TOURPLAN

PCM Packages User Manual

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

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CHAPTER 1

Getting Started with PCM Packages

This document explains the set up of packages in Tourplan-NX.

‘Packages’ in Tourplan are very specific, regardless of what a user company may think a ‘package’ is. For example, a single product set up in the Product Database as a 3-night stay at a resort, including use of water sports equipment and all meals is not a package in the Tourplan sense. The definition of a package in Tourplan is:

"A collection of products stored in a PCM, which has a specially coded Database Product attached that controls the total package selling prices, restrictions and conditions."

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The setup steps (e.g. "Adding PCM Code Data" on page 17) may have been completed for you during system installation - check with your system administrator.

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About the User Manuals

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

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

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

User Manuals are available 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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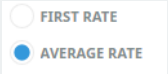
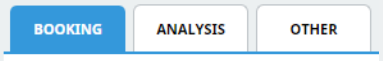
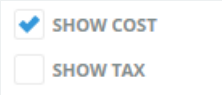
Getting Started With Tourplan NX

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.

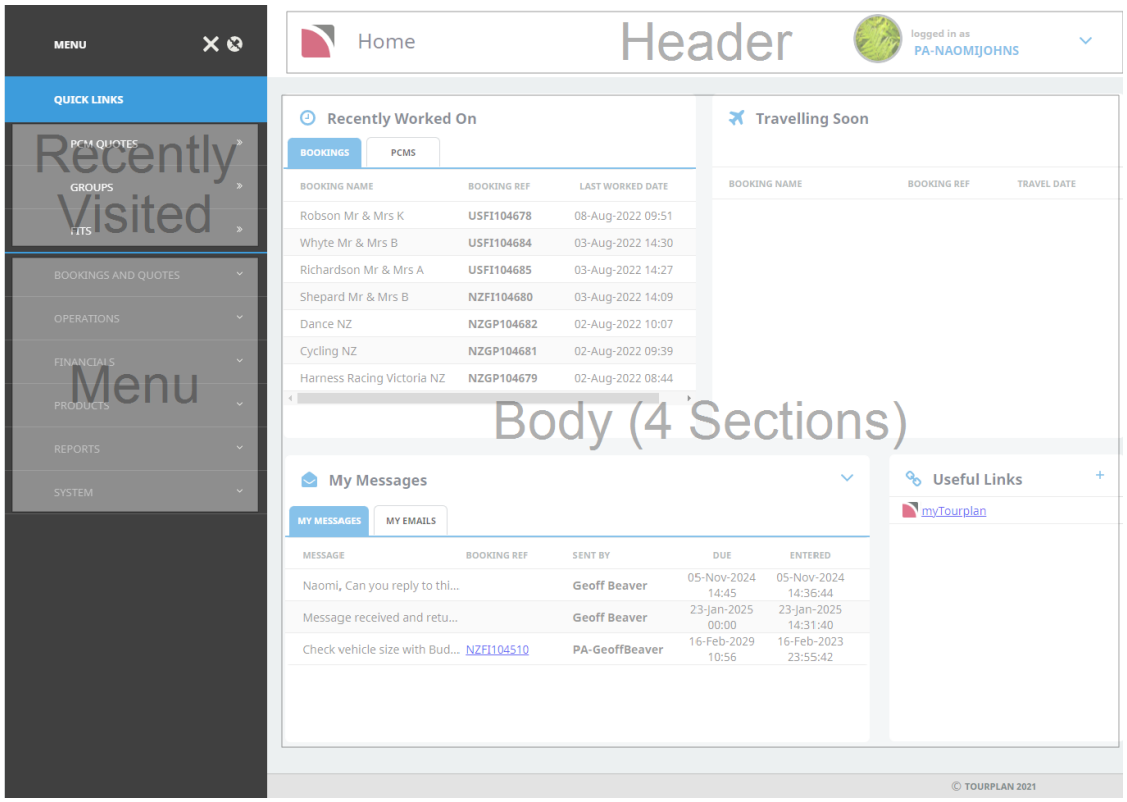
About the Landing Page

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.

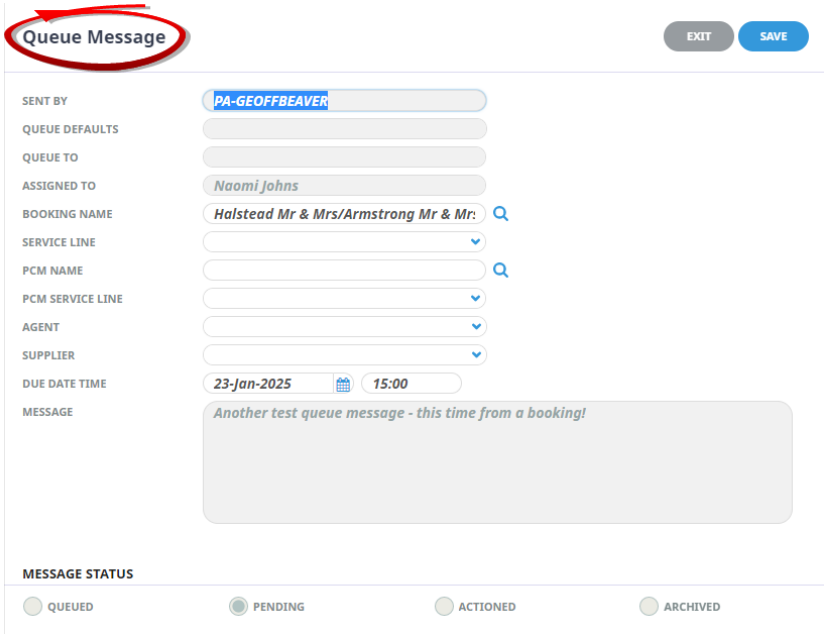
Bookings can be opened from the dashboard and the received message replied to from within the booking.

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

Respond to a Message in My Messages

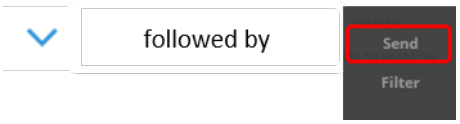
Messages can be responded to and the message status updated.

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

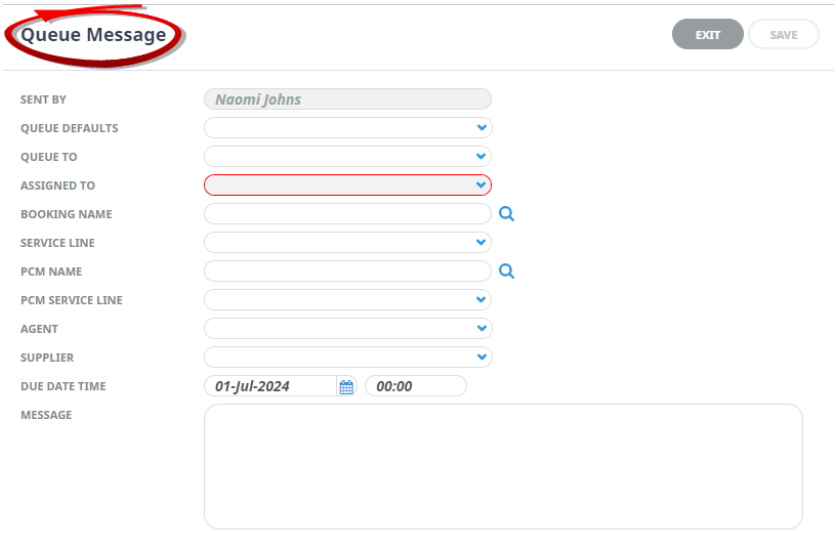


2. Modify any fields that might need updating and click **Save**.

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**.

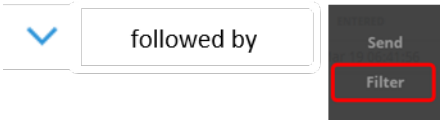


4. On the new **Queue Message** screen, assign an internal queue message to one or more colleagues. The message can identify a specific booking/PCM, Agent or Supplier for reference.

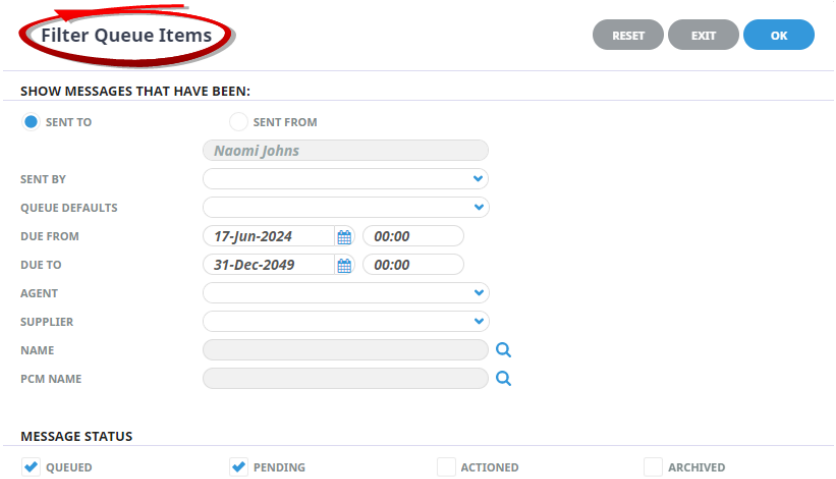


5. Click **Save** to send the message.

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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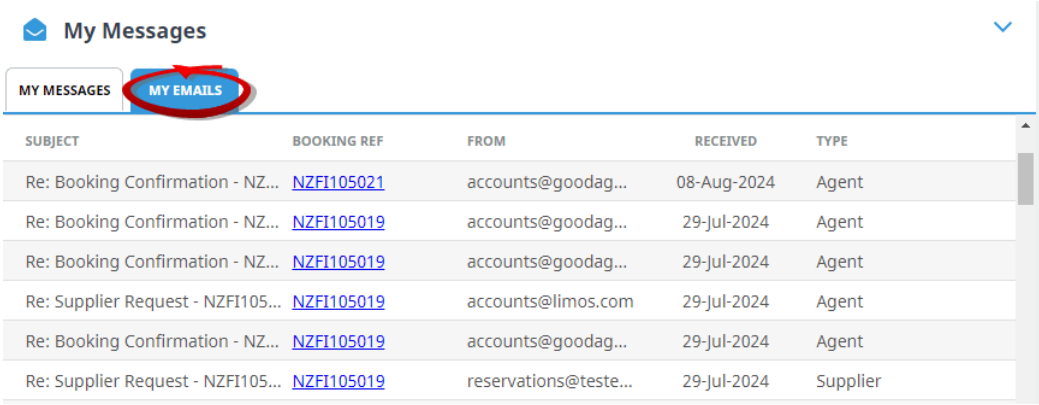
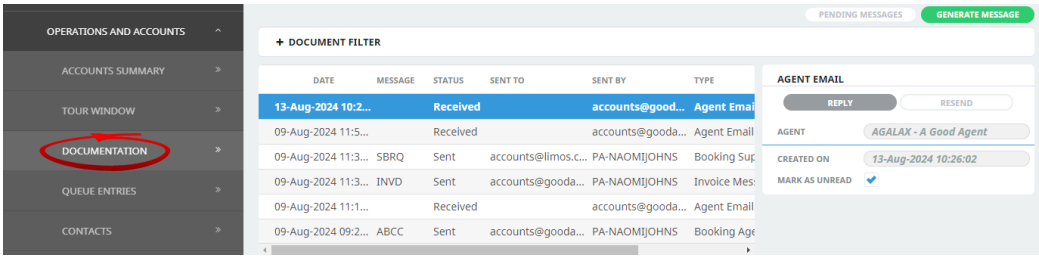
View Received Emails & Open PCM

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.

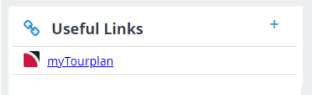
A number sequence provides the order the URL Name will display on the Dashboard.

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

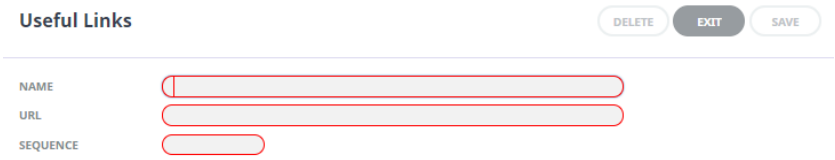
If the user no longer wants the URL to display a Useful Link can be removed from the Code Setup application. A System Administrator with access to Code Setup can change or remove a URL.

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.

Menu Breadcrumb Trails

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

1. Click the **Product** menu to expand it:

2. Click the **PCM Package Setup** to go to the PCM Package:

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.

Pre-Costed Modules (PCMs)

PCMs can be Quotations, Modules or Packages. This topic introduces each type and provides an example of the pricing model used for PCMs.

Quotations

Prepare Group and/or FIT quotes, which can have:

- Multiple passenger ranges, costed simultaneously.
- Different markup/commission levels by passenger range (if required).
- Different markups applied to product components by passenger range (if required).
- The ability to price costs across a date range (if required).
- User-defined documentation for output to agents – Quotations, Itineraries etc.

Modules

This feature allows modules of products to be entered into a PCM, which can then be copied into a booking. For example, if all bookings or quotations include common products – admin fees, M&G fee, communications fee etc., then these products can be put into a PCM and, when a new booking or quotation is being prepared, the PCM products can be copied into the new booking or quotation, eliminating the need to manually enter each product individually.

Packages

A package is a collection of products which, when pointed to by a specific Product, becomes a "Package" that is able to be booked in the FITs module as either a "Seat in Coach" type package or an FIT-type package; e.g. "Fly-Drive". The package setup determines whether the package is sold as a Seat in Coach or FIT-type package. A package can also be inserted into a Group Booking if settings allow the package to be sold in the Groups Application.

The PCM module is connected to the Tourplan Product Database to allow instant recall of products and pricing. Prices are calculated automatically based on the PCM "base" date, agent settings and database settings (e.g. FOC policies and escort, driver and guide entitlements).

Functions are also available to download and print, email or fax documentation from within a PCM.

NOTE:

- The process of inserting PCMs into bookings is covered in the Groups User Manual and the FITs User Manual.
- Operationally, the setup of a PCM is the same, regardless of its ultimate use. Whether it is a Master Module, a Package or an ad-hoc quotation, the setup process is the same.

PCMs and Room Type v Per Person Pricing

Pricing in PCMs is calculated as "Per Person (Half) Twin Share" with supplements or reductions from the Share Twin price for Singles and Triples and Quad rooms. This is because, in PCMs, the quantity and type of rooms are never known, so room-based pricing cannot be calculated. This method of pricing is also typically used by tour operators when they publish brochures; the prices are shown as "Per Person $nnnn.nn" and "Per Person Single $nnnnn.nn". The single room price will always be more expensive than the Half Twin price because the person is paying for sole occupancy of a room that generally could accommodate more than one.

The situation can seem confusing because accommodation suppliers normally provide rates on a Per Room basis, not a Per Person basis. Tourplan can output (and store) pricing in both formats, but in PCMs the costs are always displayed on a Half Twin/Single Supplement basis.

The following example is based on:

- A standard room (max 3 adults)
- Double/twin occupancy at $200.00 per room
- Additional adult at $40.00 each

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Room Pricing	Cost	Comment
1 adult	$200.00	
2 adults	$200.00	$100 per adult
3 adults	$240.00	$200 plus $40

Per Person Pricing	Cost	Comment
Per Person Half Twin	$100.00	2 pax at $100 each = $200
Single Supplement	$100.00	$100 half twin + $100 single supplement = $200
Triple Reduction	$20.00	$100pp half twin less $20pp triple reduction = $80 x 3 = $240

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Types of Packages

There are two distinct types of 'Packages' that can be processed in Tourplan:

- **Group Scheduled Tours** (also known as "Series Tours"). A Group Scheduled Tour is a coach tour type of package that has seats sold to a number of FIT passengers; i.e. the Tourplan user company is selling 'seats' on a group tour. These types of packages must have specific departure dates, and the passengers travel as a group. The Escort/Driver carries vouchers covering the complete group.
- **FIT Packages**. A FIT Package is a package in which the passengers travel independently (scheduled transport, rental car etc.) and carry vouchers themselves for each product in the package. These can operate on a scheduled or daily basis.

The setup steps to operate both types of package are very similar, but because of the different choices available, they are covered separately here.

Scheduled Group Tours Overview

There are two key points regarding Group Scheduled/Series Tours:

- First, they are scheduled; i.e. they have set departure dates (typically published in a brochure), and
- second, bookings for these tours are received in the form of FIT bookings and each tour departure is then operated (in terms of supplier correspondence) as a group tour, with all of the FIT bookings for that departure 'Rolled Up' on the Group Tour.

There are four setup steps to create scheduled group tours:

1. Create a PCM with all of the products that are in the scheduled group tour.
2. Create a special Product Database product ('Package Price Product') that holds the selling prices for the scheduled group tour.
3. Attach the Package Price Product to the PCM.
4. Set the tour departure dates.

Component Tours

NOTE: "Component" package tours; i.e. those tours that are made up of two more 'component' tours, which can be sold as tours in their own right. Detail on setting up Component Tours is available from the local Tourplan office.

FIT Package Tours Overview

Packaged FIT tours generally have NO set departure (i.e. start) dates. These tours may be as simple as, for example, a 3-day City stay-put, including only a hotel and transfers, or it can be an all-inclusive 14-day self-drive holiday.

The initial setup of this style of package tour is also done as a PCM. For FIT Packages, typically only one Pax Range based on 2 pax is required.

There are three setup steps required to create FIT Package Tours:

1. Create a PCM with all of the services that are in the FIT Package Tour.
2. Create a special Product Database service ('Package Price Product') which holds the selling prices for the FIT Package tour.
3. Attach the Package Price Product to the PCM.

Also, optionally:

4. Populate the Substitutions List in the PCM with substitutable services.

Non Accommodation Packages

Traditional packages include accommodation services whereas Tourplan has an additional feature allowing a package price for non-accommodation services.

Package Non-Accommodation non-accommodation packaged products can insert into a quote or booking for a per group price. Pax breaks are used when the division of pricing varies depending on the number of travelling passengers. Click on the link to find out more about "Package Non-Accommodation" on page 65.

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Adding PCM Code Data

Before creating any Group Scheduled Tours or FIT Package Tours, the following steps must be completed to add required code data to the database:

- PCM Status Codes:
- PCM Consultants:

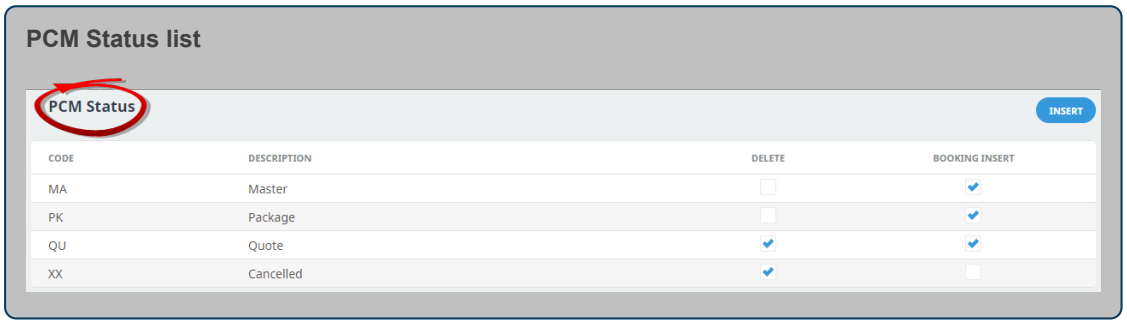
NOTE: If Consultants have already been set up for use in FITs or Groups, they will be available here.

PCM Status Codes

These have been pre-coded in your system by your Tourplan Administrator, selection of PCM Status Codes may differ depending on your user company's procedures.

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

There can be different status codes to indicate the current status of a particular PCM; e.g. Master, Package, Quote, Cancelled etc. The example shows a list of typical PCM status codes.



CODE	DESCRIPTION	DELETE	BOOKING INSERT
MA	Master	☐	☑
PK	Package	☐	☑
QU	Quote	☑	☑
XX	Cancelled	☑	☐

PCM Consultants

If you are unable to insert PCMs it may be because your user name needs to be set up as a consultant. See your Tourplan Administrator if you are receiving an error when trying to create a PCM.

Adding a PCM Consultant comprises two mandatory tasks before a new PCM can be created:

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

PCM Analysis Codes

Up to 6 PCM analysis codes can be attached to a PCM. On system installation, the codes are simply labelled PCM_Analysis1 - PCM_Analysis6 and they do not display in this menu node. Your Tourplan Administrator would have identified and defined Analysis fields inline with your companys requirements.

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

NOTE: Analysis codes are not required for creating a PCM, but they are needed when analysing and reporting on your PCMs later and are typically setup by your System Administrator when other codes are created.

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CHAPTER 2

Setting up Group Scheduled Tours

This chapter covers Group Scheduled Tours, which are tours undertaken by groups of people on a regular basis, whereby a schedule of departure dates is published for booking against.

The tours comprise a number of products packaged together into a Pre-Costed Module, or PCM, which has a fixed selling price and can be booked and paid for as a single item.

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Group Scheduled Tours Overview

There are two key points regarding Group Scheduled/Series Tours:

- First, they are scheduled; i.e. they have set departure dates (typically published in a brochure), and
- second, bookings for these tours are received in the form of FIT bookings and each tour departure is then operated (in terms of supplier correspondence) as a group tour, with all of the FIT bookings for that departure 'Rolled Up' on the Group Tour.

There are four setup steps to create scheduled group tours:

1. Create a PCM with all of the products that are in the scheduled group tour.
2. Create a special Product Database product ('Package Price Product') that holds the selling prices for the scheduled group tour.
3. Attach the Package Price Product to the PCM.
4. Set the tour departure dates.

Component Tours

NOTE: "Component" package tours; i.e. those tours that are made up of two more 'component' tours, which can be sold as tours in their own right. Detail on setting up Component Tours is available from the local Tourplan office.

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Step 1 - Create The Scheduled Series PCM

The process of setting up the PCM with the Package Tour products in it is exactly the same as for creating a standard *Non-Package Quote* or *Module PCM*. The example Package being used is an 8-day tour with coach travel, accommodation and some sightseeing. The PCM has not had any markups applied since it is only being used to:

- Store the products in the package, along with the cost prices.
- Hold the detail of the package price product and the rules surrounding the package.

The selling price(s) of the package are in the Package Price Product, which is created and attached to the PCM.

The process of creating a Scheduled Series PCM is split into two tasks in this topic:

1. "Create a New PCM Header and Pax Ranges" below
2. "Add Service Lines to a PCM and Adjust Rates" on page 23

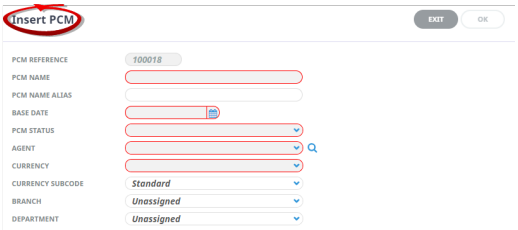
Create a New PCM Header and Pax Ranges

1. From the Home menu, select **Home > Products > PCM Package Setup**.

   NOTE: You can also get to the PCM Quotes screen via menu *Home* > *Bookings and Quotes* > *PCM Quotes*.

2. Click **Insert New PCM**.

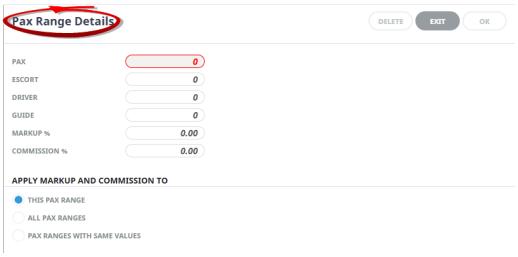
3. On the empty **Insert PCM** screen, give this PCM a name and enter data into other fields as required.

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

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

6. If you click **OK**, the PCM is created and the empty **Pax Range Details** screen is displayed.

7. Enter values **for the first pax range** into fields as required and click **OK**.

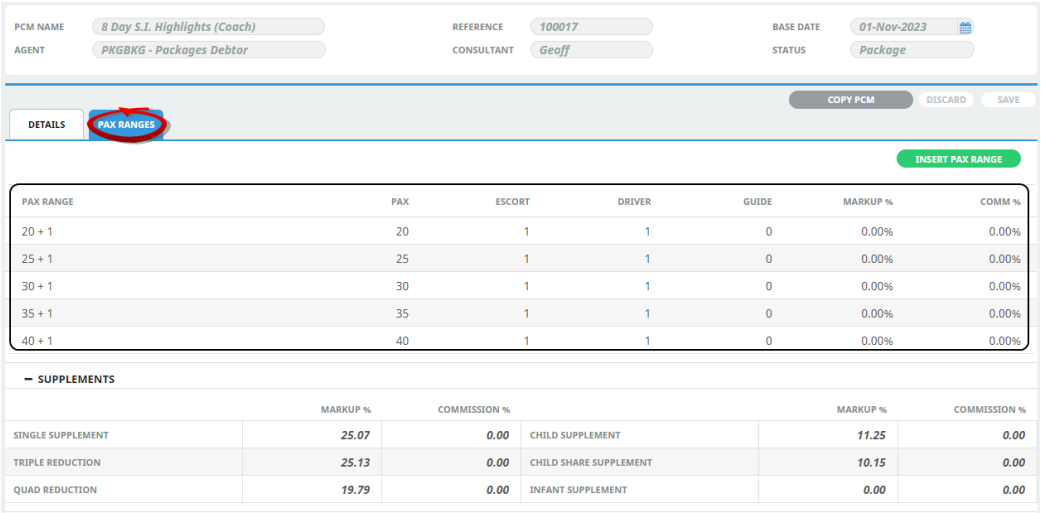
Pax Range Details

When you click **OK**, the fields are cleared and the empty Pax Range Details screen as shown above is displayed again, *with no indication that the previous values entered have been accepted*. However, they were accepted, and any subsequent pax ranges you enter will behave in the same way and also be accepted.

