiced	Amount invoiced.
Credited	Voucher amount credited.

Column Heading	Description
Paid	Amount paid.
* Outstanding	Any unpaid amount of an unclosed voucher.
* Voucher Status	The voucher status.
* Under/Over	The difference between the Vouchered value and the Invoice value.
Voucher Closed	The date the Voucher was closed.
Supplier Name	The service supplier name.
Product Code	The code of the product. (Up to 6 characters)
Product Description	The descriptive name for the product.
Remarks	The remarks fields from the pickup/drop off screen.
Status	The status of the service.

Mark Up / Commission Columns

Column Heading	Description
* Date	The date of the service.
* Location	Service location code.
* Product Description	Service (i.e. product) full description.
* Cost	The sum of the 'Cost' values for each of the services in the Booking from the product database.
* (Cost) Markup	The amount of any Booking Markup (markup applied in the Markups/Commissions Screen).
* (Cost) Markup%	An on-screen percentage calculation (i.e. not stored in the system) of the difference between Cost and Retail.
* Retail	The sum of the cost price plus all types of markup (database markup and Booking markup).
* (Retail) Comm	The value of any agent commission (commission being paid to the debtor/agent attached to the Booking), which is deducted from the retail price.
* (Retail) Comm %	An on-screen calculation (i.e. not stored in the system) of the Commission value expressed as a percentage of the Retail total.
* Agent	The sum of Retail less Commission = the price the agent/debtor will pay.
Margin	The value added to the cost after Agent Commission has been applied.
Margin %	An on-screen calculation of the Margin value expressed as a percentage.
Supplier Name	The service supplier full name.
Local Supplier Name	If local fields are used, the service supplier local name.
Service	The service code.
(Product) Code	The service (i.e. product) code.
Product Comment	Service product comment.
* Product Description	Service (i.e. product) full description.

Communications Columns

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on page 168.

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Bookings and Quotes > Groups > Operations and Accounts > Documentation

Column Heading	Description
* Date	Date and time message generated.
* Message	Message or document text.
* Status	Current status of the message or document.
* Sent To	Recipient of the message or document.
* Sent By	User name that generated the message.
Type	The message type sent. Type: Booking Agent, Booking Supplier, Invoice, Voucher etc.
Destination	Email destination.

Bookings and Quotes > Groups > Operations and Accounts > Queue Entries

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).

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