Any number of pax ranges can be entered. A typical setup might be five or six pax ranges, covering (for example) 10, 15, 20, 25 and 30 pax, with one or two escorts for each pax range (an escort might also be a driver). In each case, enter values for Pax, followed by values for Escort, Driver and Guide if required. You can also enter Markup % / Commission % if theses are known.

NOTE: An entry for Drivers is only required here if the system is to cost the driver. If the driver's costs, including accommodation and meals, are covered by (for example) the quotation from a transportation company, then no driver entry is required here.

8. When you are finished entering pax ranges, click **Exit** (on the Pax Range Details screen) to display the **PCM Details (Pax Ranges tab)**, where you can see all the pax ranges entered.



NOTE: You can get to this view of an existing PCM any time via menu **Product > PCM Packages > PCM Details > General Setup > Pax Ranges** tab.

9. Click **Save** to save all entered pax ranges.

10. Insert additional pax ranges via the **Insert Pax Range** button.

NOTE: When outputting documentation, up to ***6*** Pax ranges/prices can fit on an A4/Letter page in portrait orientation and up to ***10*** Pax ranges/prices in Landscape orientation.

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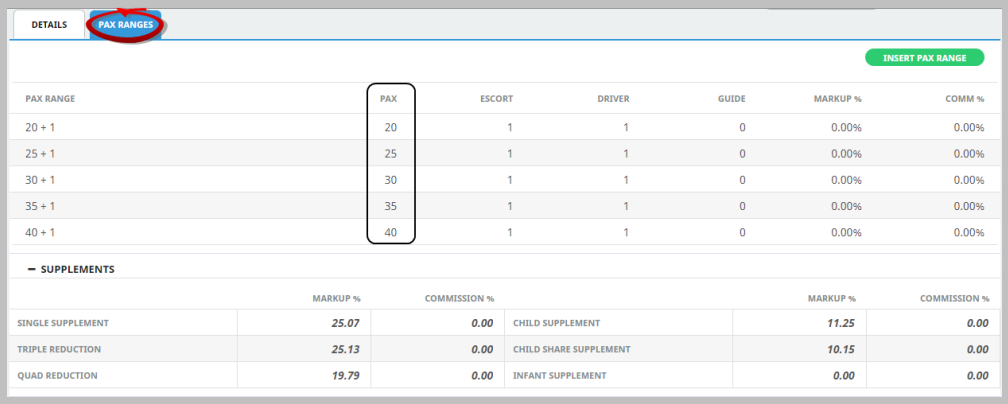
Once a PCM is created, the PCM Details, General Setup screen is displayed, comprising two tabs:

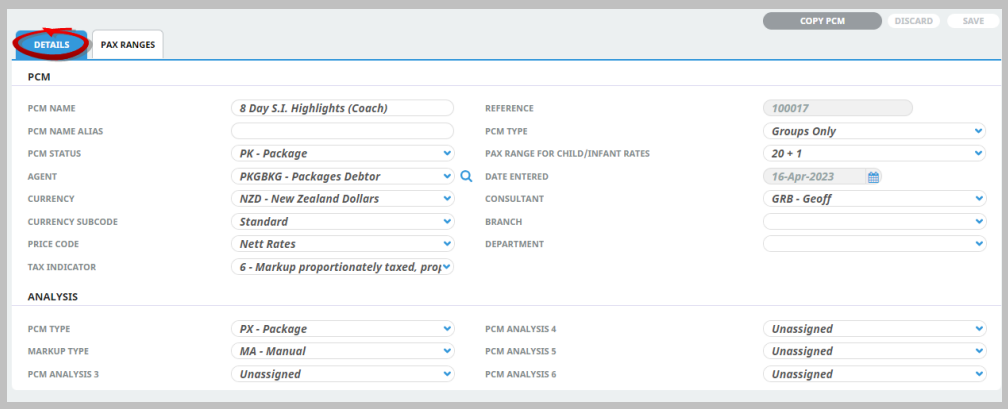
- **Pax Ranges** (showing five ranges in this example)



PAX RANGE	PAX	ESCORT	DRIVER	GUIDE	MARKUP %	COMM %
20 + 1	20	1	1	0	0.00%	0.00%
25 + 1	25	1	1	0	0.00%	0.00%
30 + 1	30	1	1	0	0.00%	0.00%
35 + 1	35	1	1	0	0.00%	0.00%
40 + 1	40	1	1	0	0.00%	0.00%

	MARKUP %	COMMISSION %		MARKUP %	COMMISSION %
SINGLE SUPPLEMENT	25.07	0.00	CHILD SUPPLEMENT	11.25	0.00
TRIPLE REDUCTION	25.13	0.00	CHILD SHARE SUPPLEMENT	10.15	0.00
QUAD REDUCTION	19.79	0.00	INFANT SUPPLEMENT	0.00	0.00

- **Details**

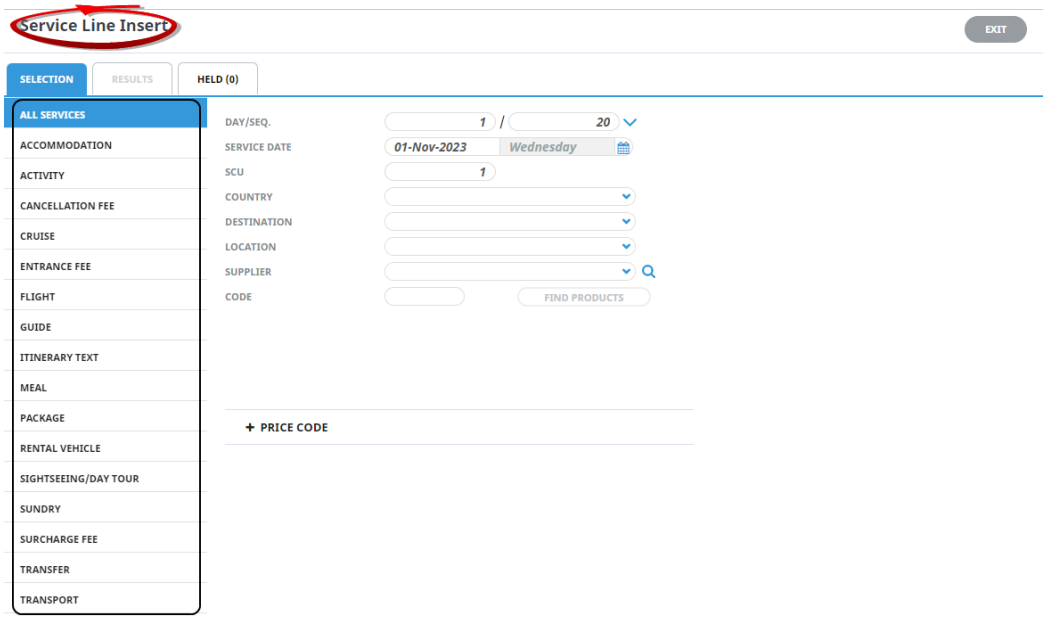


The PCM now exists, but it is currently empty; i.e. it has no products (also known as Service Lines) attached. The following procedure adds nine service lines to the example PCM.

Add Service Lines to a PCM and Adjust Rates

1. Select menu option **PCM Package Setup > Itinerary**.

2. On the **Service Line Insert** screen, enter enough information to be able to quickly find the product to be added as a service line to this PCM.



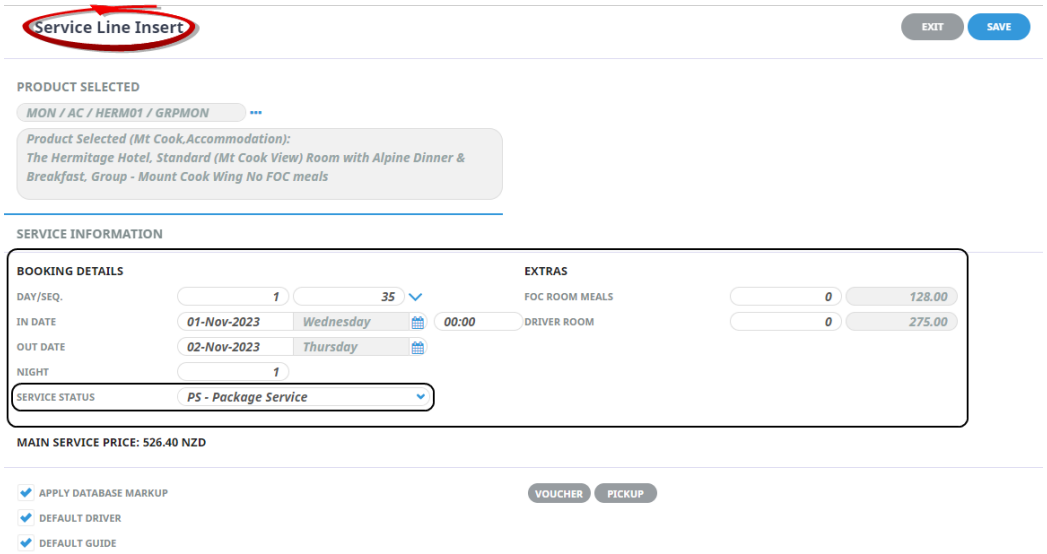
NOTE: The easiest way is to select products using the Service Type (*Accommodation, Activity, Cruise, Entrance Fee* etc.) and also *Supplier* and (product) *Code*, if known.

3. Click **Find Products** and locate the product in the list of products returned.

4. Click **Book** to review the information for this service line.

   a. To select the product to hold, click **Hold**.

5. Check all details under **Service Information** and update any required.



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The examples show a Status of **PS - Package Service**, which is not a service status in the standard Product Database, however, this doesn't matter, as long as it's a status that the users understand.

It defaults to the value set in the Code Setup INI Setting *PCM_SERVICE_IT_STATUS*.

Service statuses do not mean much in PCMs. Unlike bookings, where the service status can dictate such things as whether vouchers can be issued or allocation held, in PCMs these functions are not available – after all, a PCM is either a 'Quote' or a repository of services used as a Package, or a Master that can be copied into bookings.

The main use of service statuses in PCMs is to determine whether a service is to be included in the cost, or is an 'Optional' (i.e. Alternate) service.

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

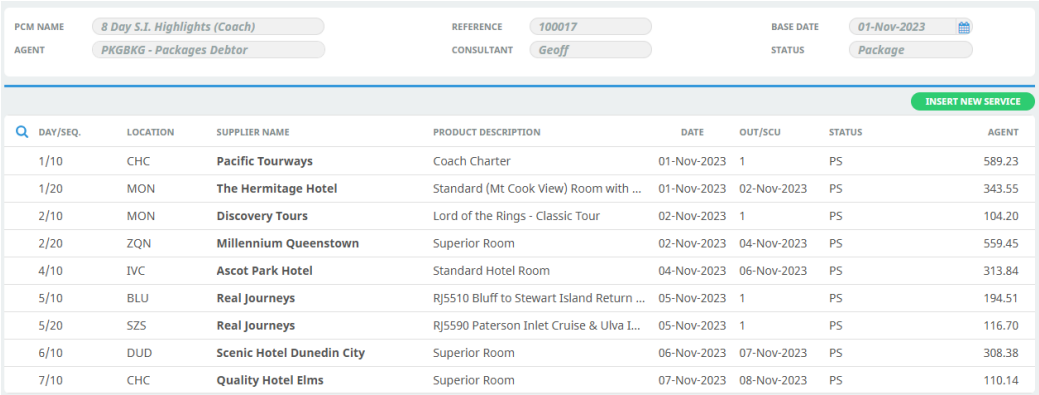
7. Click **Exit** to discard any changes.
8. If you click Save and the product requires rates to be loaded manually, the **Service rate requires manual pricing entry** screen appears automatically, showing a line for each pax range entered.

   NOTE: If you know the rates, enter them at this time and click **Save**. If you don't know the rates, they can be entered later, in which case you also click Save.

9. When you click Save, the system displays the PCM Packages, Itinerary view, showing one service line entered. Click **Insert New Service** to add the next service line.

   INSERT NEW SERVICE

10. Continue adding service lines until all required products are attached to the PCM. The **example PCM** now comprises nine products. This is the completed itinerary for the PCM and can be viewed at any time via menu **PCM Packages > Itinerary**.



PCM NAME	8 Day S.I. Highlights (Coach)	REFERENCE	100017	BASE DATE	01-Nov-2023
AGENT	PKGBKG - Packages Debtor	CONSULTANT	Geoff	STATUS	Package

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	CHC	**Pacific Tourways**	Coach Charter	01-Nov-2023	1	PS	589.23
1/20	MON	**The Hermitage Hotel**	Standard (Mt Cook View) Room with ...	01-Nov-2023	02-Nov-2023	PS	343.55
2/10	MON	**Discovery Tours**	Lord of the Rings - Classic Tour	02-Nov-2023	1	PS	104.20
2/20	ZQN	**Millennium Queenstown**	Superior Room	02-Nov-2023	04-Nov-2023	PS	559.45
4/10	IVC	**Ascot Park Hotel**	Standard Hotel Room	04-Nov-2023	06-Nov-2023	PS	313.84
5/10	BLU	**Real Journeys**	RJ5510 Bluff to Stewart Island Return ...	05-Nov-2023	1	PS	194.51
5/20	SZS	**Real Journeys**	RJ5590 Paterson Inlet Cruise & Ulva I...	05-Nov-2023	1	PS	116.70
6/10	DUD	**Scenic Hotel Dunedin City**	Superior Room	06-Nov-2023	07-Nov-2023	PS	308.38
7/10	CHC	**Quality Hotel Elms**	Superior Room	07-Nov-2023	08-Nov-2023	PS	110.14

11. The PCM also has a **Dashboard** view, which can be selected at any time via menu **PCM Packages > Dashboard**.

PCM NAME	8 Day S.I. Highlights (Coach)	REFERENCE	100017	BASE DATE	01-Nov-2023
AGENT	PKGBKG - Packages Debtor	CONSULTANT	Geoff	STATUS	Package

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	20 + 1	25 + 1	30 + 1	35 + 1	40 + 1
VOUCHER COST	783.59	2,128.22	2,013.15	1,944.77	1,903.36	1,859.55
MARKUP %	25.07	24.05	23.94	23.87	23.89	25.03
MARKUP	196.41	511.78	481.85	464.23	454.64	465.46
RETAIL	980.00	2,640.00	2,495.00	2,409.00	2,358.00	2,325.00
COMMISSION %	0.00	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	0.00	0.00	0.00	0.00	0.00
AGENT	980.00	2,640.00	2,495.00	2,409.00	2,358.00	2,325.00
INCLUDES TAX	127.83	344.35	325.43	314.22	307.56	303.26
TOTAL	980.00	2,640.00	2,495.00	2,409.00	2,358.00	2,325.00
MARGIN %	20.04	19.39	19.31	19.27	19.28	20.02
MARGIN	196.41	511.78	481.85	464.23	454.64	465.46

Child/Infant Rates from Pax Range: 20 + 1

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Step 2 - Create Product Package Price

Use the Product application to set up the Package Price Product. There is no major difference in the way this is created when compared to any other product, however, there are some flags that need to be set for a package and these are indicated in the procedure steps.

Insert a Product (Package)

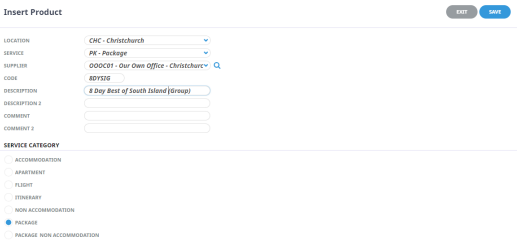
1. Select menu **Home > Products > Product Setup**.

2. Click **Create New Product**.

3. On the **Insert Product** screen, enter data into fields (the top three are drop-down selection fields - entries must already exist before you can select them).

   NOTE: For a package, select the service code to be used for PCM Package Products. The standard code is *PK - Package* which is included in the standard Product Database for a new system. Also select *Package* under Service Category.

4. Check the **completed screen** and make a note of the Code and Description entered (in this example, **8DYSIG** and **8 Day Best of South Island (Group)**.

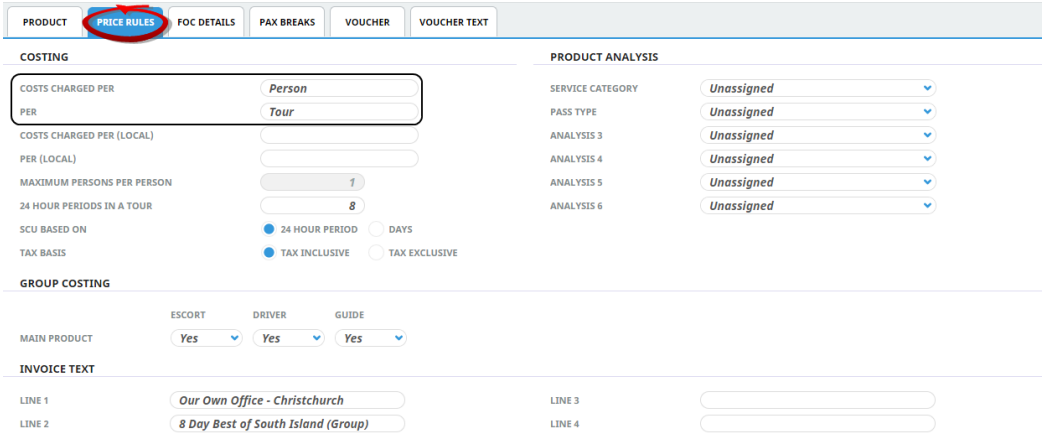
5. Click **Save** to keep the changes.

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

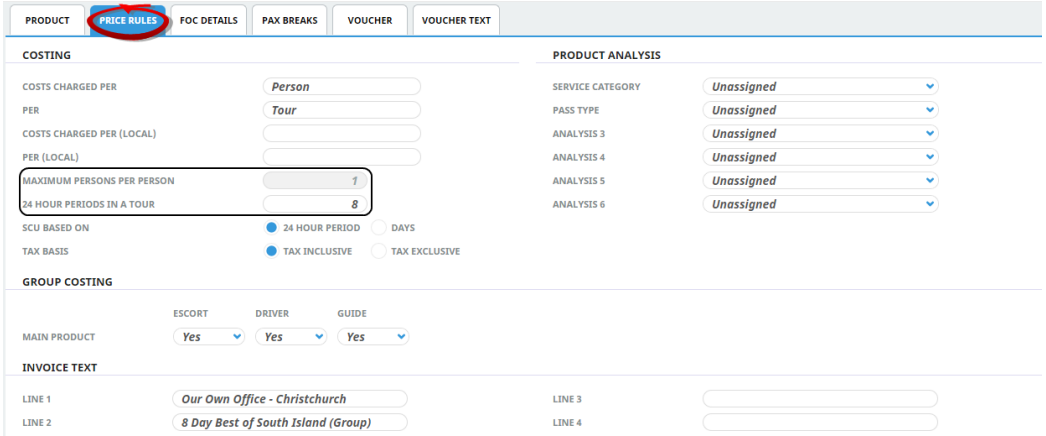
At this point the product exists, but there are no price rules or rates set.

Set PCM Price Rules and Rates

1. On the Product Setup screen, click tab **Price Rules** and set Costs Charged Per to **Person** and Per to **Tour**, as in the example.



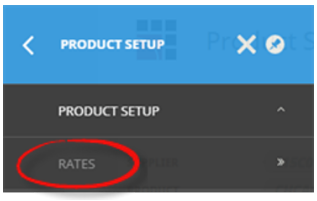
2. In the **How many 24 hour periods in a tour** field, insert the **number of nights** for this tour.



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

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

5. On the Product Setup screen, select menu **Product Setup > Rates**.



6. On the Product Setup screen, click **Insert** to add a new date range for this product.

7. On the Date Range screen, click the **Rates** tab to add rates to this product.

   NOTE: Make sure **Per Person** is selected under Show Rates.

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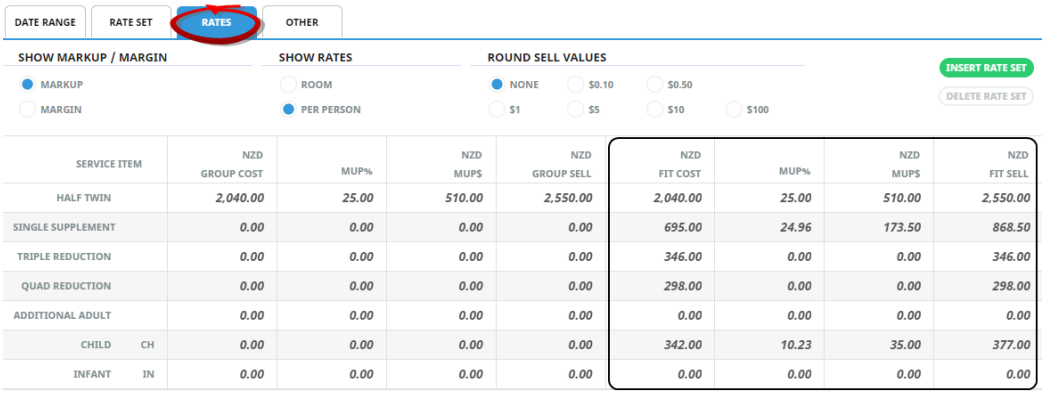


SERVICE ITEM	NZD GROUP COST	MUP%	NZD MUP$	NZD GROUP SELL	NZD FIT COST	MUP%	NZD MUP$	NZD FIT SELL
HALF TWIN	2,040.00	25.00	510.00	2,550.00	2,040.00	25.00	510.00	2,550.00
SINGLE SUPPLEMENT	0.00	0.00	0.00	0.00	695.00	24.96	173.50	868.50
TRIPLE REDUCTION	0.00	0.00	0.00	0.00	346.00	0.00	0.00	346.00
QUAD REDUCTION	0.00	0.00	0.00	0.00	298.00	0.00	0.00	298.00
ADDITIONAL ADULT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CHILD CH	0.00	0.00	0.00	0.00	342.00	10.23	35.00	377.00
INFANT IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

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

About the Rates Entered

The Group cost and sell prices for the tour are entered here. These rates will be used to cost and sell Group bookings for this tour via the Tourplan Groups module. The cost rate in this case is based on the pax range from the PCM, which is typically based on the minimum Pax number for a tour. This cost is then used in standard Tourplan operational and management reports.

When the booking is made, the system will obtain the correct cost prices from the database based on the departure date. The cost price here can be useful to get an indication of the margin.

NOTE: Depending on the way the business' markup strategy is being handled, there could be no markup attached at Product Database level at all. The Markup Matrix allows differing markups to be applied based on a combination of booking analysis codes, supplier codes etc, supplier analysis codes, agent codes, agent analysis codes etc.

Once the Package Service Product has been created, it is attached to the PCM and the rules governing the sale and use of the PCM are set (see "Step 3 - Attach the Package Price Product to the PCM" on the next page) .

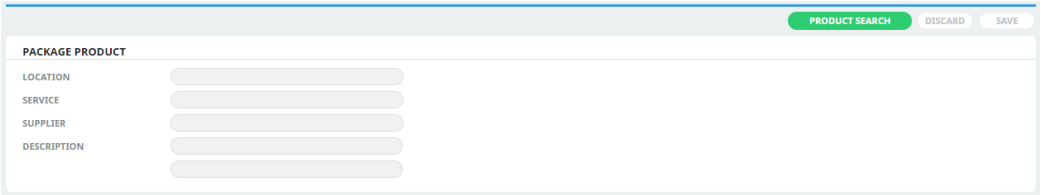
Step 3 - Attach the Package Price Product to the PCM

This step attaches the Package Price Product to a PCM, thereby creating a Package PCM.

Attach a Package Price Product to a PCM

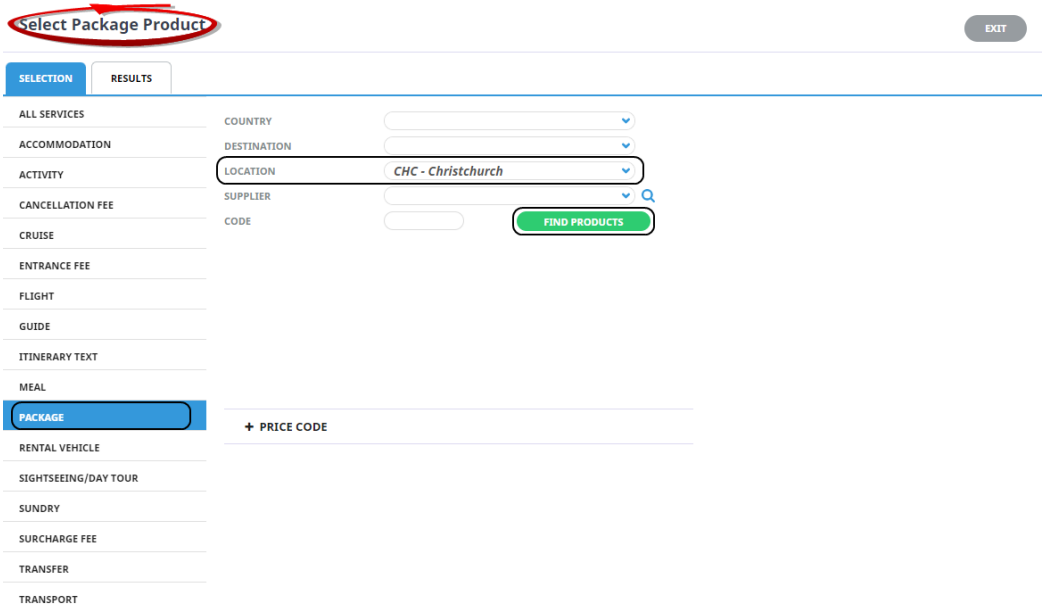
1. On the Product menu select **PCM Package Setup > Operation > Package Setup**.

2. The **Package Product** screen opens.

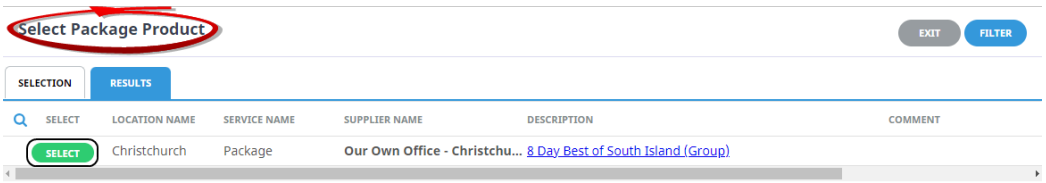


3. Click **Product Search** to find a package.

4. On the **Select Package Product** screen (Selection tab), select **Package** under All Services, select either Location or Supplier (or both) and click **Find Products**.



5. On the **Select Package Product** screen (Results tab), click the green Select button that matches your product.



6. On the **PCM Package Product** screen, note the default check-box selections under each of the section headings.

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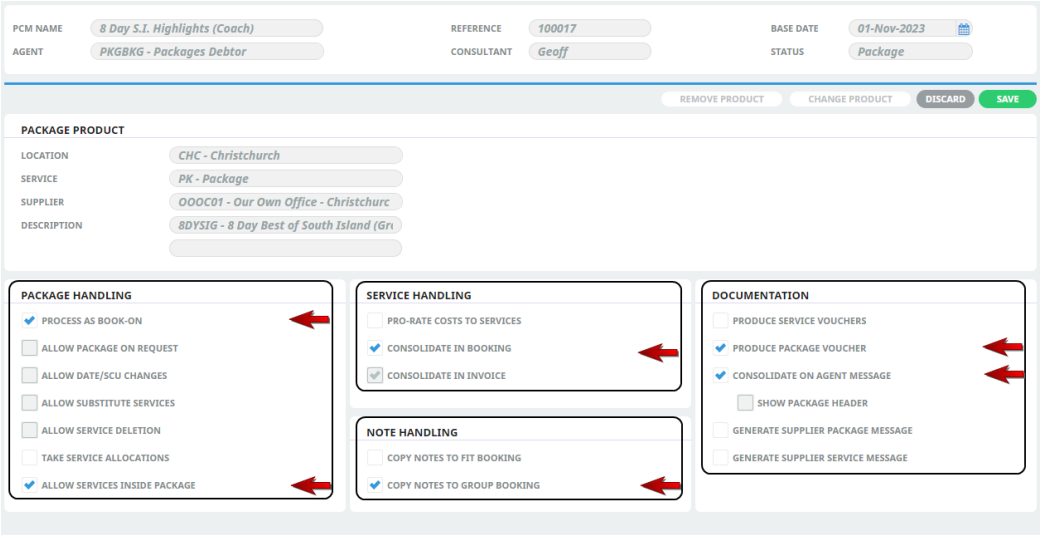
7. Change the default selections according to the descriptions given in "About the PCM Package Fields and Selections" below.

   The **8 Day S.I. Highlights (Coach)** example shows one set of selections - you may need to choose other options for your PCM Package.



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

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

About the PCM Package Fields and Selections

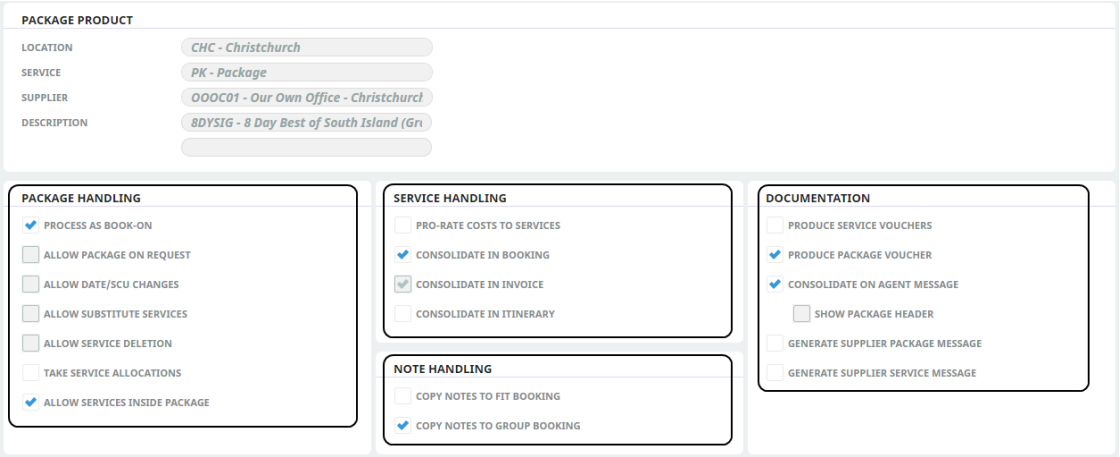
Package Handling section

The check boxes in this section of the screen determine how bookings for this Package will be processed:

- As FIT bookings to be later 'Rolled-up' (i.e. Booked-On) to group bookings for each departure date.
- What changes (if any) can be made to the PCM products at the time of entering the booking.
- Voucher production options.
- Service Handling in the Bookings, Invoicing and Itinerary production.
- PCM Products messaging options.

The example Package Handling screen in the procedure above shows typical settings for a Group Scheduled Tour. Those selections that are dimmed out are not available in conjunction with Group Scheduled Tours.

Process as Book-On



This should be checked to allow FIT bookings for the Package Product to later be rolled-up into group bookings by departure date. There is an automated process to do this which is detailed in the Operations User Manual.

NOTE: When this box is checked, several of the subsequent Package Handling options are 'dimmed-out' and become unavailable. This is because they are not valid for Book On/Group Tour Packages.

Take Service Allocations

Checking this box will automatically take inventory from allocations (where available), as each FIT booking is made on the Tour. For example, if the PCM contains an accommodation service, which has allocation available for the date(s) being booked, then it will be taken.

NOTE: For Scheduled Group Tours, standard allocations would probably not be used in this way. If services have been pre-booked for all series departures, then this flag should be unchecked. Pax numbers can be controlled by the allocation attached to each departure date.

Allow Services Inside Package

Checking this box will allow extra Products to be added to a booking within the dates defined for the Package. For example, optional day tours may be offered that are not included in the package.

This question does *not* apply to products added to a FITs service list before the start and after the end dates of a Package; e.g. pre and post accommodation.

Service Handling section

Pro-rate Costs To Services

For scheduled group tours, this box is normally left unchecked, which means the package price displays as the package total, not the costs of the individual products.

Consolidate In Booking

Checking this box (the typical setting for scheduled tours) will display the package as one service line in the booking and to view the package components, click on that service line.

Leaving this box unchecked will display the package first, with the component services listed below.

Consolidate In Invoice

If the previous Pro-rate Costs to Services box is left unchecked, this box is checked and dimmed-out. This is because when the costs for a package are consolidated in a booking, it is not possible to then invoice the booking to the agent on a service-by-service (i.e. component) basis. Any products added to the booking that are external to the package (either within the days of the package as additional services or outside of the package) will display as separate lines on the invoice.

Note Handling section

Copy Notes To Group Booking

If this box is checked, any notes that are attached to the PCM will be copied into the Group Booking (Master) as it is created.

Documentation section

Produce Service Vouchers

This box is NOT normally checked for Group Scheduled Tours.

Produce Package Voucher

Checking this box will produce one Package voucher for each booking entered in the Tourplan module (basically a 'ticket' for the passengers to join the tour).

Consolidate On Agent Message

Checking this box outputs just the package product on Agent messages; e.g. a booking confirmation message.

Generate Supplier Package Message

Checking this box enables message(s) to be sent to the supplier attached to the package product. This is generally internal, so there is no real need to have this checked. If a specific department in the company is responsible for operating the packages, then this box can be checked so that messages can be sent to that department.

Generate Supplier Service Message

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For scheduled tours, this must be left unchecked because supplier messages will be generated and sent from the Groups ‘rolled-up’ group booking for each departure, rather than from the FIT bookings.

Step 4 - Set the Tour Departure Dates

This step is done in the Product Database Allocations application. For more information on setting up allocations, refer to the Product User Manual.

Set Tour Departure Dates for a Package

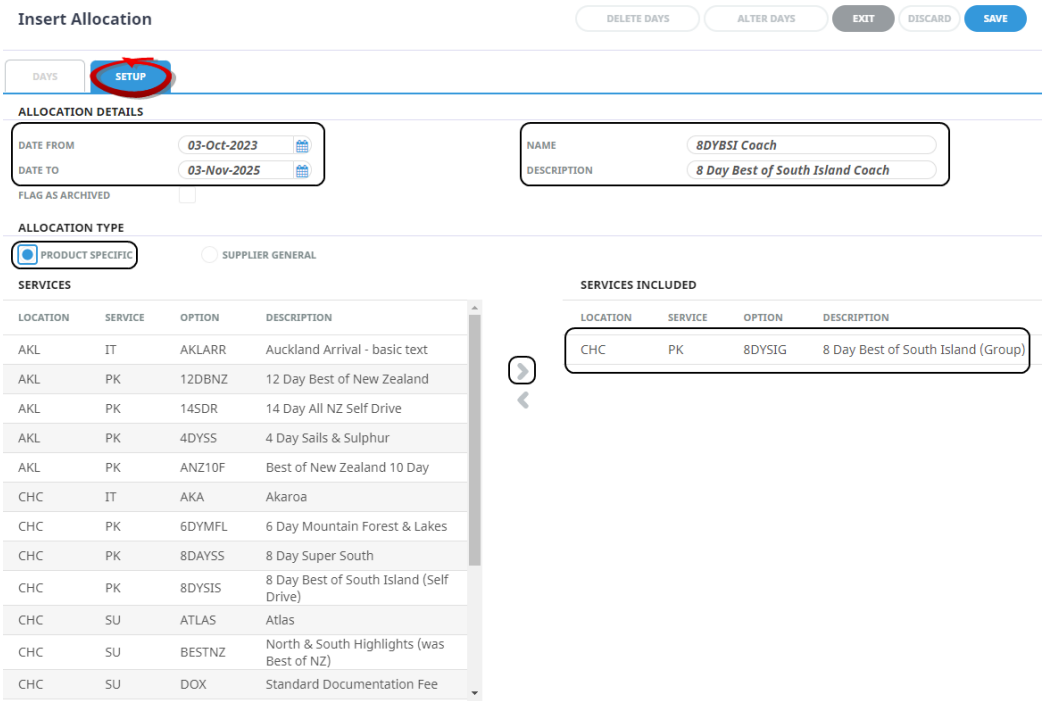
1. Search for and retrieve the product created in "Step 2 - Create Product Package Price " on page 27.

2. On the Product Setup screen, select menu **Product Setup > Supplier > Allocations**.

3. Click **Insert Allocation**.

   INSERT ALLOCATION

4. On the Insert Allocation screen **(Setup tab)**, do the following:
   - Set the From and To dates
   - Enter a Name and Description for this allocation
   - Make sure the Allocation Type selected is *Product Specific*
   - Scroll through the Services available until you find a match for services to include in this allocation - click the **right-hand arrowhead** to move the product under Services Included



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

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

7. If you click Save, the **Add Unit Type** screen displays automatically. Since the example is a Coach Tour, select *ST - Seat* in the drop-down Unit Type field. Also do the following:
   - Choose the departure days of the week for which this allocation applies (under Apply To)
   - Check all the Sub Allocations that will apply and set Max and Release values. In this example, the only sub allocation that applies is *GENERAL - General Allocation*.

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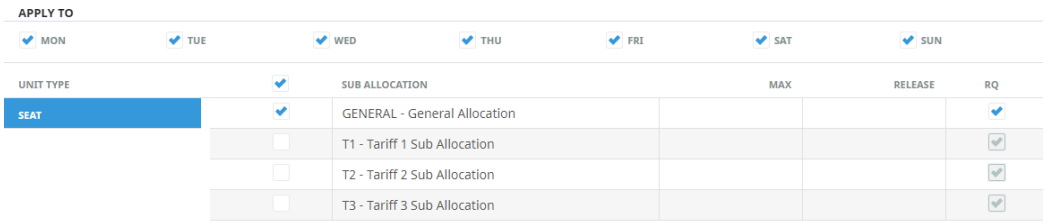
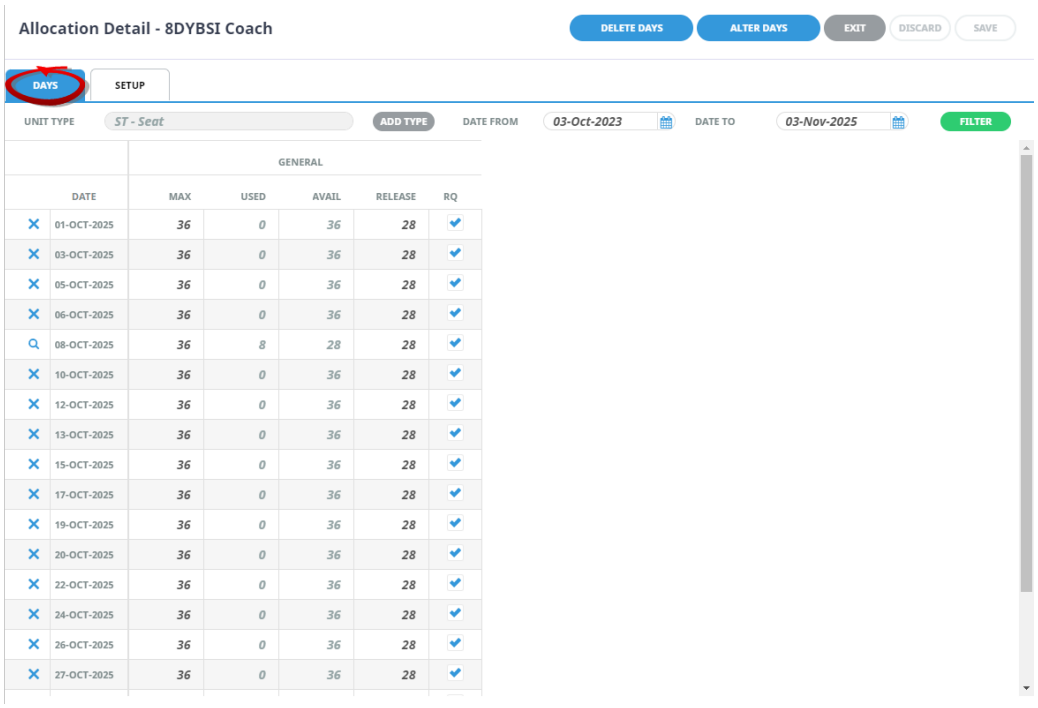


8. Click **Save** when done.

9. On the **Allocation Detail** screen, check that all departure days, quantities and allocation splits for the date range specified are accurate and complete.



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

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

In this example, the allocation has been set up on a product-specific basis against the Package Price Product with a PP-based unit of **ST - Seat**.

For the period displayed, there are departures on **Mondays**, **Wednesdays**, **Fridays** and **Saturdays**. Maximum seats has been set to **36** per departure and the release back period is **28** days.

NOTE: For information on operating Group Scheduled Tours, refer to the Operations User Manual and the Groups User Manual.

Allocation Maintenance

Within an Allocation, you can:

1. View and Edit Allocations and identify which bookings are using them on a day-by-day basis (see "View or Edit Existing Allocations" on the facing page).
2. Remove or attach products that can use the allocation (see "Remove or Attach Subscribing Products" on page 41).
3. Extend or add additional date(s) (see "Extending or Adding to Allocations" on page 42).
4. If the supplier advises close outs or unavailability, or changes to release periods, this function can be used to change the values (see "Change Allocation Quantities / Release Period" on page 43).
5. Move allocations and sub allocations (see "Move Allocations Between Allocations and Sub-Allocations" on page 44).
6. Remove one or more allocations (see "Delete Allocations" on page 45).

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Retrieving an Existing Allocation

All allocation functions are accessed from the list of allocations currently available from a supplier/product combination, so the first task is to retrieve a list of existing allocations.

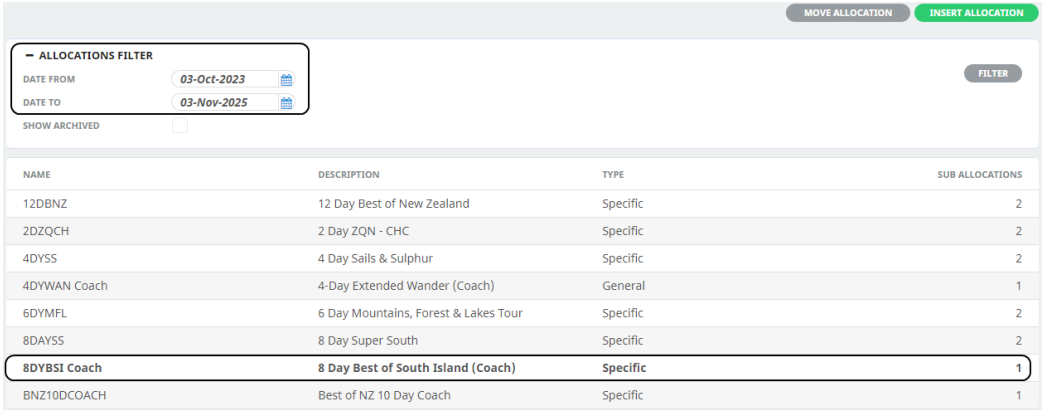
NOTE: More information about allocations and maintenance of allocations is covered in the Product User Manual - Allocations.

Retrieve an Allocation

1. Make sure at least one allocation exists for the supplier/product combination (see Adding a New Allocation).

2. From the **list of allocations**, click the one you want to work with to open it.

   NOTE: The most recently worked on allocation is highlighted allowing easy identification when maintaining allocations.



View or Edit Existing Allocations

1. "Retrieve an Allocation" above

2. Enter the affected date range in the Date From/Date To fields and click **Filter**.

   FILTER

   The records for the filtered dates will display or the default filter dates are set at *from* today's date *to* the same date next month.

3. Click on the Allocation to View.
4. The Allocation Detail screen with the Days Tab will open, view or edit the Max, Release and RQ columns, per Split Code, per day as in Adding a New Allocation.

   NOTE: If specific non-consecutive days need to have the values altered, this is the most practical way of doing it.

5. Check the **completed screen**.

6. Click **Exit** to discard any changes.
7. If changes were made to the allocation.

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

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

In addition, two buttons at the top of the screen allow a range of days to be Deleted or Altered.

NOTE: Individual dates can be deleted by clicking the **X** alongside each date within the days tab. Deletion confirmation is required.

Delete a Range of Dates

1. "Retrieve an Allocation" on the previous page

2. Enter the affected date range in the Date From/Date To fields and click **Filter**.

   FILTER

   The records for the filtered dates will display.

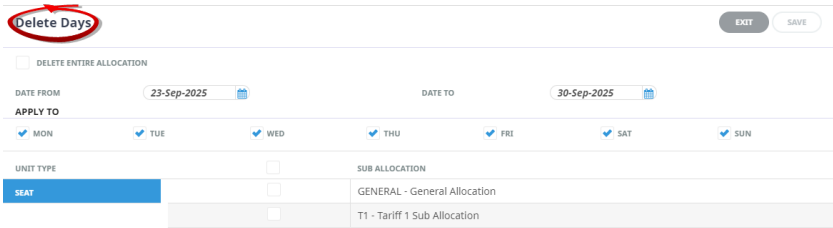
3. To delete the allocation for a particular day, click the blue **X** to the left of the Date column. Click as many lines as needed to delete a range of days.

   ✕

4. Alternatively, click **Delete Days** to specify a Date From and Date To range of days.

   DELETE DAYS

5. On the **Delete Days** screen, specify dates in the Date From and Date To fields, and make any other relevant selections in the Apply To and Sub-Allocation checkbox fields.



   The only fields that can be altered in this screen are the **From/To Dates**, **Day of Week** checkboxes and the **Sub-Allocation checkboxes** to select/de-select the days/Sub Allocations to be deleted.

   Two types of deletion can be done:

   a. Days can be deleted for all, or specific, days of the week; for all, or specific, sub allocations, within the filtered date range.
   b. The entire allocation can be deleted by checking the Delete Entire Allocation checkbox.

   > The Delete Entire Allocation checkbox ignores the dates selected and deletes the entire allocation. Allocations which have been used inside the deletion period dates are retained.

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

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

Alter a Range of Days

1. "Retrieve an Allocation" on the previous page

2. To Alter the range of days, click **Alter Days**.

   ALTER DAYS

3. On the **Alter Days** screen, specify dates in the Date From and Date To fields, and make any other relevant selections in the Apply To and Sub-Allocation checkbox fields.

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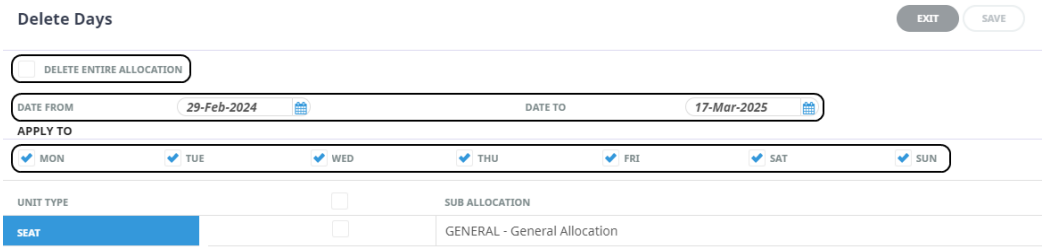


The fields that can be altered in this screen are:

- The From/To Dates
- Day of Week checkboxes
- The Sub-Allocation checkboxes (used to select/de-select the days/Sub Allocations to be deleted)
- Max, Release and RQ fields

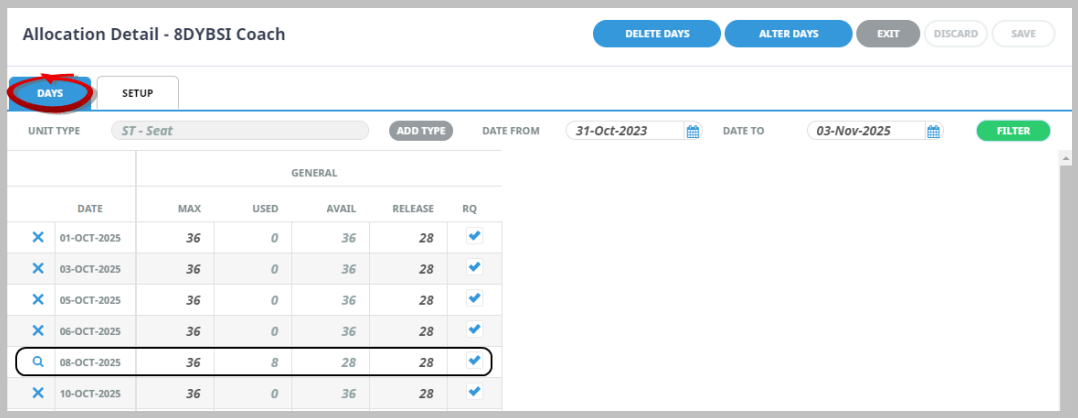
4. Click **Save** to keep the changes.

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

View Used Allocation Details

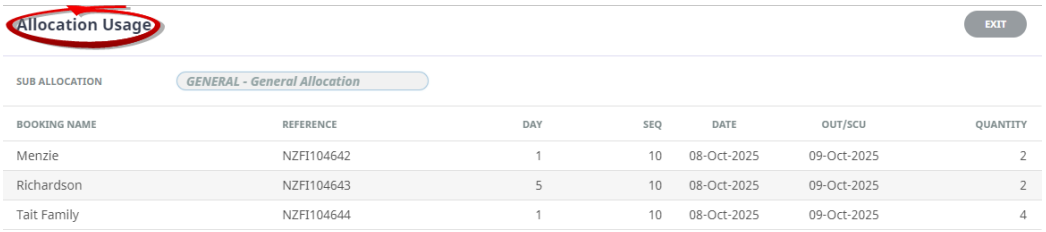
NOTE: Ensure the date that Bookings are to be viewed for is in the filtered range.

In the setup of the allocation for 8DYBSI Coach Allocation. The date of 08-OCT-2025 is highlighted to show the display of Used and Available seats etc. Seats have been taken from the allocation, and the three columns next to the date are the Max number of Seats, used Seats, and available number of Seats remaining.



1. Scroll to the required dates and click the **search icon** alongside the Allocation Date.

2. The Allocation Usage screen will display



The Booking Name, Reference, Day and Sequence of the service, together with the In Date and Quantity of units used are displayed.

NOTE: All data in this screen is view only and can not be edited. However, the booking reference can be copied and then pasted into a bookings application to retrieve the physical booking.

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Remove Attached Products

There may be instances where you need to remove an attached product, perhaps a particular room type is no longer available. Follow the procedure below to remove an attached product.

Remove or Attach Subscribing Products

1. To remove or add Products that are able to use the allocation, select the Allocation from the suppliers allocation list. See "Retrieve an Allocation" on page 37
2. The Allocation will open with the **Days tab** displaying.
3. Click the **Setup tab**.
4. The **Allocation Description**, **Allocation Type** and **Services Includedor excluded** can all be edited in this screen.

   If the Allocation Type is set to Product Specific and the type is changed to Supplier General, all products in the Services Included column will be removed.

5. To remove a product that is in the Services Included column, **highlight** it by clicking it and then click the **left arrow** ❮.

   NOTE: If a service is removed and no longer able to be used for the allocation, any existing allocations applying to that service will not be affected.

6. Click **Save** to keep the changes.
7. Click **Exit** to discard any changes.

Extending or Adding to Allocations

An Allocation can have it's dates extended. To do this, the 'Alter Days' function can be used.

NOTE: If allocations are offered on an annual basis, do not create a new allocation per year – simply extend the existing allocation.

Extend or Add to Allocations

1. Select the allocation to be extended and enter the dates it is to be extended From/To in the Date From/Date To fields and click the **Filter** button.

   FILTER

2. Click the **Alter Days** button.

   ALTER DAYS

The procedure for extending the allocation from this point on is exactly the same as setting up a new allocation. The Allocation Splits used in the original allocation default into the Alter Days screen.

Follow the steps shown in Adding a New Allocation.

NOTE: If the extended allocation does not appear in the scroll, check the Date From/Date To fields in the Allocation Header or Alter Dates screen to ensure that the newly extended dates are in the date range displayed.

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Change Allocation Quantities / Release Period

There are two methods of making changes to quantities:

1. Edit the cells individually.
2. Use the 'Alter Days' button.

Which method is used will depend on the scope of the changes required. If relatively minor changes are required – e.g., an occasional night closed out, then method 1 would probably be easier. If wholesale changes are required, then method 2 would be appropriate.

Example 1 – Edit Individual Cells

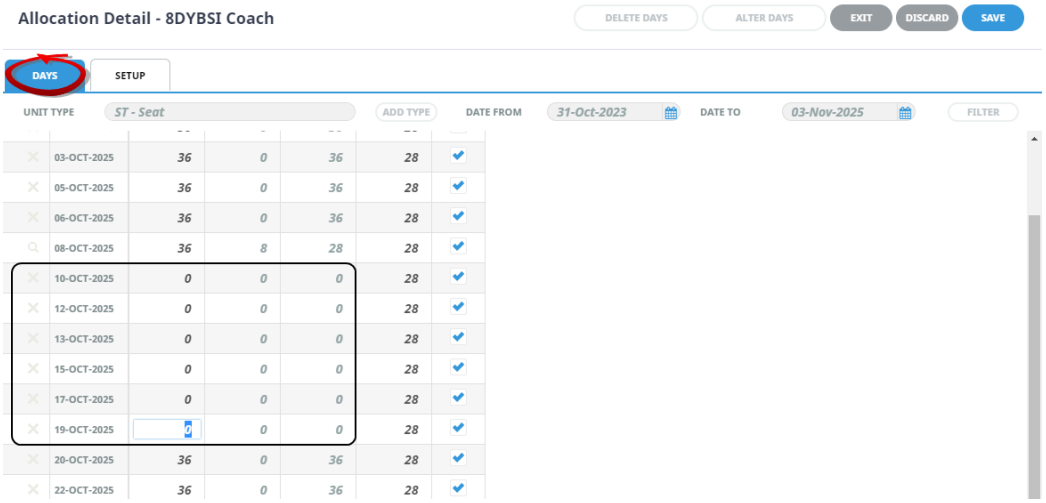
For the purposes of this example, the hotel has advised the allocation is closed out between 01 October and 20 October, and rooms will be available on request for some nights within that period.

There are two choices of method to achieve this:

a. Set the values in the cells to 0
b. Delete the lines for 01 October and 20 October

Method a. has been used and the allocation has been changed.

1. Edit the 'Max' fields so that all sub allocations will be 0.
2. The Release Days are set to 0 and the RQ checkboxes have been unchecked.



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

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

NOTE: The cells in the 'Total' column cannot be edited – only the sub-allocation cells are editable, and within those columns, only the 'Max' and 'Release' and 'RQ' cells can be edited. The Total column values do not update until the changes have been saved.

Delete Allocation by Individual Date

For method b. above, an individual allocation date can be deleted completely by clicking on the × button next to the date to be deleted.

NOTE: Dates can only be individually deleted - multiples can not be marked and then deleted. All sub allocations - GENERAL, T1, T2 etc are deleted for each date.

Move Allocations Between Allocations and Sub-Allocations

Again, there are 2 methods to do this.

NOTE: If only one allocation is set up on the system for a supplier with different Allocation Splits and a few individual days need to be moved around between sub allocations, then it is easier to reduce the amount on the sub-allocation and then increase the one being moved to. This is done by changing the Max column values in the split being taken from / given to. This is the same procedure as covered in Change Allocation Quantities / Release Period, "Example 1 – Edit Individual Cells" on the previous page.

1. To move more than one date at a time between Sub Allocations within the same allocation, use the 'Move Allocation' button.
2. To move numbers from one Allocation to another Allocation, click Move Allocation.

   NOTE: The same screen is used for both methods

   The exact number to be moved needs to be known – from which Allocation Split, to which Allocation Split. In the example, for the period 04/08 April, there are 6 rooms loaded against GENERAL Split (of which 4 have been used). The rooms being held against the T1, T2 & T3 splits, are going to be retained, because those rooms are likely to be used. 3 rooms are going to be moved from Small Grps QP allocation the FIT Allocation GENERAL split.

   NOTE: The system will not move rooms that it does not have. If one of the days in the date range specified if fully booked, no availability, then none will be transferred. Likewise selecting the 'All' checkbox will move all the available rooms for the dates selected.

   In the 'Move To' section, click in the row of the Allocation Name in the Move From section (Small Grps QP row) that the allocation is to be taken from and select the Allocation Name that the rooms are to be moved to (FIT Allocation). Click in the Sub-Allocation and Unit Type fields to reveal the drop downs and select Sub-Allocation name and Unit type to move to. Enter the quantity to be moved (or if it is All available to be moved, click the 'All' checkbox)

3. Click **Save** to keep the changes.
4. Click **Exit** to discard any changes.

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Delete Allocations

There are several methods to do this, depending on the deletion that is required:

1. Delete one Date only.
2. Delete a range of dates and/or Splits (Sub Allocations)
3. Delete the Allocation completely.
4. Archiving the Allocation

Example 1 – Delete Individual Date

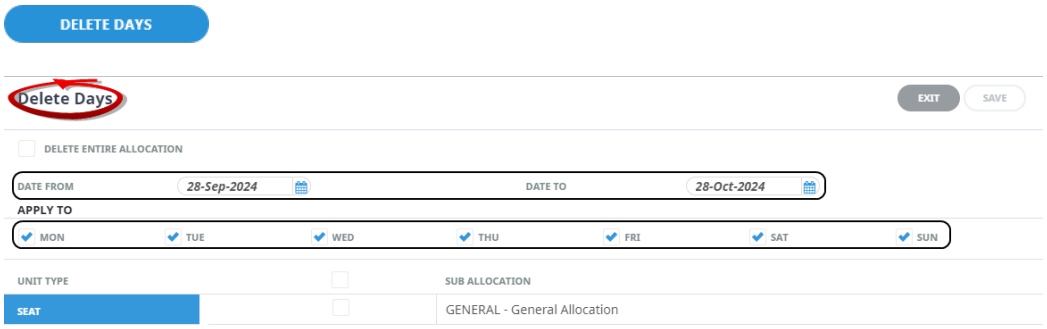
To delete one date only, click on the × on the left of the 'Date' column. Using this method will delete *all* Split Code (Sub Allocations) for the date selected.

Confirmation of deletion is required.

Example 2 – Delete Range of Dates and Sub Allocations

For the purposes of the example, the T2 and T3 Splits are to be deleted for the period 28 September - 28 October for everyday, to delete specific days unselect the required days of the week.

1. Set the date filters and click the Delete Days button.



2. Set the **Date From** and **Date To** fields as required.

   NOTE: If only specific days are to be deleted, uncheck the days that are *not* to be deleted.

3. Check the check-box(es) on the rows of the Sub-Allocation(s) to be deleted.

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

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

Example 3 – Delete Complete Allocation

1. Select **Delete Entire Allocation** check box.

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

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

NOTE: Only unused allocations will be deleted. Any dates where allocation has been used will remain. If the Unit Type still displays in the side bar after the deletion has completed, it means that there are used allocations for the unit type remaining. The date criteria may need to be widened to locate them.

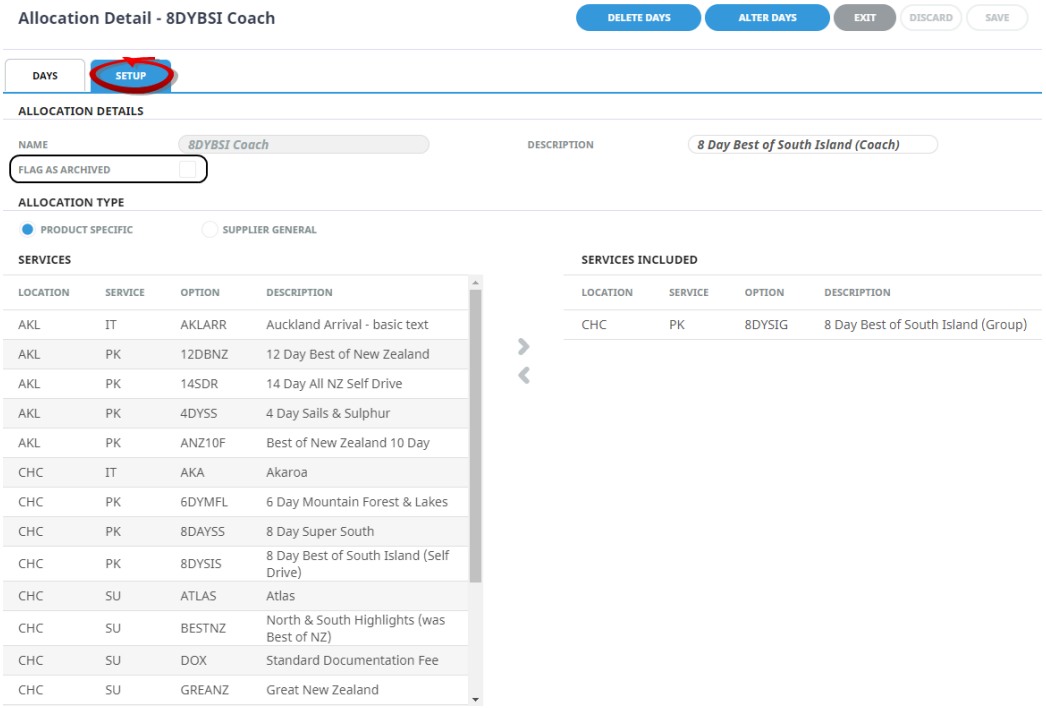
NOTE: This deletion process ignores any dates which may be in the Date From / Date To fields.

Archiving Allocations

This functionality allows existing allocations to remain in place, however the allocation will no longer be able to be sold in bookings. This function is the same as marking a product as deleted where any financial transactions will remain in place. The product allocation will not be able to be sold and existing sold allocations will be able to be viewed.

Archiving an Allocation

1. Open the **Allocation**.
2. Click on the **Setup Tab**.
3. Select the **Flag as Archived** check box.



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Price Analysis

This is the third of five tasks in this section of the user manual that describes miscellaneous functions under the *PCM Quotes* > *Operation* menu.

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

The full list is:

1. Package Setup
2. Documentation
3. "Price Analysis" above (this task)
4. Queue Entries
5. Contacts

Tourplan's Price Analysis functionality allows users to insert a date range for the system to analyse and identify any price differences within the dates specified. Users are then given the option to recalculate the PCM where price increases or decreases are visible for a selection of dates seen in the Pax Ranges and Supplements Tab.

PCM Package prices can be analysed prior to package product rates being attached. Follow the procedure below to set specific costs per date range.

Performing a PCM Price Analysis

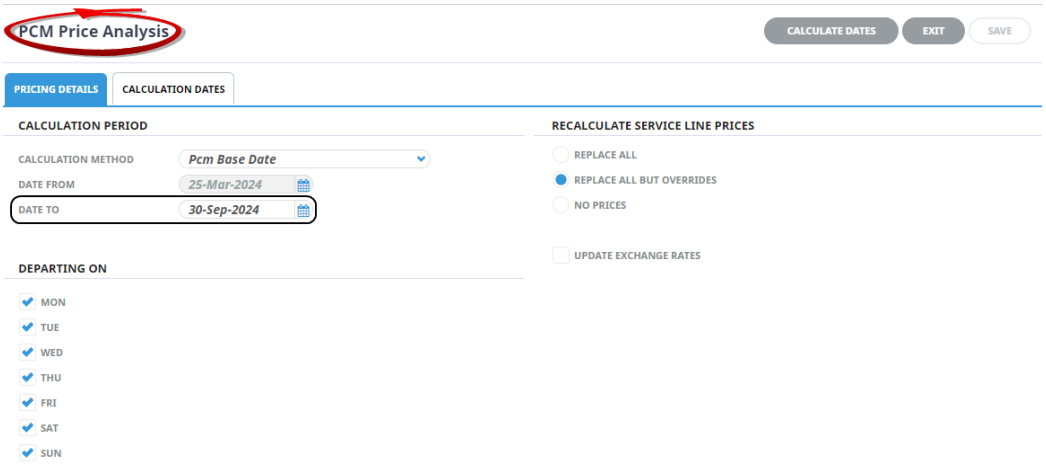
1. Search for and retrieve a PCM to work with. If you haven't done this already, see Retrieve an Existing PCM.

2. Select menu **PCM Quotes > Operation > Price Analysis**.

3. To analyse the costs for a range of dates, click **Analyse**.

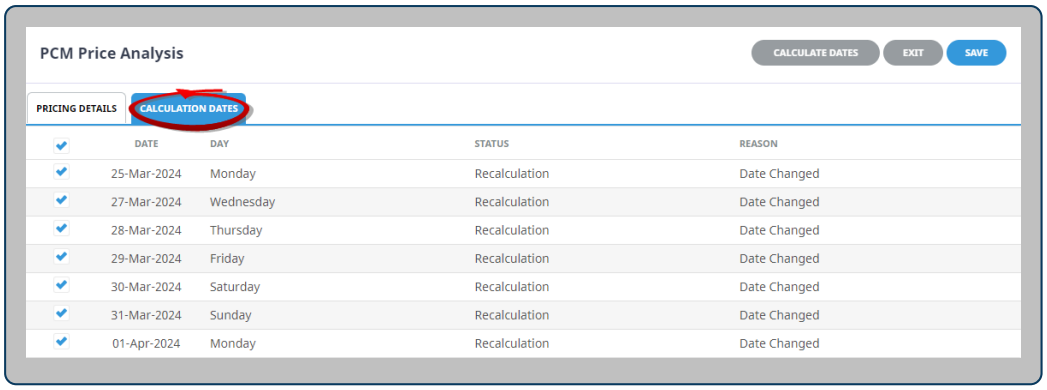
   ANALYSE

4. On the **PCM Price Analysis** screen, enter the *Date To* field and select how the system is to recalculate.



5. Click **Calculation Dates** tab or the **Calculation Dates** button to view available recalculation date options.

   RECALCULATE DATES



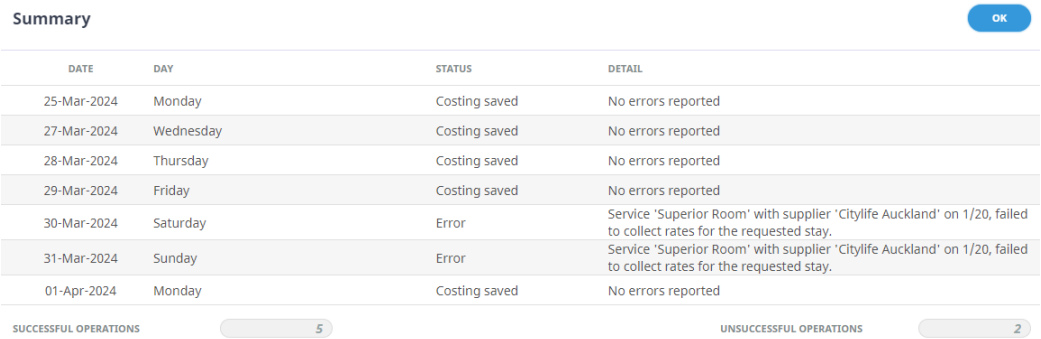
DATE	DAY	STATUS	REASON
25-Mar-2024	Monday	Recalculation	Date Changed
27-Mar-2024	Wednesday	Recalculation	Date Changed
28-Mar-2024	Thursday	Recalculation	Date Changed
29-Mar-2024	Friday	Recalculation	Date Changed
30-Mar-2024	Saturday	Recalculation	Date Changed
31-Mar-2024	Sunday	Recalculation	Date Changed
01-Apr-2024	Monday	Recalculation	Date Changed

6. 'Select all' is the default setting, all identified recalculation changes will be selected. Users can select specific dates to re-calculate if required.

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

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

   NOTE: A summary screen will display if **Save** is selected. The summary screen provides details of the recalculated dates, records any reported errors and the status of the PCM costings.



DATE	DAY	STATUS	DETAIL
25-Mar-2024	Monday	Costing saved	No errors reported
27-Mar-2024	Wednesday	Costing saved	No errors reported
28-Mar-2024	Thursday	Costing saved	No errors reported
29-Mar-2024	Friday	Costing saved	No errors reported
30-Mar-2024	Saturday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
31-Mar-2024	Sunday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
01-Apr-2024	Monday	Costing saved	No errors reported

SUCCESSFUL OPERATIONS 5 UNSUCCESSFUL OPERATIONS 2

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

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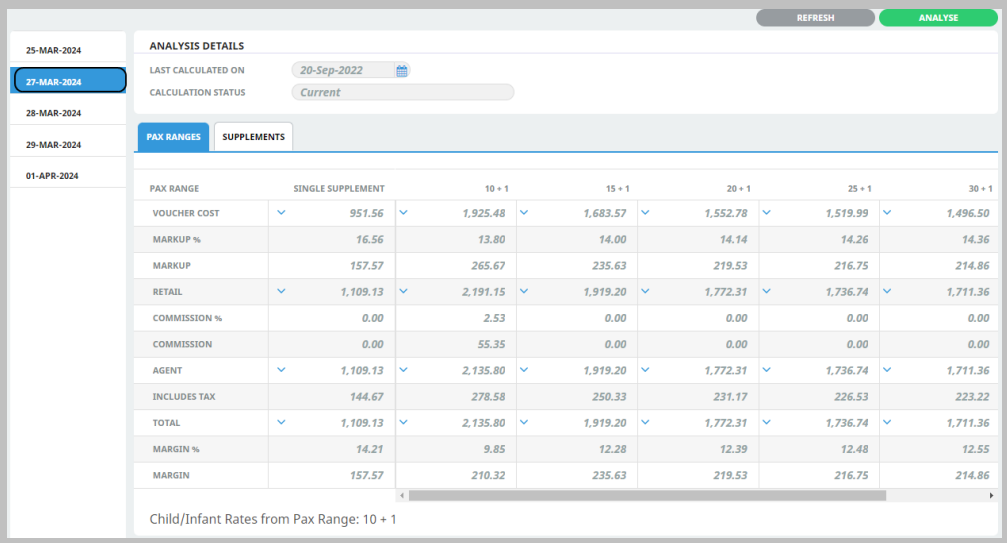
10. A list of date ranges will show to the left of the screen and values per pax range / supplement are available.

    NOTE: The up and down arrow indicates a price increase or decrease from the original PCM base date quotation.

You can see from this example: the 27th of March has a price decrease from the 25th March which was the original Base Date costing.



PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1
VOUCHER COST	951.56	1,925.48	1,683.57	1,552.78	1,519.99	1,496.50
MARKUP %	16.56	13.80	14.00	14.14	14.26	14.36
MARKUP	157.57	265.67	235.63	219.53	216.75	214.86
RETAIL	1,109.13	2,191.15	1,919.20	1,772.31	1,736.74	1,711.36
COMMISSION %	0.00	2.53	0.00	0.00	0.00	0.00
COMMISSION	0.00	55.35	0.00	0.00	0.00	0.00
AGENT	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
INCLUDES TAX	144.67	278.58	250.33	231.17	226.53	223.22
TOTAL	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
MARGIN %	14.21	9.85	12.28	12.39	12.48	12.55
MARGIN	157.57	210.32	235.63	219.53	216.75	214.86

About PCM Analysis Fields

Calculation Method

- Date Range - allows for a range of dates to recalculate the PCM based on the first date of the date range and will look for each difference from the product database to provide new values.
- PCM Base Date - will take the values on the PCM currently and then compare the first expected change in those values.

NOTE: In both cases a new set of values will be identified and the next expected date change will be compared to the previous date not to the original PCM values.

Date From/To

Dates or a range of dates for the Price Analysis function to retrieve values from the Product Database for each service in the PCM.

NOTE: If PCM Base Date is selected as the Calculation Method the Date From field will be disabled.

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 PCM values with any changes in exchange rates between service and PCM currencies.

Copy Bulk PCMs from Analysis

A PCM Quotes can be 'duplicated' to create multiple new PCM Quotes with updated Base Dates - using the Bulk Copy process from within the PCM Analysis Screen.

A 'Create PCMs' button is enabled if the Price Analysis identifies dates with different prices compared to the PCM Base Date.

Copy Bulk PCM Quotes from Analysis

1. Search for and retrieve a PCM to work with. If you haven't done this already, see Retrieve an Existing PCM.

2. Select menu **Product > PCM Quotes > Operation > Price Analysis**.

3. To analyse the costs for a range of dates, click **Analyse**.

   ANALYSE

4. **NOTE:** A summary screen will display if **Save** is selected. The summary screen provides details of the recalculated dates, records any reported errors and the status of the PCM costings.

   Summary OK

DATE	DAY	STATUS	DETAIL
25-Mar-2024	Monday	Costing saved	No errors reported
27-Mar-2024	Wednesday	Costing saved	No errors reported
28-Mar-2024	Thursday	Costing saved	No errors reported
29-Mar-2024	Friday	Costing saved	No errors reported
30-Mar-2024	Saturday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
31-Mar-2024	Sunday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
01-Apr-2024	Monday	Costing saved	No errors reported

SUCCESSFUL OPERATIONS 5 UNSUCCESSFUL OPERATIONS 2

5. Click **OK** to keep the changes and save or update the entry.
6. A list of date ranges will show to the left of the screen and values per pax range / supplement are available.

   NOTE: The up and down arrow indicates a price increase or decrease from the original PCM base date quotation.

You can see from this example: the 27th of March has a price decrease from the 25th March which was the original Base Date costing.

REFRESH ANALYSE

25-MAR-2024
27-MAR-2024
28-MAR-2024
29-MAR-2024
01-APR-2024

ANALYSIS DETAILS

LAST CALCULATED ON 20-Sep-2022
CALCULATION STATUS Current

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1
VOUCHER COST	951.56	1,925.48	1,683.57	1,552.78	1,519.99	1,496.50
MARKUP %	16.56	13.80	14.00	14.14	14.26	14.36
MARKUP	157.57	265.67	235.63	219.53	216.75	214.86
RETAIL	1,109.13	2,191.15	1,919.20	1,772.31	1,736.74	1,711.36
COMMISSION %	0.00	2.53	0.00	0.00	0.00	0.00
COMMISSION	0.00	55.35	0.00	0.00	0.00	0.00
AGENT	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
INCLUDES TAX	144.67	278.58	250.33	231.17	226.53	223.22
TOTAL	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
MARGIN %	14.21	9.85	12.28	12.39	12.48	12.55
MARGIN	157.57	210.32	235.63	219.53	216.75	214.86

Child/Infant Rates from Pax Range: 10 + 1

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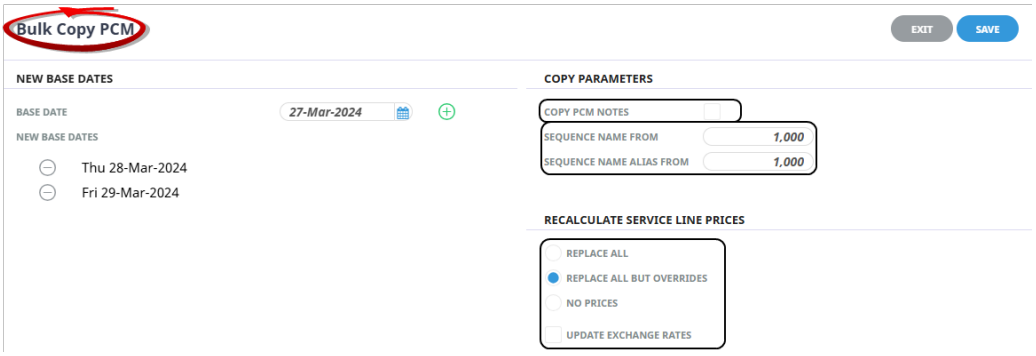
7. Click **Create PCMs**.

8. The **Bulk Copy PCM** screen opens with a list of New Base Dates copied from the Analysis Details screen. To copy the PCM notes, tick the **Copy PCM Notes** checkbox. Enter the **Sequence Name From** and **Sequence Name Alias From** values, and click the **Radio** button as to how the Service Line prices are to be recalculated.



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

10. A **Summary** of Successful Operations opens, listing the: PCM Base Date, Day, PCM Name (with Sequence numbers appended), New PCM Reference Number and a brief Summary Detail for each PCM created.

11. Click **OK** to keep the changes and save or update the entry.
12. To view copied PCMs, use the PCM search feature. The newly created PCMs will have a sequence number appended to the booking name. See Retrieve an Existing PCM.

About Bulk Copy PCM Fields

New Base Dates

Base Date

The Base Date displaying defaults from the first listed date from the Analysis Details screen, click the green plus button to include this entry as a New Base Date.

New Base Dates

A list of pre-defined base dates has transferred from the Analysis Details screen, each Base Date listed creates a new PCM in the Bulk Copy process, and the services will update in the PCM to match the New Base Date. If a New Base Date is not required, use the grey minus button to remove the date from the list.

Copy Parameters

Copy PCM Notes

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

Sequence Name From

When a new PCM is created from the copied PCM in a bulk copy process, all PCM details are copied including the PCM Name. This numerical setting is appended to the copied PCM, and when multiple PCMs are created the number will append sequentially starting with the value inserted here.

NOTE: If a PCM Name and sequence number already exist for a PCM, the system assigns the next available sequence number.

Sequence Name Alias From

When a new PCM is created from the copied PCM in a bulk copy process, all PCM details are copied including the PCM Alias Name. This numerical setting is appended to the copied PCM, and when multiple PCMs are created the number will append sequentially starting with the value inserted here.

NOTE: If a PCM Name Alias and sequence number already exist for a PCM, 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 PCM services are re-costed should Tourplan continue to use the previous exchange rates (unchecked) or use the exchange rates from the Tourplan Code Setup Module.

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Copy PCM Package

PCM Packages can be 'duplicated' to create multiple new sPCM Packages with updated Base Dates - using the Bulk Copy process.

Locate and open the original PCM Packages you wish to copy, then choose Bulk Copy from the Operations and Accounts menu.

Within the Bulk Copy screen, you can enter new base dates for each copied PCM Packages. A sequence number will be added to the PCM Name and PCM Alias Name to help distinguish the PCM from the newly created copies.

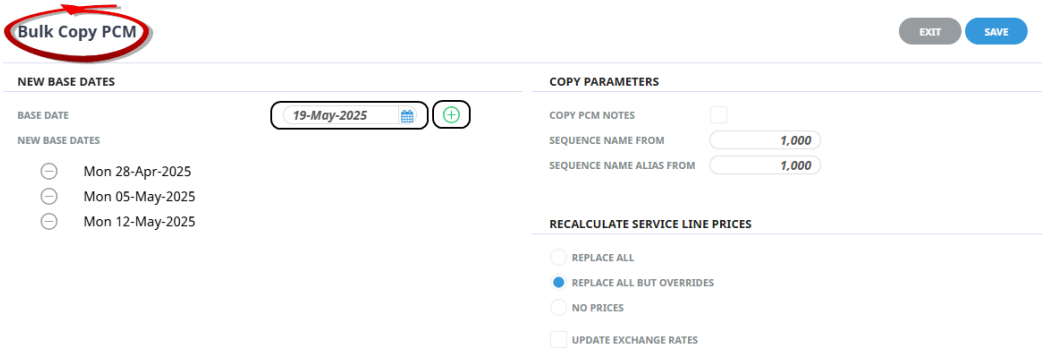
All details from the original PCM are copied, including the Agent and Branch/Department. You can choose whether to include the PCM Notes and decide how service line prices should be recalculated for the copied PCM s.

Bulk Copy PCM Package

1. Search for and retrieve a PCM to work with. If you haven't done this already, see Retrieve an Existing PCM.

2. Select menu **PCM Packages > Operations and Accounts > Bulk Copy**.

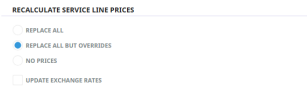
3. On the **Bulk Copy PCM** screen, add new **Base Date**s using the calendar selection, or manually entering a date, then select + to continue adding Base Dates.



4. Complete the **Copy Parameters**: To copy notes from the source PCM tick the **Copy PCM 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 to learn more.



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

7. Click **Exit** to discard any changes.
8. To view copied PCMs, use the PCM search feature. The newly created PCMs will have a sequence number appended to the booking name. See Retrieve an Existing PCM.

About the Bulk Copy PCM Fields

New Base Dates

Base Date

Enter or select a base date from the calendar selection, the green plus button is used to form a list of 'New Base Dates' below.

New Base Dates

Each Base Date listed will create a new PCM in the Bulk Copy process, and the services will update in the PCM to match the New Base Date.

Copy Parameters

Copy PCM Notes

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

Sequence Name From

When a new PCM is created from the copied PCM in a bulk copy process, all PCM details are copied including the PCM Name. This numerical setting is appended to the copied PCM, and when multiple PCMs are created the number will append sequentially starting with the value inserted here.

Sequence Name Alias From

When a new PCM is created from the copied PCM in a bulk copy process, all PCM details are copied including the PCM Alias Name. This numerical setting is appended to the copied PCM, and when multiple PCMs are created the number will append sequentially starting with the value inserted here.

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 PCM services are re-costed should Tourplan continue to use the previous exchange rates (unchecked) or use the exchange rates from the Tourplan Code Setup Module.

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CHAPTER 3

Setting up FIT Package Tours

A FIT Package is a package in which the passengers travel independently (scheduled transport, rental car etc.) and carry vouchers themselves for each product in the package. These can operate on a scheduled or daily basis.

As with Group Scheduled Tours, FIT Package Tours comprise a number of products packaged together into a Pre-Costed Module, or PCM, which has a fixed selling price and can be booked and paid for as a single item. There are, however, different choices available for FIT Package Tours so they are covered separately.

In this chapter ...

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Step 1 - Create the FIT Package PCM 57
Step 2 - Create the Product Package Price 63
Package Non-Accommodation 65
Step 3 - Attach the Package Price Product to the PCM 67
Service Substitution 70
Price Analysis 73
Copy Bulk PCMs from Analysis 76

FIT Package Tours Overview

Packaged FIT tours generally have NO set departure (i.e. start) dates. These tours may be as simple as, for example, a 3-day City stay-put, including only a hotel and transfers, or it can be an all-inclusive 14-day self-drive holiday.

The initial setup of this style of package tour is also done as a PCM. For FIT Packages, typically only one Pax Range based on 2 pax is required.

There are three setup steps required to create FIT Package Tours:

1. Create a PCM with all of the services that are in the FIT Package Tour.
2. Create a special Product Database service (‘Package Price Product’) which holds the selling prices for the FIT Package tour.
3. Attach the Package Price Product to the PCM.

Also, optionally:

4. Populate the Substitutions List in the PCM with substitutable services.

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Step 1 - Create the FIT Package PCM

The setting up of a PCM with the Package Tour services in it is exactly the same as has been discussed in this document for scheduled group tours. The example Package being used is an 8 Day Self Drive tour with rental car travel, accommodation and some included sightseeing. The PCM has not had any markups applied since it is only being used to:

- Store the services in the package, along with the cost prices.
- Hold the detail of the package price product and the rules surrounding the package.

The selling price(s) of the package are in the Package Price Product, which is created and attached to the PCM.

The process of creating a FIT Package PCM is split into two tasks in this topic:

1. "Create a New PCM Header and Pax Ranges" below
2. "Add Service Lines to a PCM" on page 60

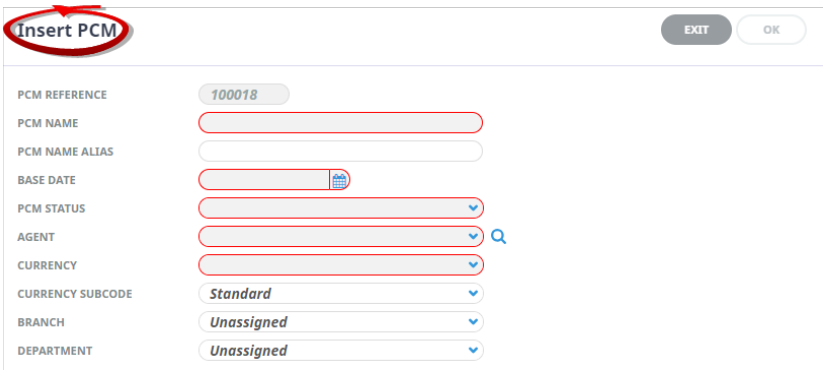
Create a New PCM Header and Pax Ranges

1. From the Home menu, select **Home > Products > PCM Package Setup**.

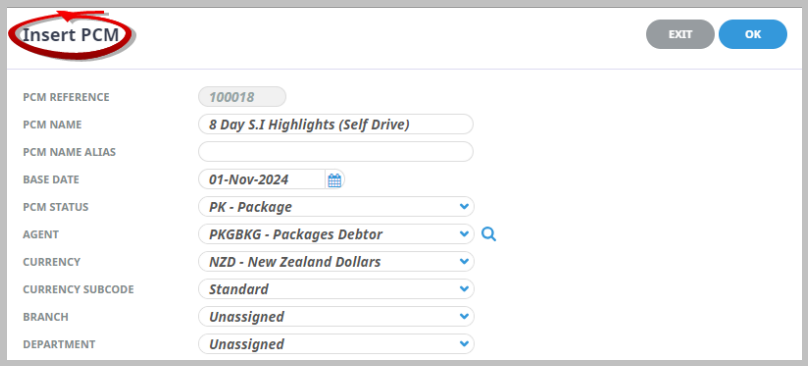
   NOTE: You can also get to the PCM Quotes screen via menu *Home > Bookings and Quotes > PCM Quotes*.

2. Click **Insert New PCM**.

3. On the empty **Insert PCM** screen, give this PCM a name and enter data into other fields as required.

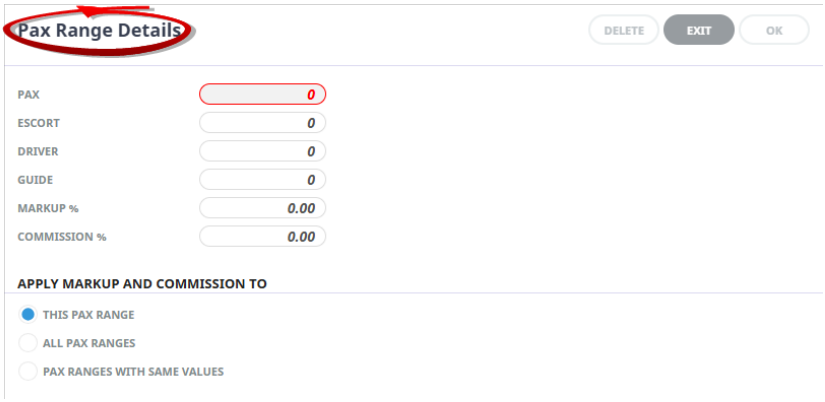
   This completed example shows a PCM header named **8 Day S.I. Highlights (Self Drive)**.

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

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

6. If you click **OK**, the PCM is created and the empty **Pax Range Details** screen is displayed.



7. Enter values *for the first pax range* into fields as required and click **OK**.

This example shows *Pax Range Details* for a pax range labelled *2 plus 0 drivers, guides or escorts* (this is the label given by Tourplan-NX when viewed in the PCM Details, General Setup screen (Pax Ranges tab).

Pax Range Details

When you click **OK**, the fields are cleared and the empty Pax Range Details screen as shown above is displayed again, *with no indication that the previous values entered have been accepted*. However, they were accepted, and any subsequent pax ranges you enter will behave in the same way and also be accepted.

NOTE: An entry for Drivers is only required here if the system is to cost the driver. If the driver's costs, including accommodation and meals, are covered by (for example) the quotation from a transportation company, then no driver entry is required here.

8. When you are finished entering pax ranges, click **Exit** (on the Pax Range Details screen) to display the **PCM Details (Pax Ranges tab)**, where you can see all the pax ranges entered.

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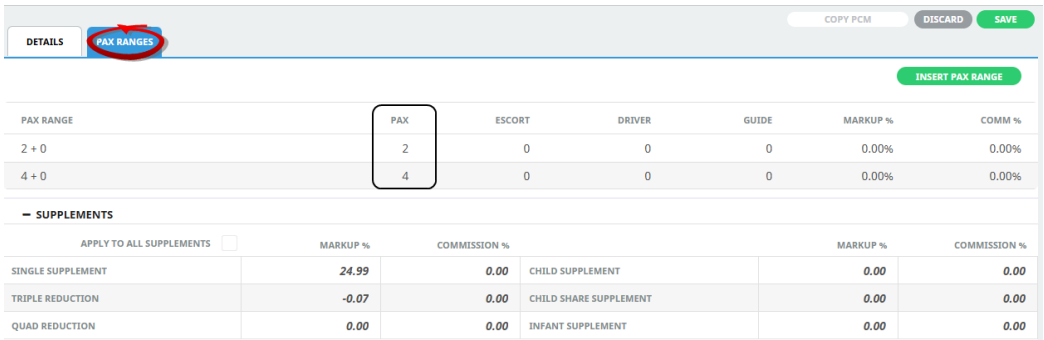


NOTE: You can get to this view of an existing PCM any time menu **PCM Quotes > PCM Details > General Setup > Pax Ranges** tab.

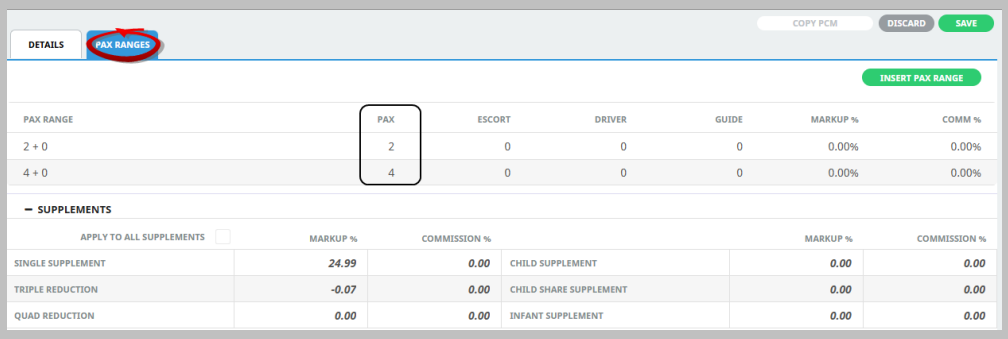
9. Click **Save** to save all entered pax ranges.

10. Insert additional pax ranges via the **Insert Pax Range** button.

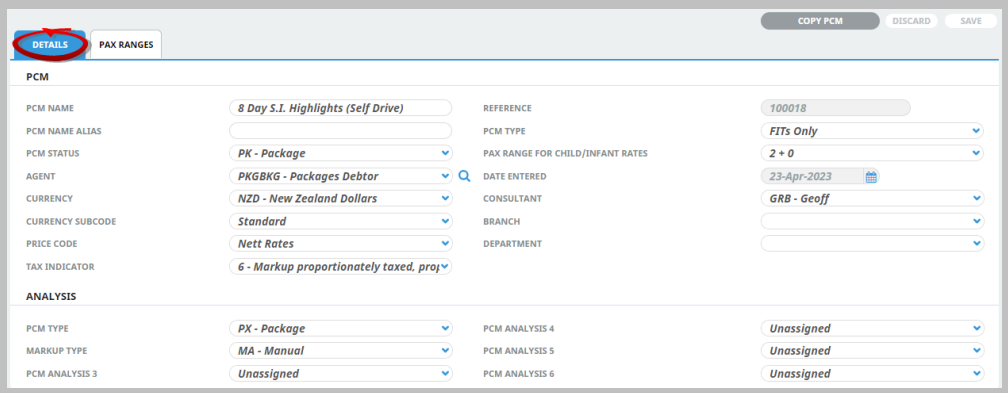
NOTE: When outputting documentation, up to 6 Pax ranges/prices can fit on an A4/letter page in portrait orientation and up to 10 Pax ranges/prices in landscape orientation.

Once a PCM is created, the PCM Details, General Setup screen is displayed, comprising two tabs:

» **Pax Ranges** (showing two ranges in this example)



» **Details**

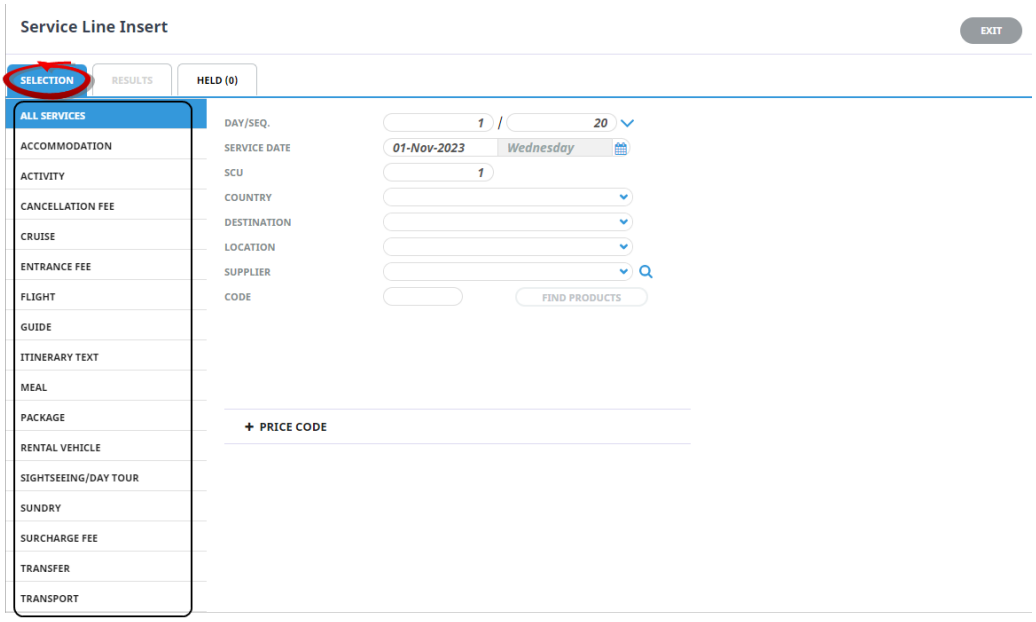


The PCM now exists, but it is currently empty; i.e. it has no products (also known as Service Lines) attached. The following procedure adds nine service lines to the example PCM.

Add Service Lines to a PCM

1. Select menu option **PCM Package Setup > Itinerary**.

2. On the **Service Line Insert** screen, enter enough information to be able to quickly find the product to be added as a service line to this PCM.



NOTE: The easiest way is to select products using the Service Type (*Accommodation, Activity, Cruise, Entrance Fee* etc.) and also *Supplier* and (product) *Code*, if known.

3. Click **Find Products** and locate the product in the list of products returned.

4. Click **Book** to review the information for this service line.

   a. To select the product to hold, click **Hold**.

5. Check all details under **Service Information** and update any required.

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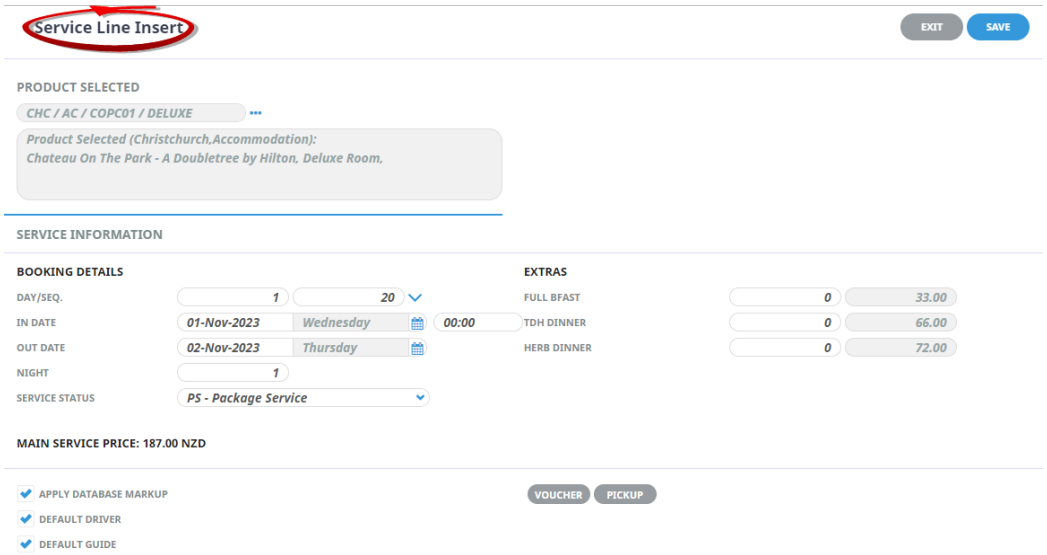

The examples show a Status of **PS - Package Service**, which is not a service status in the standard Product Database, however, this doesn't matter, as long as it's a status that the users understand.

It defaults to the value set in the Code Setup INI Setting *PCM_SERVICE_IT_STATUS*.

Service statuses do not mean much in PCMs. Unlike bookings, where the service status can dictate such things as whether vouchers can be issued or allocation held, in PCMs these functions are not available – after all, a PCM is either a 'Quote' or a repository of services used as a Package, or a Master that can be copied into bookings.

The main use of service statuses in PCMs is to determine whether a service is to be included in the cost, or is an 'Optional' (i.e. Alternate) service.

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

7. Click **Exit** to discard any changes.
8. If you click Save and the product requires rates to be loaded manually, the **Service rate requires manual pricing entry** screen appears automatically, showing a line for each pax range entered.

   NOTE: If you know the rates, enter them at this time and click **Save**. If you don't know the rates, they can be entered later, in which case you also click Save.

9. When you click Save, the system displays the PCM Quotes, Itinerary view, showing one service line entered. Click **Insert New Service** to add the next service line.

   INSERT NEW SERVICE

10. Continue adding service lines until all required products are attached to the PCM. The **example PCM** now comprises ten products. This is the completed itinerary for the PCM and can be viewed at any time via menu **PCM Packages > Itinerary**.

PCM NAME	8 Day S.I. Highlights (Self Drive)	REFERENCE	100018	BASE DATE	01-Nov-2023
AGENT	PKGBKG - Packages Debtor	CONSULTANT	Geoff	STATUS	Package

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	CHC	**Budget Rent A Car**	Group C - Compact Automatic - All In...	01-Nov-2023	09-Nov-2023	PS	571.23
1/20	CHC	**Chateau On The Park - A Doubletre...**	Deluxe Room	01-Nov-2023	02-Nov-2023	PS	116.91
2/10	MON	**The Hermitage Hotel**	Standard Room (Mount Cook View)	02-Nov-2023	03-Nov-2023	PS	175.71
2/20	MON	**Discovery Tours**	Lord of the Rings - Classic Tour	02-Nov-2023	1	PS	105.01
3/10	ZQN	**Millennium Queenstown**	Superior Room	03-Nov-2023	04-Nov-2023	PS	118.31
4/10	IVC	**Ascot Park Hotel**	Standard Hotel Room - FIT	04-Nov-2023	06-Nov-2023	PS	249.22
5/10	BLU	**Real Journeys**	RJ5510 Bluff to Stewart Island Return ...	05-Nov-2023	1	PS	196.01
5/20	SZS	**Real Journeys**	RJ5590 Paterson Inlet Cruise & Ulva I...	05-Nov-2023	1	PS	117.61
6/10	DUD	**Mercure Dunedin Leisure Lodge**	Standard Room	06-Nov-2023	07-Nov-2023	PS	146.88
7/10	CHC	**Commodore Airport Hotel**	Superior Room	07-Nov-2023	08-Nov-2023	PS	156.11

11. The PCM also has a **Dashboard view**, which can be selected at any time via menu **PCM Packages > Dashboard**.

PCM NAME	8 Day S.I. Highlights (Self Drive)	REFERENCE	100018	BASE DATE	01-Nov-2023
AGENT	PKGBKG - Packages Debtor	CONSULTANT	Geoff	STATUS	Package

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	2 + 0	4 + 0
VOUCHER COST	770.46	1,562.30	1,333.82
MARKUP %	24.99	25.01	25.05
MARKUP	192.54	390.70	334.18
RETAIL	963.00	1,953.00	1,668.00
COMMISSION %	0.00	0.00	0.00
COMMISSION	0.00	0.00	0.00
AGENT	963.00	1,953.00	1,668.00
INCLUDES TAX	125.61	254.74	217.57
TOTAL	963.00	1,953.00	1,668.00
MARGIN %	19.99	20.01	20.03
MARGIN	192.54	390.70	334.18

Child/Infant Rates from Pax Range: 2 + 0

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Step 2 - Create the Product Package Price

Use the Product application to set up the Package Price Product. There is no major difference in the way this is created when compared to any other product, however, there are some flags that need to be set for a package and these are indicated in the procedure steps.

There are two package options available which define how the package is costed.

- **Package** - for packages with accommodation services "Insert a Product (Package)" below
- **Package Non-Accommodation** - for packages without accommodation services. A Package Non-Accommodation configuration allows packaged services to insert into a booking with group pricing. Pax breaks can be used when package costs vary depending on the number of travelling passengers. "Insert a Product (Package)" below

Insert a Product (Package)

1. Select menu **Home > Products > Product Setup**.
2. Click **Create New Product**.
3. On the **Insert Product** screen, enter data into fields (the top three are drop-down selection fields - entries must already exist before you can select them).

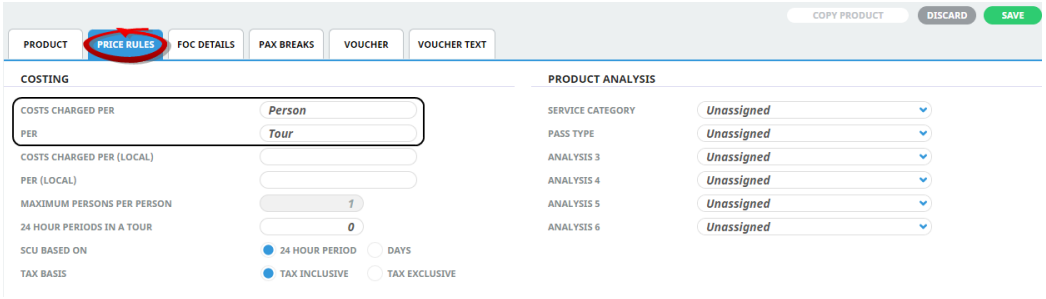
   NOTE: For a package, select the service code to be used for PCM Package Products. The standard code is *PK - Package* which is included in the standard Product Database for a new system. Also select *Package* under Service Category.

4. Click **Save** to keep the changes.
5. Click **Exit** to discard any changes.

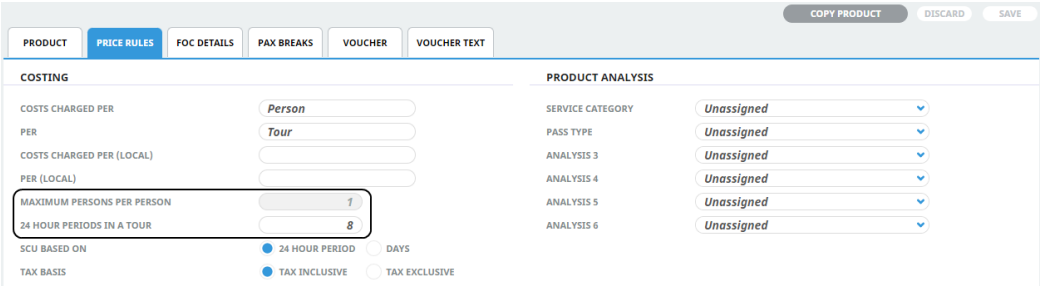
At this point the product exists, but there are no price rules or rates set.

Set PCM Price Rules and Rates

1. On the Product Setup screen, click tab **Price Rules** and set Costs Charged Per to **Person** and Per to **Tour**, as in the example.



2. In the **How many 24 hour periods in a tour** field, insert the **number of nights** for this tour.



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

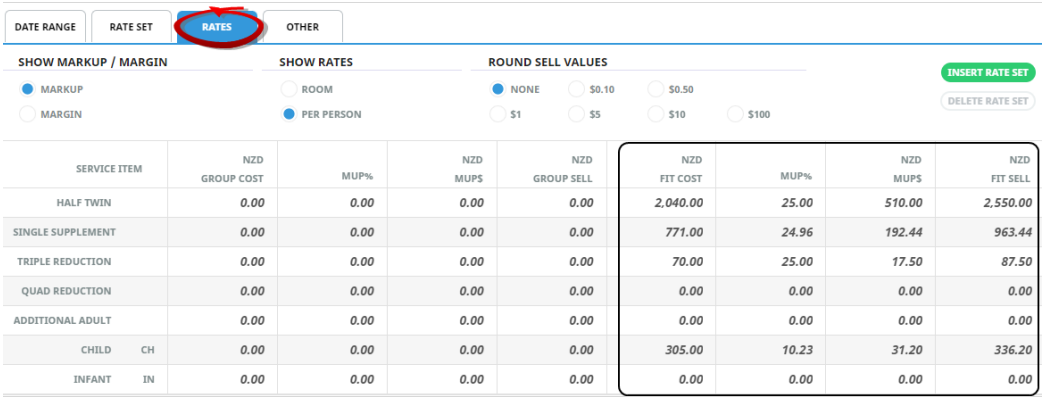
4. Click **Discard** to discard all changes.

5. On the Product Setup screen, select menu **Product Setup > Rates**.

6. On the Product Setup screen, click **Insert** to add a new date range for this product.

7. On the Date Range screen, click the **Rates** tab to add rates to this product.

   NOTE: Make sure **Per Person** is selected under Show Rates.



SERVICE ITEM	NZD GROUP COST	MUP%	NZD MUP$	NZD GROUP SELL	NZD FIT COST	MUP%	NZD MUP$	NZD FIT SELL
HALF TWIN	0.00	0.00	0.00	0.00	2,040.00	25.00	510.00	2,550.00
SINGLE SUPPLEMENT	0.00	0.00	0.00	0.00	771.00	24.96	192.44	963.44
TRIPLE REDUCTION	0.00	0.00	0.00	0.00	70.00	25.00	17.50	87.50
QUAD REDUCTION	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
ADDITIONAL ADULT	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
CHILD CH	0.00	0.00	0.00	0.00	305.00	10.23	31.20	336.20
INFANT IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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

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

About the Rates Entered

The FIT cost and sell prices for the tour are entered here. These rates will be used to cost and sell FIT bookings for this tour via the Tourplan FITs module. The cost rate in this case is based on the pax range from the PCM, which is typically based on the minimum Pax number for a tour. This cost is then used in standard Tourplan operational and management reports.

Group Costs and Sell Rates for this product will only need to be entered here if this package is going to be sold in the Groups application as well.

The FIT cost price is not really relevant either, since when the FIT booking is made, the system will obtain the correct cost prices from the database based on the departure date. The cost price here can be useful to get an indication of the margin.

NOTE: Depending on the way the business' markup strategy is being handled, there could be no markup attached at Product Database level at all. The Markup Matrix allows differing markups to be applied based on a combination of booking analysis codes, supplier codes etc, supplier analysis codes, agent codes, agent analysis codes etc.

Once the Package Service Product has been created, it is attached to the PCM and the rules governing the sale and use of the PCM are set within the PCM (see "Step 3 - Attach the Package Price Product to the PCM" on page 30).

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Package Non-Accommodation

Package Non-Accommodation product provides the ability to divide the price of the packaged non-accommodation services between the number of passengers travelling.

All services in a Non-Accommodation Package must be non-accommodation services although the PCM can include Itinerary services. Package Non-Accommodation operates the same as 'Packages' and the rules governing the sale and use of the PCM are set within the PCM (see "Step 3 - Attach the Package Price Product to the PCM" on page 30).

Insert a Product (Package Non Accommodation)

1. Select menu **Home > Products > Product Setup**.
2. Click **Create New Product**.
3. On the **Insert Product** screen, enter data into fields (the top three are drop-down selection fields - entries must already exist before you can select them).

   NOTE: For a package, select the service code to be used for PCM Package Products. The standard code is *PK - Package* which is included in the standard Product Database for a new system. Also select *Package Non-Accommodation* under Service Category.

4. Check the **completed screen** and make a note of the Code and Description entered.
5. Click **Save** to keep the changes.
6. Click **Exit** to discard any changes.

At this point the product exists, but there are no price rules or rates set.

About the Product Non-Accommodation Rates

Package Non-Accommodation products allow a max pax entry when the defined FCU is not 'Person'. An entry of pax breaks provides a rate structure with pricing variations dependent on the number of passengers booked on the packaged services.

For example: If a 'Package Non-Accommodation' Price Rules FCU is entered per vehicle, and the max passenger per vehicle is set to 4, pax breaks of 1-1, 2-2, 3-3, 4-4, and 5-999 are configured.

- If one person books the package the full vehicle cost is incurred by the single passenger.
- If 2, 3, or 4 passengers book the package the packaged vehicle price is shared between the group.
- If the number of passengers within the booking exceeds 4 pax, multiple vehicles are reserved to accommodate the number of pax travelling.

Price Rules Tab:

PRODUCT | PRICE RULES | FOC DETAILS | PAX BREAKS | VOUCHER | VOUCHER TEXT

COSTING

COSTS CHARGED PER	Car
PER	Tour
COSTS CHARGED PER (LOCAL)	
PER (LOCAL)	
MAXIMUM PERSONS PER CAR	4
24 HOUR PERIODS IN A TOUR	8
SCU BASED ON	24 HOUR PERIOD / DAYS
TAX BASIS	TAX INCLUSIVE / TAX EXCLUSIVE

PRODUCT ANALYSIS

SERVICE CATEGORY	Unassigned
PASS TYPE	Unassigned
ANALYSIS 3	Unassigned
ANALYSIS 4	Unassigned
ANALYSIS 5	Unassigned
ANALYSIS 6	Unassigned

GROUP COSTING

	ESCORT	DRIVER	GUIDE
MAIN PRODUCT	Yes	Yes	Yes

INVOICE TEXT

LINE 1	Our Own Office - Christchurch	LINE 3	
LINE 2	Non Accommodation Package	LINE 4	

Pax Breaks Tab:

Configure the Pax Breaks required and assign if children and infants are included in the seat count.

PRODUCT | PRICE RULES | FOC DETAILS | PAX BREAKS | VOUCHER | VOUCHER TEXT

PAX BREAKS

- ✔ INCLUDE CHILDREN IN PAX BREAKS
- ✔ INCLUDE INFANTS IN PAXBREAKS

1 -	1
2 -	2
3 -	3
4 -	4
5 -	9,999

Rates:

DATE RANGE | RATE SET | RATES | OTHER

SHOW MARKUP / MARGIN: MARKUP / MARGIN

SHOW RATES: ROOM / PER PERSON

ROUND SELL VALUES: NONE / $0.10 / $0.50 / $1 / $5 / $10 / $100

INSERT RATE SET | DELETE RATE SET | SET CHILD RATES

PAX RANGES		NZD GROUP COST	MUP%	NZD MUP$	NZD GROUP SELL	NZD FIT COST	MUP%	NZD MUP$	NZD FIT SELL
1 - 1	AD	250.00	0.00	0.00	250.00	250.00	0.00	0.00	250.00
2 - 2	AD	250.00	0.00	0.00	250.00	250.00	0.00	0.00	250.00
3 - 3	AD	250.00	0.00	0.00	250.00	250.00	0.00	0.00	250.00
4 - 4	AD	250.00	0.00	0.00	250.00	250.00	0.00	0.00	250.00
5 - 9999	AD	250.00	0.00	0.00	250.00	250.00	0.00	0.00	250.00
1 - 1	CH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2 - 2	CH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3 - 3	CH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4 - 4	CH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5 - 9999	CH	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
1 - 1	IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
2 - 2	IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
3 - 3	IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
4 - 4	IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
5 - 9999	IN	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

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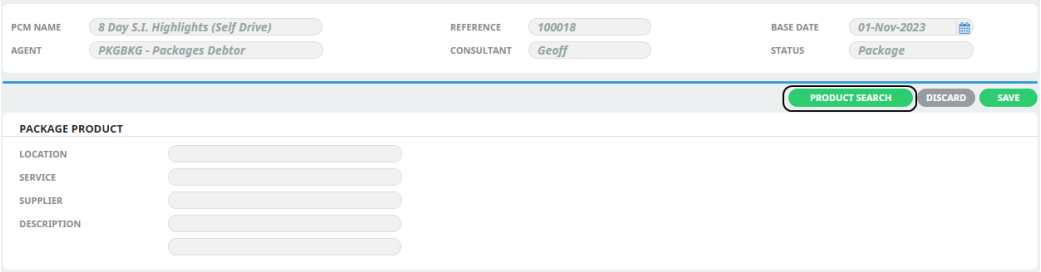
Step 3 - Attach the Package Price Product to the PCM

This step attaches the Package Price Product to a PCM, thereby creating a Package PCM.

Attach a Package Price Product to a PCM

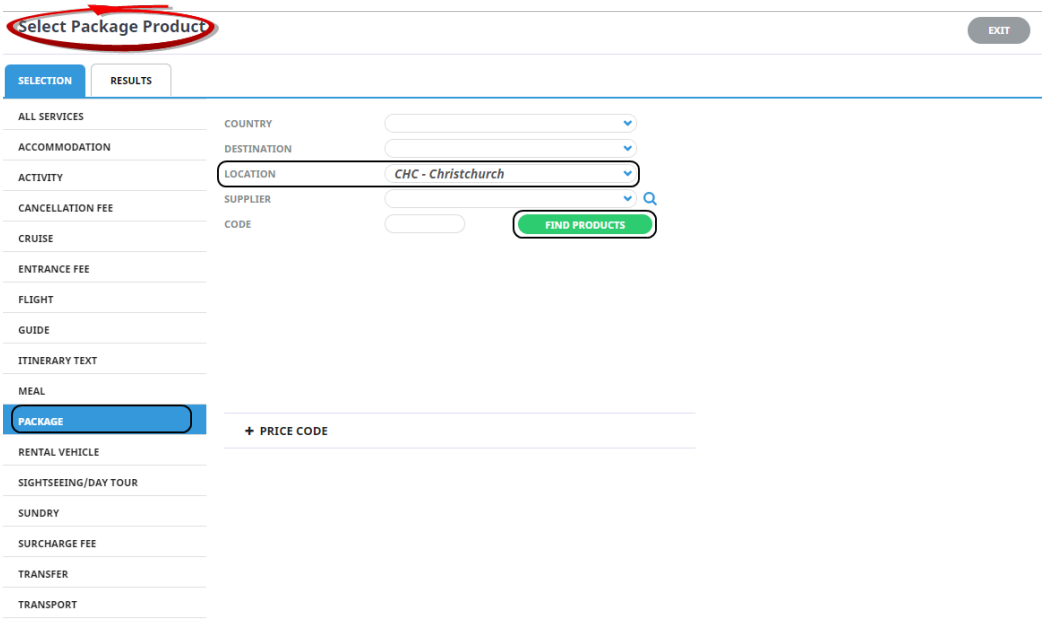
1. On the Product menu select **PCM Package Setup > Operation > Package Setup**.

2. On the **PCM Package Setup** screen, click the green Product Search button.

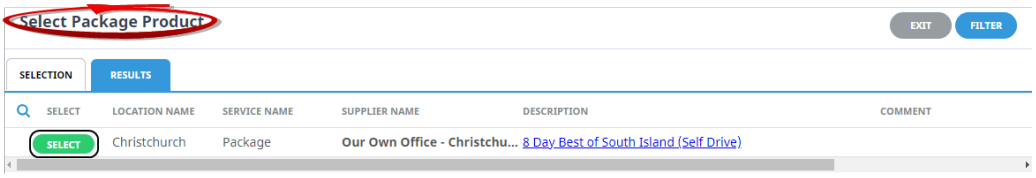


3. Click **Product Search** to find a package.

4. On the **Select Package Product** screen (Selection tab), select **Package** under All Services, select either Location or Supplier (or both) and click the green **Find Products** button.



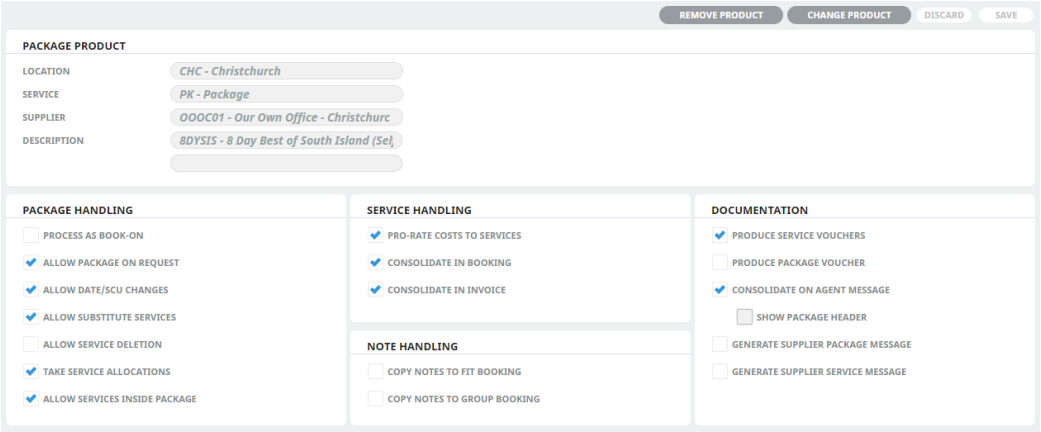
5. On the **Select Package Product** screen (Results tab), click the green Select button that matches your product.



6. On the **PCM Package Product** screen, note the default check-box selections under each of the section headings.

7. Change the default selections according to the descriptions given in "About the PCM Package Fields and Selections" below.

   The **8 Day S.I. Highlights (Self Drive)** example shows one set of selections - you may need to choose other options for your PCM Package.



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

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

About the PCM Package Fields and Selections

Package Handling Section

The check boxes in this section of the screen determine how FIT bookings for this Package will be processed:

- What changes (if any) can be made to the PCM products at the time of entering the FIT booking.
- Voucher production options.
- Service Handling in the Bookings, Invoicing and Itinerary production.
- PCM Products messaging options.

Process As Book-On

For FIT Package Tours, this must be left unchecked.

Take Service Allocations

Checking this box will automatically take inventory from allocations (where available), as each FIT booking is made on the Tour. For example, if the PCM contains an accommodation service, which has allocation available for the date(s) being booked, then it will be taken.

Allow Services Inside Package

Checking this box will allow extra Products to be added to a booking within the dates defined for the Package. For example, optional day tours may be offered that are not included in the package.

This question does *not* apply to products added to a FITs service list before the start and after the end dates of a Package; e.g. pre and post accommodation.

Service Handling Section

Pro-rate Costs To Services

Checking this box will pro-rate the Package Product sell price across all the PCM products in the FIT Bookings.

For FIT package tours, this should be checked. If it is not, when the services are imported into the FIT booking, the Cost Prices will be blank, which then causes issues when supplier invoices are received because the cost prices for the services will be blank.

Consolidate In Booking

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This question determines how the package will be displayed in the FITs Product List screen. Checking this box (the typical setting for scheduled tours) will display the package as one service line in the FIT booking and to view the package components, click on that service line.

Leaving this box unchecked will display the package first, with the component services listed below.

Consolidate In Invoice

If the previous Pro-rate Costs to Services box is left unchecked, this box is checked and dimmed-out. This is because when the costs for a package are consolidated in a booking, it is not possible to then invoice the booking to the agent on a service-by-service (i.e. component) basis. Any products added to the booking that are external to the package (either within the days of the package as additional services or outside of the package) will display as separate lines on the invoice.

Invoicing message configuration can output a consolidated service line price for package headers if the consolidate invoice check box is checked.

Note Handling Section

Copy Notes To FIT Booking

If this box is checked, any notes that are attached to the PCM will be copied into the FIT Bookings as the booking is created.

Documentation Section

Produce Service Vouchers

Checking this box will produce vouchers for each of the products in the package for each FIT booking entered in the Tourplan FITs module.

Produce Package Voucher

This box is NOT checked for FIT package tours.

Consolidate on Agent Message

Checking this box outputs just the package product on Agent messages; e.g. a booking confirmation message.

Generate Supplier Package Message

Checking this box enables message(s) to be sent to the supplier attached to the package product. This is generally internal, so there is no real need to have this checked. If a specific department in the company is responsible for operating the packages, then this box can be checked so that messages can be sent to that department.

Generate Supplier Service Message

For FIT Package tours this can be checked so that messages can be sent to the suppliers of services in the package.

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Service Substitution

This facility allows a list of alternative (substitute) products to be defined for one or more of the Package products.

The substitute products must already have been created in the Product application. Service substitutions can then be made during FITs processing. By having only allowable substitutions available, it means that consultants cannot substitute products of a different category or price if the original product is unavailable.

NOTE: This functionality is only available in FIT Packages.

Define Substitute Products for a PCM Package

1. Search for, and retrieve, an **existing PCM**.

   a. From the Home page, select menu **Home > Product > PCM Package Setup**.

   b. Leaving the PCM Name field blank, click the **Search icon** to open the full PCM Search screen.

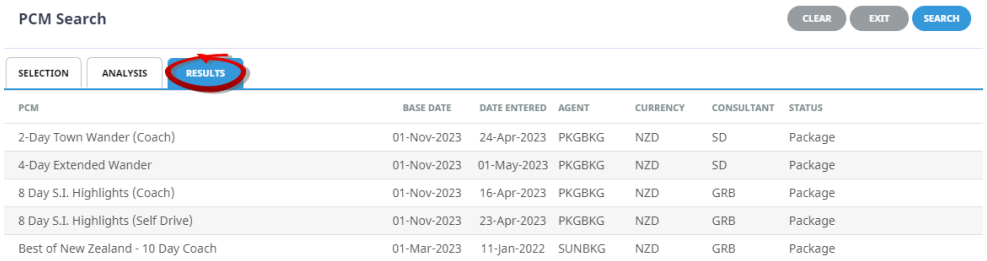
   c. Enter search criteria in any of the search fields to refine your selection.

   NOTE: Don't forget about dates - results are returned within the date ranges set.

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

   e. Examine the list of **Results**.

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

PCM	BASE DATE	DATE ENTERED	AGENT	CURRENCY	CONSULTANT	STATUS
2-Day Town Wander (Coach)	01-Nov-2023	24-Apr-2023	PKGBKG	NZD	SD	Package
4-Day Extended Wander	01-Nov-2023	01-May-2023	PKGBKG	NZD	SD	Package
8 Day S.I. Highlights (Coach)	01-Nov-2023	16-Apr-2023	PKGBKG	NZD	GRB	Package
8 Day S.I. Highlights (Self Drive)	01-Nov-2023	23-Apr-2023	PKGBKG	NZD	GRB	Package
Best of New Zealand - 10 Day Coach	01-Mar-2023	11-Jan-2022	SUNBKG	NZD	GRB	Package

   f. Click a **PCM** to retrieve it.

   g. The retrieved PCM is displayed in the PCM **Dashboard View**.

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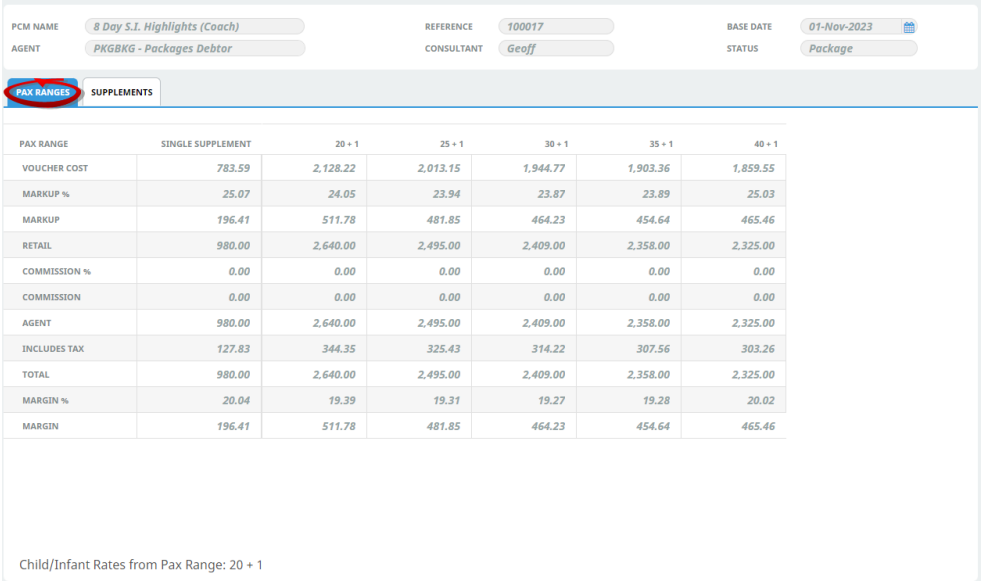
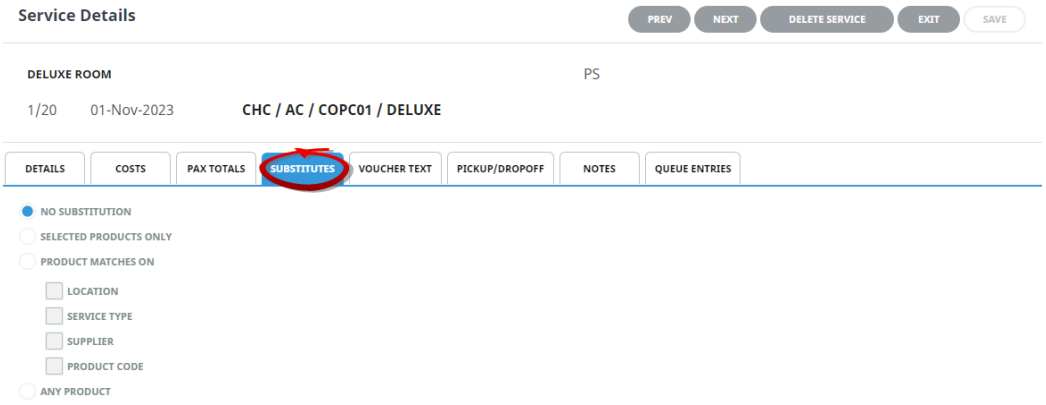
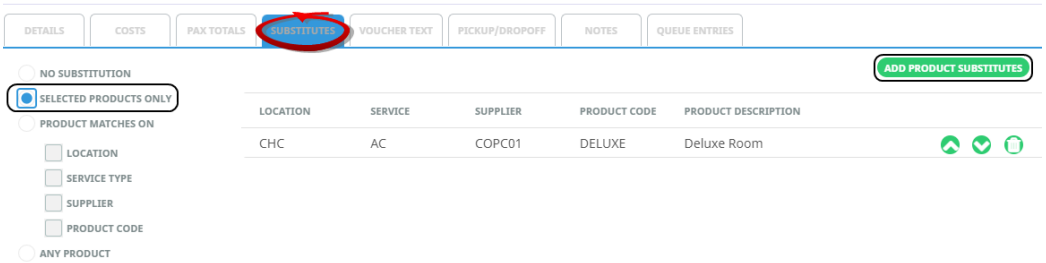


PAX RANGE	SINGLE SUPPLEMENT	20 + 1	25 + 1	30 + 1	35 + 1	40 + 1
VOUCHER COST	783.59	2,128.22	2,013.15	1,944.77	1,903.36	1,859.55
MARKUP %	25.07	24.05	23.94	23.87	23.89	25.03
MARKUP	196.41	511.78	481.85	464.23	454.64	465.46
RETAIL	980.00	2,640.00	2,495.00	2,409.00	2,358.00	2,325.00
COMMISSION %	0.00	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	0.00	0.00	0.00	0.00	0.00
AGENT	980.00	2,640.00	2,495.00	2,409.00	2,358.00	2,325.00
INCLUDES TAX	127.83	344.35	325.43	314.22	307.56	303.26
TOTAL	980.00	2,640.00	2,495.00	2,409.00	2,358.00	2,325.00
MARGIN %	20.04	19.39	19.31	19.27	19.28	20.02
MARGIN	196.41	511.78	481.85	464.23	454.64	465.46

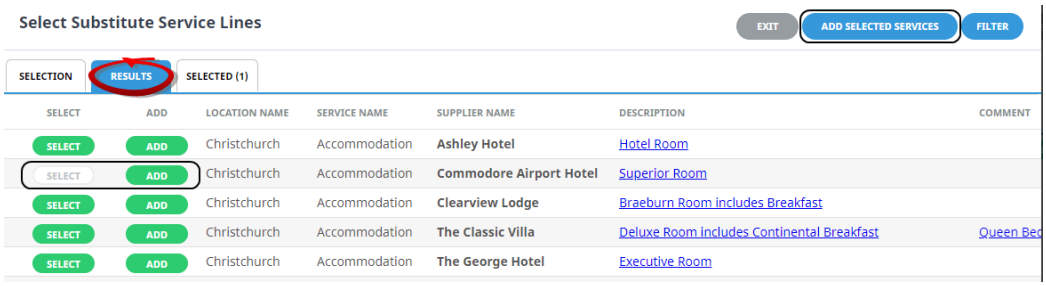
2. Switch to **Itinerary** view for the PCM.
3. Click the existing **Service Line** to display the Service Details screen.
4. On the **Service Details** screen, click the Substitutes tab.



5. Change the radio button from the default No Substitution to **Selected Products Only** and click the green **Add Product Substitutes** button.



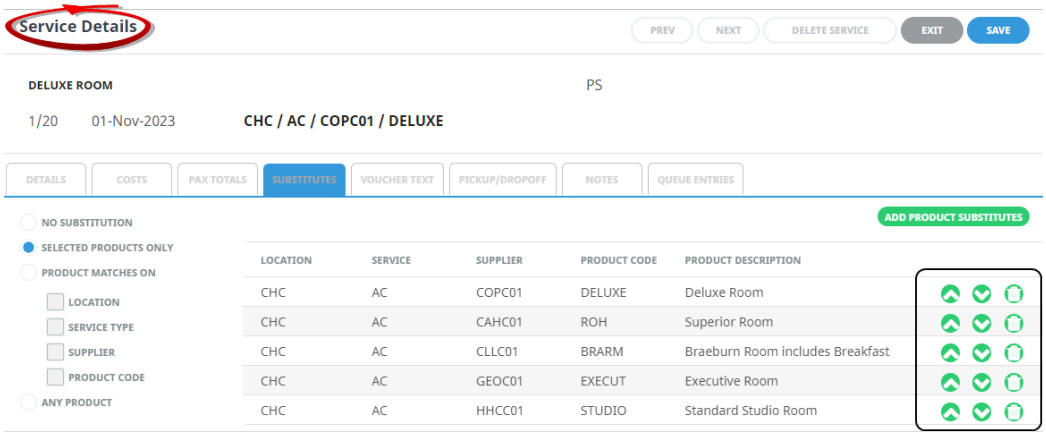
6. On the Select Substitute Service Lines screen, choose a service category under All Services, enter a relevant Location (and any other search criteria to narrow down the list returned) and click **Find Products**.
7. From the results list returned (on the **Select Substitute Service Lines** screen), click the green **Select** button beside each product you wish to add as a substitute.



NOTE: If there is only one product you wish to add, click Add rather than Select.

8. Click **Add Selected Services** to add these as alternatives to products already in the list.

9. On the **Service Details** screen, move the alternatives up or down depending on order of preference.



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

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

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Price Analysis

This is the third of five tasks in this section of the user manual that describes miscellaneous functions under the *PCM Quotes* > *Operation* menu.

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

The full list is:

1. Package Setup
2. Documentation
3. "Price Analysis" above (this task)
4. Queue Entries
5. Contacts

Tourplan's Price Analysis functionality allows users to insert a date range for the system to analyse and identify any price differences within the dates specified. Users are then given the option to recalculate the PCM where price increases or decreases are visible for a selection of dates seen in the Pax Ranges and Supplements Tab.

PCM Package prices can be analysed prior to package product rates being attached. Follow the procedure below to set specific costs per date range.

Performing a PCM Price Analysis

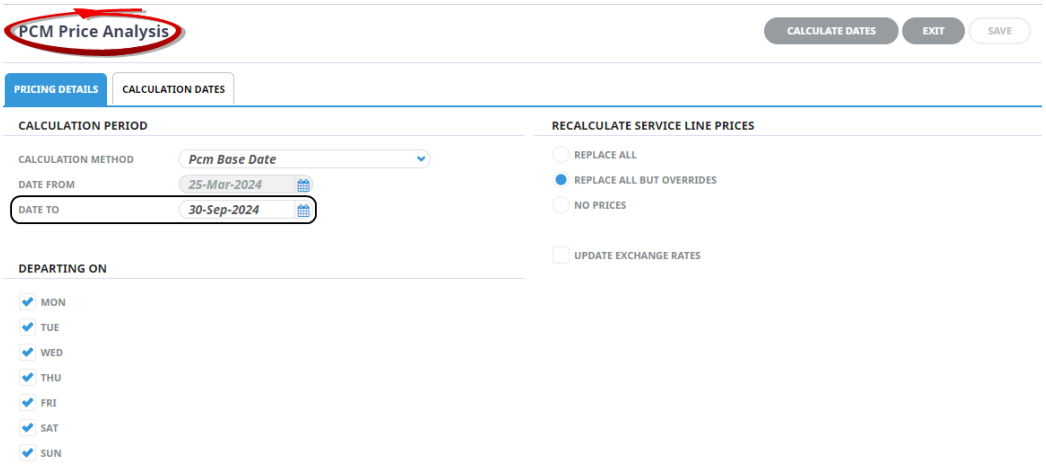
1. Search for and retrieve a PCM to work with. If you haven't done this already, see Retrieve an Existing PCM.

2. Select menu **PCM Quotes > Operation > Price Analysis**.

3. To analyse the costs for a range of dates, click **Analyse**.

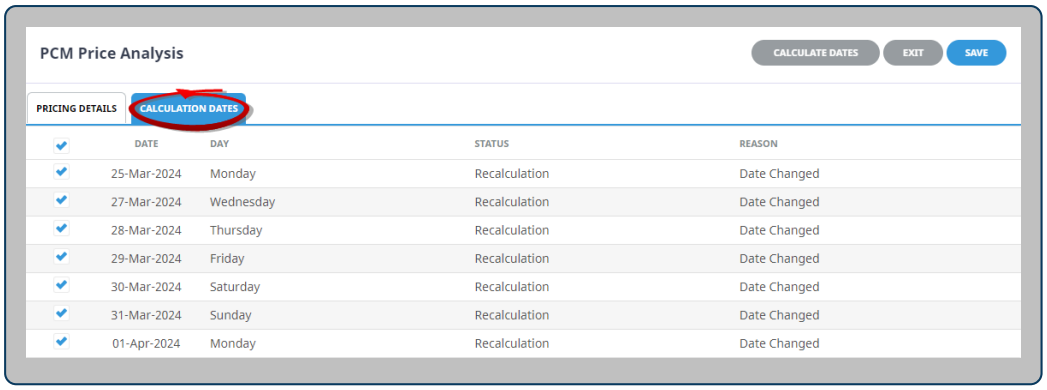
   ANALYSE

4. On the **PCM Price Analysis** screen, enter the *Date To* field and select how the system is to recalculate.



5. Click **Calculation Dates** tab or the **Calculation Dates** button to view available recalculation date options.

   RECALCULATE DATES



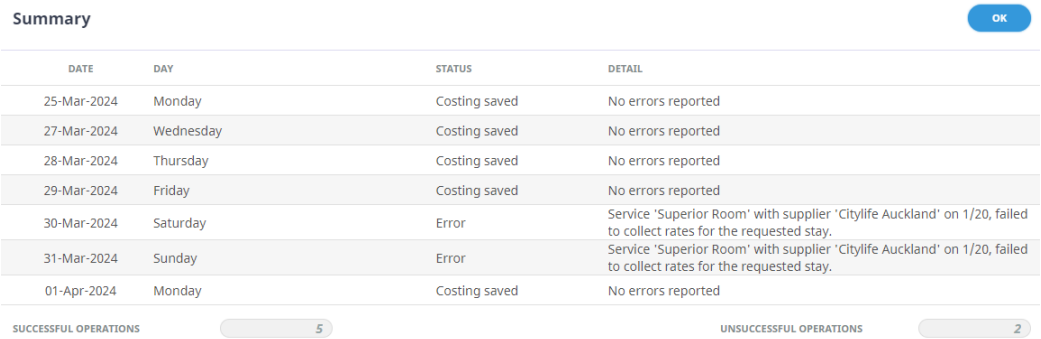
DATE	DAY	STATUS	REASON
25-Mar-2024	Monday	Recalculation	Date Changed
27-Mar-2024	Wednesday	Recalculation	Date Changed
28-Mar-2024	Thursday	Recalculation	Date Changed
29-Mar-2024	Friday	Recalculation	Date Changed
30-Mar-2024	Saturday	Recalculation	Date Changed
31-Mar-2024	Sunday	Recalculation	Date Changed
01-Apr-2024	Monday	Recalculation	Date Changed

6. 'Select all' is the default setting, all identified recalculation changes will be selected. Users can select specific dates to re-calculate if required.

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

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

   NOTE: A summary screen will display if **Save** is selected. The summary screen provides details of the recalculated dates, records any reported errors and the status of the PCM costings.



DATE	DAY	STATUS	DETAIL
25-Mar-2024	Monday	Costing saved	No errors reported
27-Mar-2024	Wednesday	Costing saved	No errors reported
28-Mar-2024	Thursday	Costing saved	No errors reported
29-Mar-2024	Friday	Costing saved	No errors reported
30-Mar-2024	Saturday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
31-Mar-2024	Sunday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
01-Apr-2024	Monday	Costing saved	No errors reported

SUCCESSFUL OPERATIONS 5 UNSUCCESSFUL OPERATIONS 2

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

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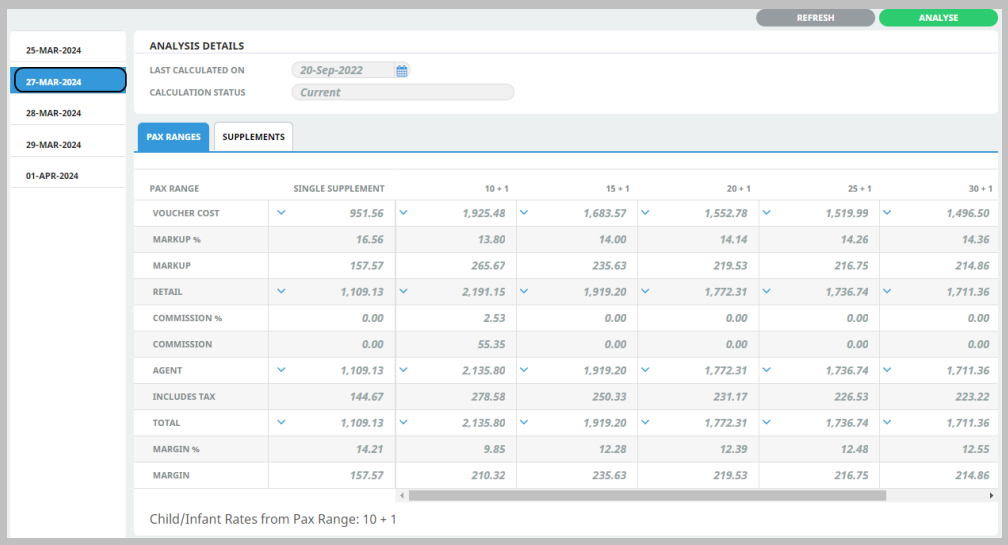
10. A list of date ranges will show to the left of the screen and values per pax range / supplement are available.

    NOTE: The up and down arrow indicates a price increase or decrease from the original PCM base date quotation.

You can see from this example: the 27th of March has a price decrease from the 25th March which was the original Base Date costing.



PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1
VOUCHER COST	951.56	1,925.48	1,683.57	1,552.78	1,519.99	1,496.50
MARKUP %	16.56	13.80	14.00	14.14	14.26	14.36
MARKUP	157.57	265.67	235.63	219.53	216.75	214.86
RETAIL	1,109.13	2,191.15	1,919.20	1,772.31	1,736.74	1,711.36
COMMISSION %	0.00	2.53	0.00	0.00	0.00	0.00
COMMISSION	0.00	55.35	0.00	0.00	0.00	0.00
AGENT	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
INCLUDES TAX	144.67	278.58	250.33	231.17	226.53	223.22
TOTAL	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
MARGIN %	14.21	9.85	12.28	12.39	12.48	12.55
MARGIN	157.57	210.32	235.63	219.53	216.75	214.86

About PCM Analysis Fields

Calculation Method

- Date Range - allows for a range of dates to recalculate the PCM based on the first date of the date range and will look for each difference from the product database to provide new values.
- PCM Base Date - will take the values on the PCM currently and then compare the first expected change in those values.

NOTE: In both cases a new set of values will be identified and the next expected date change will be compared to the previous date not to the original PCM values.

Date From/To

Dates or a range of dates for the Price Analysis function to retrieve values from the Product Database for each service in the PCM.

NOTE: If PCM Base Date is selected as the Calculation Method the Date From field will be disabled.

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 PCM values with any changes in exchange rates between service and PCM currencies.

Copy Bulk PCMs from Analysis

A PCM Quotes can be 'duplicated' to create multiple new PCM Quotes with updated Base Dates - using the Bulk Copy process from within the PCM Analysis Screen.

A 'Create PCMs' button is enabled if the Price Analysis identifies dates with different prices compared to the PCM Base Date.

Copy Bulk PCM Quotes from Analysis

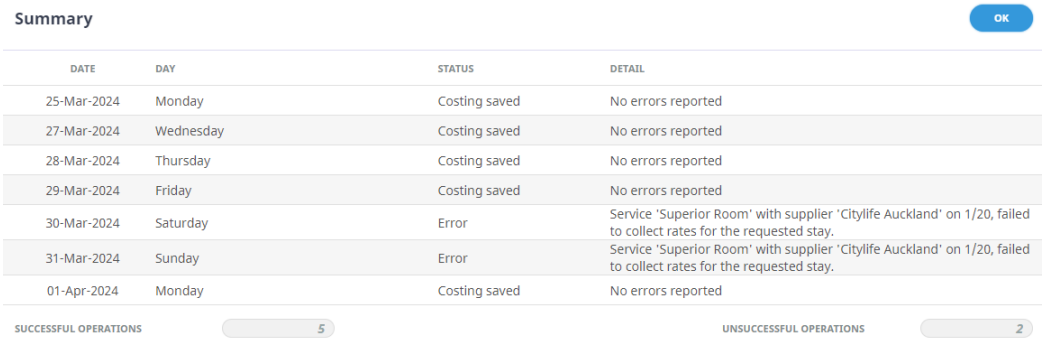
1. Search for and retrieve a PCM to work with. If you haven't done this already, see Retrieve an Existing PCM.

2. Select menu **Product > PCM Quotes > Operation > Price Analysis**.

3. To analyse the costs for a range of dates, click **Analyse**.

   ANALYSE

4. **NOTE:** A summary screen will display if **Save** is selected. The summary screen provides details of the recalculated dates, records any reported errors and the status of the PCM costings.



Summary

OK

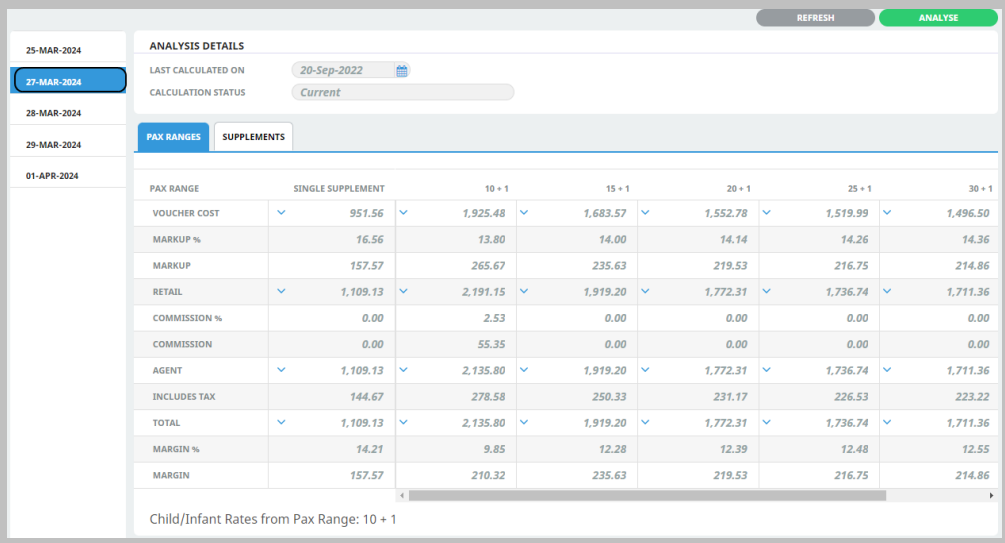
DATE	DAY	STATUS	DETAIL
25-Mar-2024	Monday	Costing saved	No errors reported
27-Mar-2024	Wednesday	Costing saved	No errors reported
28-Mar-2024	Thursday	Costing saved	No errors reported
29-Mar-2024	Friday	Costing saved	No errors reported
30-Mar-2024	Saturday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
31-Mar-2024	Sunday	Error	Service 'Superior Room' with supplier 'Citylife Auckland' on 1/20, failed to collect rates for the requested stay.
01-Apr-2024	Monday	Costing saved	No errors reported

SUCCESSFUL OPERATIONS 5 UNSUCCESSFUL OPERATIONS 2

5. Click **OK** to keep the changes and save or update the entry.
6. A list of date ranges will show to the left of the screen and values per pax range / supplement are available.

   NOTE: The up and down arrow indicates a price increase or decrease from the original PCM base date quotation.

You can see from this example: the 27th of March has a price decrease from the 25th March which was the original Base Date costing.



REFRESH ANALYSE

25-MAR-2024
27-MAR-2024
28-MAR-2024
29-MAR-2024
01-APR-2024

ANALYSIS DETAILS

LAST CALCULATED ON 20-Sep-2022
CALCULATION STATUS Current

PAX RANGES SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1
VOUCHER COST	951.56	1,925.48	1,683.57	1,552.78	1,519.99	1,496.50
MARKUP %	16.56	13.80	14.00	14.14	14.26	14.36
MARKUP	157.57	265.67	235.63	219.53	216.75	214.86
RETAIL	1,109.13	2,191.15	1,919.20	1,772.31	1,736.74	1,711.36
COMMISSION %	0.00	2.53	0.00	0.00	0.00	0.00
COMMISSION	0.00	55.35	0.00	0.00	0.00	0.00
AGENT	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
INCLUDES TAX	144.67	278.58	250.33	231.17	226.53	223.22
TOTAL	1,109.13	2,135.80	1,919.20	1,772.31	1,736.74	1,711.36
MARGIN %	14.21	9.85	12.28	12.39	12.48	12.55
MARGIN	157.57	210.32	235.63	219.53	216.75	214.86

Child/Infant Rates from Pax Range: 10 + 1

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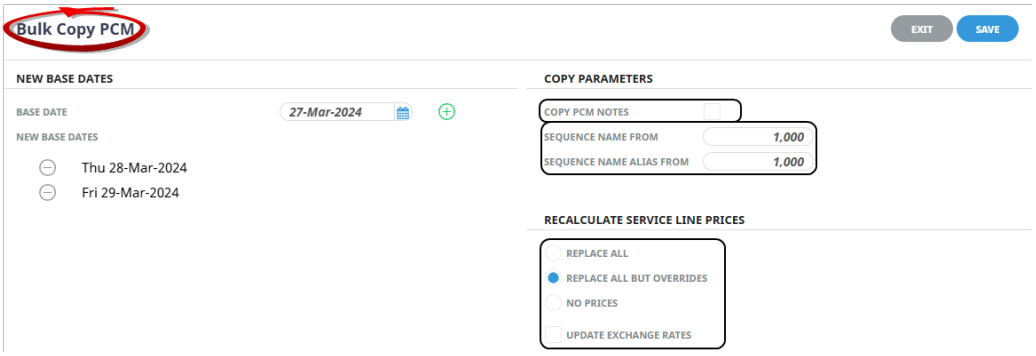
7. Click **Create PCMs**.

8. The **Bulk Copy PCM** screen opens with a list of New Base Dates copied from the Analysis Details screen. To copy the PCM notes, tick the **Copy PCM Notes** checkbox. Enter the **Sequence Name From** and **Sequence Name Alias From** values, and click the **Radio** button as to how the Service Line prices are to be recalculated.



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

10. A **Summary** of Successful Operations opens, listing the: PCM Base Date, Day, PCM Name (with Sequence numbers appended), New PCM Reference Number and a brief Summary Detail for each PCM created.

11. Click **OK** to keep the changes and save or update the entry.
12. To view copied PCMs, use the PCM search feature. The newly created PCMs will have a sequence number appended to the booking name. See Retrieve an Existing PCM.

About Bulk Copy PCM Fields

New Base Dates

Base Date

The Base Date displaying defaults from the first listed date from the Analysis Details screen, click the green plus button to include this entry as a New Base Date.

New Base Dates

A list of pre-defined base dates has transferred from the Analysis Details screen, each Base Date listed creates a new PCM in the Bulk Copy process, and the services will update in the PCM to match the New Base Date. If a New Base Date is not required, use the grey minus button to remove the date from the list.

Copy Parameters

Copy PCM Notes

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

Sequence Name From

When a new PCM is created from the copied PCM in a bulk copy process, all PCM details are copied including the PCM Name. This numerical setting is appended to the copied PCM, and when multiple PCMs are created the number will append sequentially starting with the value inserted here.

NOTE: If a PCM Name and sequence number already exist for a PCM, the system assigns the next available sequence number.

Sequence Name Alias From

When a new PCM is created from the copied PCM in a bulk copy process, all PCM details are copied including the PCM Alias Name. This numerical setting is appended to the copied PCM, and when multiple PCMs are created the number will append sequentially starting with the value inserted here.

NOTE: If a PCM Name Alias and sequence number already exist for a PCM, 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 PCM services are re-costed should Tourplan continue to use the previous exchange rates (unchecked) or use the exchange rates from the Tourplan Code Setup Module.

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CHAPTER 4

Setting Up Component Package Tours

A "Component Package Tour" is a scheduled departure series, Seat in Coach tour which is made up of two or more component tours which can be sold as tours in their own right.

In simple terms, the setup of the components is based around PCM's, each with a Package Database Product attached, and with Fixed Departure Dates and availability (Allocations) for each component.

In this chapter ...

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Component Package Tours Setup Steps 81
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Step 2 - Create Package Database Products 86
Step 3 - Create Departure Dates & Availability 88
Allocation Maintenance 90
Retrieving an Existing Allocation 91
View Used Allocation Details 94
Remove Attached Products 95
Extending or Adding to Allocations 96
Change Allocation Quantities / Release Period 97
Move Allocations Between Allocations and Sub-Allocations 98
Delete Allocations 99
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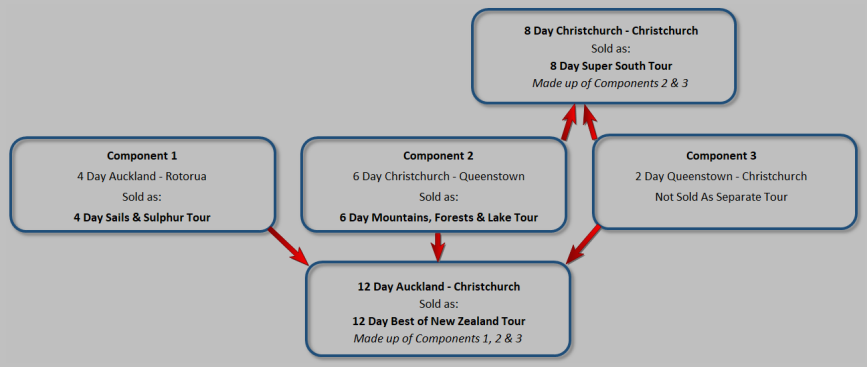
View Allocations 108

Example Component Tour

The PCM's for the component tours are then populated with the relevant PCM Package products, plus any 'joiner' products that may be required.

The diagram below shows 4 tours which are able to be sold as individual tours. Of those 4 tours, 3 are components which make up the 4th & 5th.



Schematic Diagram of the required PCM's.

PCM Tour Name	Package Product	Allocation	Sat 4-Apr	Sun 5-Apr	Mon 6-Apr	Tue 7-Apr	Wed 8-Apr	Thur 9-Apr	Fri 10-Apr	Sat 11-Apr	Sun 12-Apr	Mon 13-Apr	Tue 14-Apr	Wed 15-Apr
12 Day Best of NZ	AKL PK OOOC01 12DBNZ	12 DBNZ	D1 - AKL	D2 - ROT	D3 - ROT	D4 - CHC	D5 - CHC	D6 - GMN	D7 - WHO	D8 - ZQN	D9 - ZQN	D10 - ZQN	D11 - CHC	D12 - DEP
4 Day Sails & Sulphur	AKL PK OOOC01 4DYSS	4DYSS	D1 - AKL	D2 - ROT	D3 - ROT	D4 - DEP								
6 Day Mountains Forests & Lakes	CHC PK OOOC01 6DYNFK	6DYNFK					D1 - CHC	D2 - GMN	D3 - WHO	D4 - ZQN	D5 - ZQN	D6 - DEP		
2 Day Queenstown Christchurch	ZQN PK OOOC01 2DZQCH	2DZQCH										D1 - ZQN	D2 - CHC	D3 - DEP
8 Day Super South	CHC PK OOOC01 8DAYSS	8DAYSS					D1 - CHC	D2 - GMN	D3 - WHO	D4 - ZQN	D5 - ZQN	D6 - ZQN	D7 - CHC	D8 - DEP

AKL = Auckland	Allocation Day
ROT = Rotorua	DEP = Finish/Departure
GMN = Greymouth	D1 etc = Day 1
ZQN = Queenstown	
CHC = Christchurch	
WHO = Franz Josef	

The schematic above shows the 5 PCM's that are required to set up the Tour Series being used in this example. In essence, Component Tours are a collection of services built into Package Tours that are then joined together as components of the main (in this case, 12 day) tour.

The Tourplan NX system is very specific about what the definition of a 'Package' is. In relation to Scheduled Group Tours, the PCM User Manual (Types of Packages) uses the following definition:

» A coach tour type of package which has seats sold to a number of FIT passengers. i.e., the Tourplan NX user company is selling 'seats' on a group tour. These types of packages must have specific departure dates. The passengers travel as a group. The Escort/Driver carries vouchers covering the complete group.

When one of the Tours/Components is booked in FIT's, the availability of all affected components is updated. There is a process Tour Operations - Book On/Rolled Up Group Bookings which creates (or updates) a Tourplan NX Group Book booking for each of the component tours for their relevant departure dates.

In the example series used in this document there are Package Products for each tour, and Allocations attached to each of those Package Products. Two of the tours - 12 Day Best of New Zealand and 8 Day Super South - are made up almost totally of Component Packages. It is at *Component* level that pax numbers need to be maintained to calculate available spaces on the various departures. Reports are available to assist in ascertaining these numbers.

The resulting Group Tours are the Tourplan NX bookings that are physically operated and from which the Vouchers are issued.

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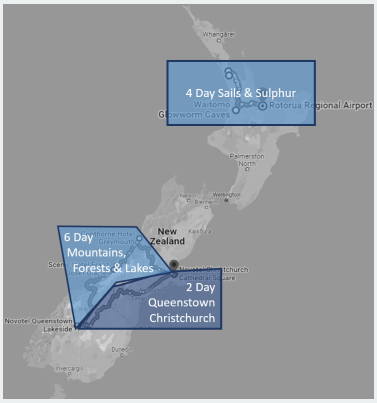
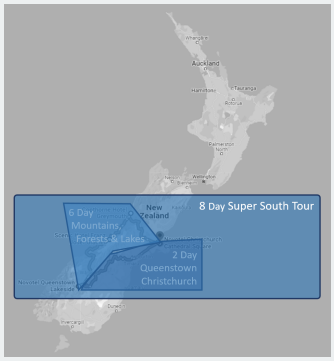
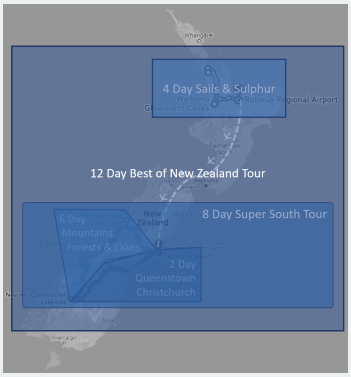
Component Package Tours Setup Steps

The setup steps required to create and operate component package tours are:

1. Determine the break points that are in the longest tour (12 Day). A break point is a point in the tour itinerary where pax numbers are able and likely to change – i.e., the start/end point of the components.
2. Create PCM's for each of the component and saleable tours. See "Step 1 - Create PCMs" on the next page
3. Create Package Service Products which hold the selling prices for each of the components and saleable tours. See "Step 2 - Create Package Database Products" on page 86
4. Create departure dates and availability in Tourplan NX Allocations. See "Step 3 - Create Departure Dates & Availability" on page 88
5. Attach each of the Package Service Products created in 3. to the PCM's created in 2. See "Step 4 - Attach Package Products to PCM's" on page 101.
6. F.I.T. bookings. See "Understanding Tour Operations - F.I.T. Bookings" on page 104.
7. Group Bookings. See Tour Operations - Book On/Rolled Up Group Bookings.
8. Reports. Tour Operations - Reporting.

Step 1 - Create PCMs

The example Tour Series is made up of 5 PCM's. They are constructed as follows:

4 Day Sails & Sulphur 6 Day Mountains, Forests & Lakes 2 Day ZQN-CHC	8 Day Super South Tour	12 Day Best of New Zealand Tour
		

These three PCM's have standard service options from the product database in them - Transport, Accommodation etc.

- **8 Day Super South Tour**

  This PCM has Package Products in it – i.e., Products that are attached to the applicable PCM's as a Package Option. In the 8 Day Super South is the package product attached to the 6 Day Mountains, Forests & Lakes and the package product attached to the 2 Day ZQN - CHC.

- **12 Day Best of NZ Tour**

  This PCM uses the Package Products of the 4 Day Sails & Sulphur, the 6 Day Mountains, Forests & Lakes and the 2 Day ZQN - CHC . It also has some 'filler' services from the product database that join some of the components - e.g., flight from Rotorua to Christchurch and Christchurch accommodation.

NOTE: Detailed instruction on PCM creation can be found in the PCM Quotes User Manual under Creating New PCM's.

The Component PCM's are used to store the standard services for each of the components. As the system processes a Component Package Tour booking, the services are physically copied into each F.I.T. booking. The Product Database is integrated to get the Service Date cost price and the Package Product attached to the PCM provides the sell price, based on the travel date.

Screen shots of the 3 PCM's that have only "standard" services in them are shown below.

Each PCM has been given the same name as the Tour it is going to be sold as. They all have a PCM Status that indicates they are a Package, and all services have a Package Service status.

> It is important to ensure that Day 1 of each PCM matches the day of the week that the tour is going to commence on - as per the "Schematic Diagram of the required PCM's." on page 80 If it doesn't, some products may have some day restrictions on them and Allocation (and therefore Departure) Dates will be incorrect and the tours will not be able to be booked.

4 Day Sails & Sulphur PCM

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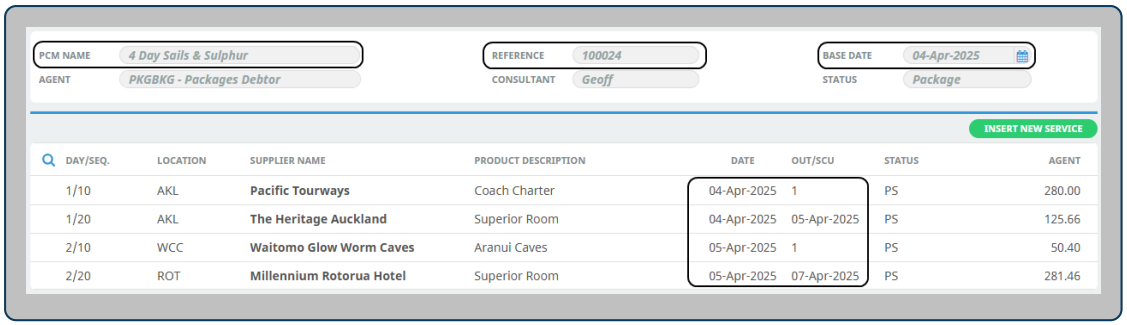
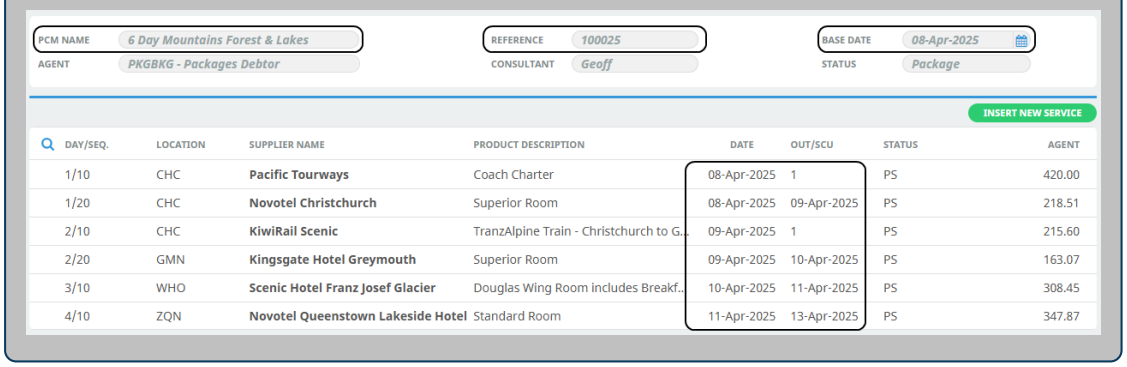


PCM NAME: 4 Day Sails & Sulphur | REFERENCE: 100024 | BASE DATE: 04-Apr-2025
AGENT: PKGBKG - Packages Debtor | CONSULTANT: Geoff | STATUS: Package

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	Pacific Tourways	Coach Charter	04-Apr-2025	1	PS	280.00
1/20	AKL	The Heritage Auckland	Superior Room	04-Apr-2025	05-Apr-2025	PS	125.66
2/10	WCC	Waitomo Glow Worm Caves	Aranui Caves	05-Apr-2025	1	PS	50.40
2/20	ROT	Millennium Rotorua Hotel	Superior Room	05-Apr-2025	07-Apr-2025	PS	281.46

6 Day Mountains Forest & Lakes PCM

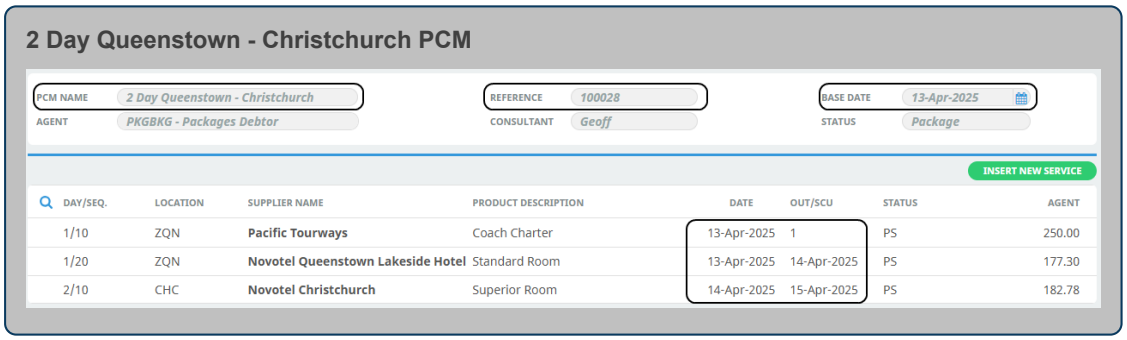


PCM NAME: 6 Day Mountains Forest & Lakes | REFERENCE: 100025 | BASE DATE: 08-Apr-2025
AGENT: PKGBKG - Packages Debtor | CONSULTANT: Geoff | STATUS: Package

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	CHC	Pacific Tourways	Coach Charter	08-Apr-2025	1	PS	420.00
1/20	CHC	Novotel Christchurch	Superior Room	08-Apr-2025	09-Apr-2025	PS	218.51
2/10	CHC	KiwiRail Scenic	TranzAlpine Train - Christchurch to G...	09-Apr-2025	1	PS	215.60
2/20	GMN	Kingsgate Hotel Greymouth	Superior Room	09-Apr-2025	10-Apr-2025	PS	163.07
3/10	WHO	Scenic Hotel Franz Josef Glacier	Douglas Wing Room includes Breakf...	10-Apr-2025	11-Apr-2025	PS	308.45
4/10	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	11-Apr-2025	13-Apr-2025	PS	347.87

2 Day Queenstown - Christchurch PCM



PCM NAME: 2 Day Queenstown - Christchurch | REFERENCE: 100028 | BASE DATE: 13-Apr-2025
AGENT: PKGBKG - Packages Debtor | CONSULTANT: Geoff | STATUS: Package

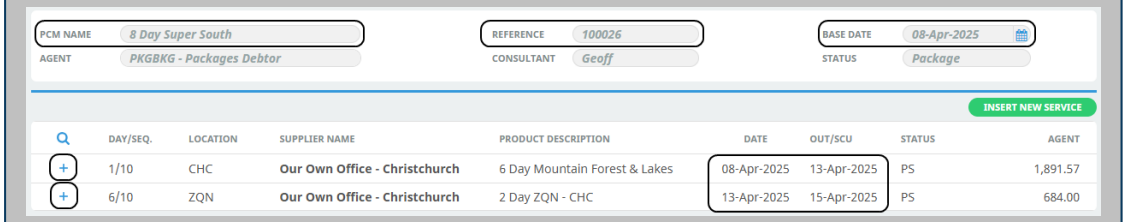
INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	ZQN	Pacific Tourways	Coach Charter	13-Apr-2025	1	PS	250.00
1/20	ZQN	Novotel Queenstown Lakeside Hotel	Standard Room	13-Apr-2025	14-Apr-2025	PS	177.30
2/10	CHC	Novotel Christchurch	Superior Room	14-Apr-2025	15-Apr-2025	PS	182.78

The services in all 3 of the above PCM's are the services that are used by passengers on those particular tours.

8 Day Super South PCM - Collapsed

The 8 Day Super South tour is made up of two other components - the 6 Day Mountains Forest and Lakes and the 2 Day Queenstown - Christchurch.



PCM NAME: 8 Day Super South | REFERENCE: 100026 | BASE DATE: 08-Apr-2025
AGENT: PKGBKG - Packages Debtor | CONSULTANT: Geoff | STATUS: Package

INSERT NEW SERVICE

	DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
+	1/10	CHC	Our Own Office - Christchurch	6 Day Mountain Forest & Lakes	08-Apr-2025	13-Apr-2025	PS	1,891.57
+	6/10	ZQN	Our Own Office - Christchurch	2 Day ZQN - CHC	13-Apr-2025	15-Apr-2025	PS	684.00

In the screen shot above, the PCM Services are in a collapsed state. Clicking the + to the left of the Day/Sequence will display the expanded list of services.

8 Day Super South PCM - Expanded

PCM NAME: 8 Day Super South | REFERENCE: 100026 | BASE DATE: 08-Apr-2025
AGENT: PKGBKG - Packages Debtor | CONSULTANT: Geoff | STATUS: Package

INSERT NEW SERVICE

	DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
−	1/10	CHC	**Our Own Office - Christchurch**	6 Day Mountain Forest & Lakes	08-Apr-2025	13-Apr-2025	PS	
	1/20	CHC	**Pacific Tourways**	Coach Charter	08-Apr-2025	1	PS	420.00
	1/30	CHC	**Novotel Christchurch**	Superior Room	08-Apr-2025	09-Apr-2025	PS	218.51
	2/10	CHC	**KiwiRail Scenic**	TranzAlpine Train - Christchurch t...	09-Apr-2025	1	PS	215.60
	2/20	GMN	**Kingsgate Hotel Greymouth**	Superior Room	09-Apr-2025	10-Apr-2025	PS	228.37
	3/10	WHO	**Scenic Hotel Franz Josef Glacier**	Douglas Wing Room includes Bre...	10-Apr-2025	11-Apr-2025	PS	387.30
	4/10	ZQN	**Novotel Queenstown Lakeside ...**	Standard Room	11-Apr-2025	13-Apr-2025	PS	421.79
−	**6/10**	**ZQN**	**Our Own Office - Christchurch**	**2 Day ZQN - CHC**	**13-Apr-2025**	**15-Apr-2025**	**PS**	
	6/20	ZQN	**Pacific Tourways**	Coach Charter	13-Apr-2025	1	PS	250.00
	6/30	ZQN	**Novotel Queenstown Lakeside ...**	Standard Room	13-Apr-2025	14-Apr-2025	PS	251.22
	7/10	CHC	**Novotel Christchurch**	Superior Room	14-Apr-2025	15-Apr-2025	PS	182.78

To collapse the services back into the PCM's, click the **-** to the left of the Day/Sequence (alongside the Package PCM Names.)

- Whether the package services display by default in a collapsed or expanded state depends on the Package Product setup. See "Step 4 - Attach Package Products to PCM's" on page 101
- When the package(s) are collapsed, the total PCM Price displays. When the packages are in an expanded state, the individual service costs display. The costs are from the first pax range of the PCM(s).

12 Day Best of New Zealand - Collapsed

PCM NAME: 12 Day Best of New Zealand | REFERENCE: 100027 | BASE DATE: 04-Apr-2025
AGENT: PKGBKG - Packages Debtor | CONSULTANT: Geoff | STATUS: Package

INSERT NEW SERVICE

	DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
+	1/10	AKL	**Our Own Office - Christchurch**	4 Day Sails & Sulphur	04-Apr-2025	07-Apr-2025	PS	866.88
	4/10	NZL	**Air New Zealand Ltd**	Domestic Flight ROT - CHC	07-Apr-2025	1	PS	204.60
	4/20	CHC	**Novotel Christchurch**	Superior Room	07-Apr-2025	08-Apr-2025	PS	218.51
+	5/10	CHC	**Our Own Office - Christchurch**	6 Day Mountain Forest & Lakes	08-Apr-2025	13-Apr-2025	PS	1,891.57
+	10/10	ZQN	**Our Own Office - Christchurch**	2 Day ZQN - CHC	13-Apr-2025	15-Apr-2025	PS	684.00

12 Day Best of New Zealand - Expanded

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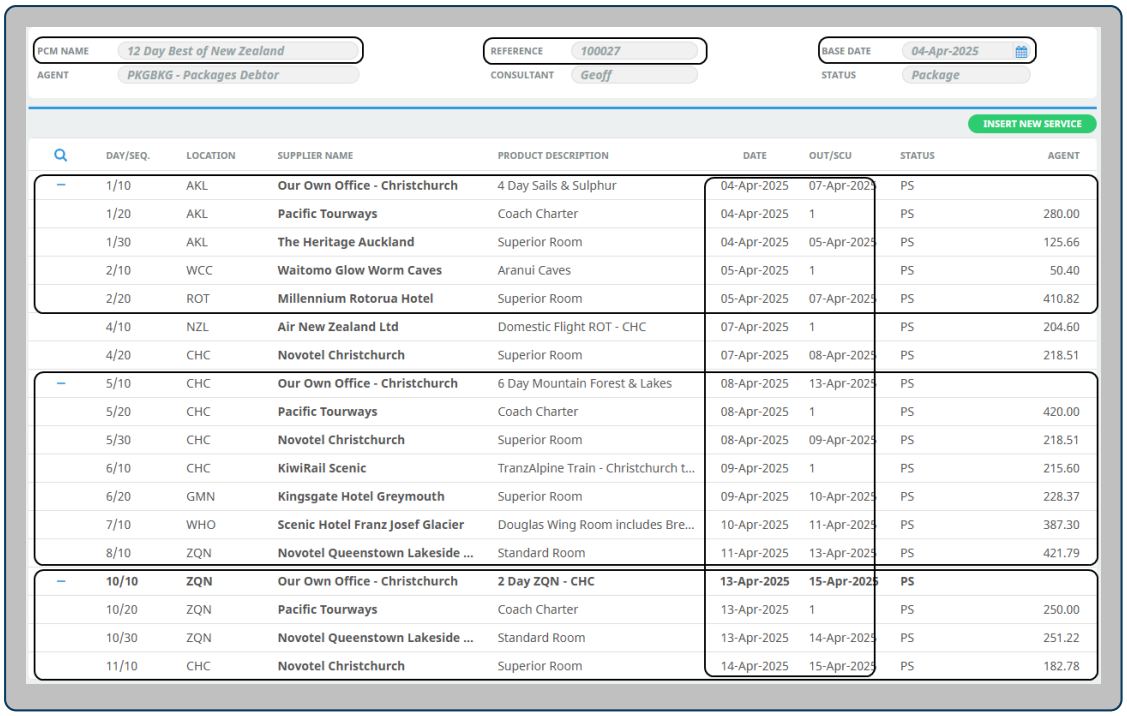

PCM NAME: 12 Day Best of New Zealand
AGENT: PKGBKG - Packages Debtor
REFERENCE: 100027
CONSULTANT: Geoff
BASE DATE: 04-Apr-2025
STATUS: Package

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	**Our Own Office - Christchurch**	4 Day Sails & Sulphur	04-Apr-2025	07-Apr-2025	PS	
1/20	AKL	**Pacific Tourways**	Coach Charter	04-Apr-2025	1	PS	280.00
1/30	AKL	**The Heritage Auckland**	Superior Room	04-Apr-2025	05-Apr-2025	PS	125.66
2/10	WCC	**Waitomo Glow Worm Caves**	Aranui Caves	05-Apr-2025	1	PS	50.40
2/20	ROT	**Millennium Rotorua Hotel**	Superior Room	05-Apr-2025	07-Apr-2025	PS	410.82
4/10	NZL	**Air New Zealand Ltd**	Domestic Flight ROT - CHC	07-Apr-2025	1	PS	204.60
4/20	CHC	**Novotel Christchurch**	Superior Room	07-Apr-2025	08-Apr-2025	PS	218.51
5/10	CHC	**Our Own Office - Christchurch**	6 Day Mountain Forest & Lakes	08-Apr-2025	13-Apr-2025	PS	
5/20	CHC	**Pacific Tourways**	Coach Charter	08-Apr-2025	1	PS	420.00
5/30	CHC	**Novotel Christchurch**	Superior Room	08-Apr-2025	09-Apr-2025	PS	218.51
6/10	CHC	**KiwiRail Scenic**	TranzAlpine Train - Christchurch t...	09-Apr-2025	1	PS	215.60
6/20	GMN	**Kingsgate Hotel Greymouth**	Superior Room	09-Apr-2025	10-Apr-2025	PS	228.37
7/10	WHO	**Scenic Hotel Franz Josef Glacier**	Douglas Wing Room includes Bre...	10-Apr-2025	11-Apr-2025	PS	387.30
8/10	ZQN	**Novotel Queenstown Lakeside ...**	Standard Room	11-Apr-2025	13-Apr-2025	PS	421.79
10/10	**ZQN**	**Our Own Office - Christchurch**	**2 Day ZQN - CHC**	**13-Apr-2025**	**15-Apr-2025**	**PS**	
10/20	ZQN	**Pacific Tourways**	Coach Charter	13-Apr-2025	1	PS	250.00
10/30	ZQN	**Novotel Queenstown Lakeside ...**	Standard Room	13-Apr-2025	14-Apr-2025	PS	251.22
11/10	CHC	**Novotel Christchurch**	Superior Room	14-Apr-2025	15-Apr-2025	PS	182.78

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Step 2 - Create Package Database Products

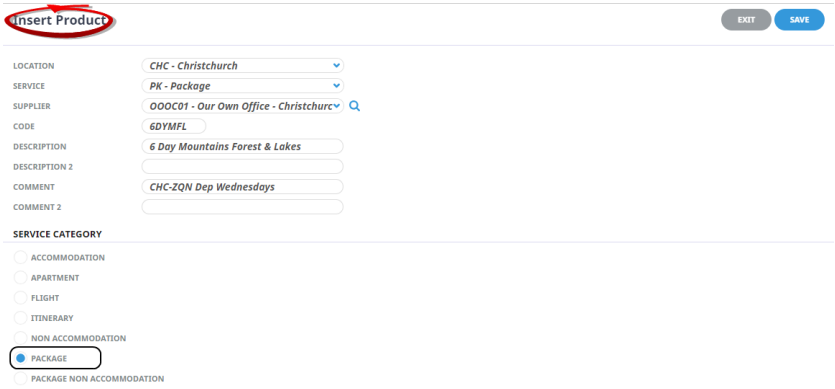
The Products which are going to be attached to Component PCM's to provide the package selling prices and seasons are created in the normal way in the Product Database. (See NX Product User Manual,Creating Products). There are several deviations from normal Product setup that need to be observed.

All (sub) component tours will need to have a package product created. The procedure below details entry for one of the component tours.

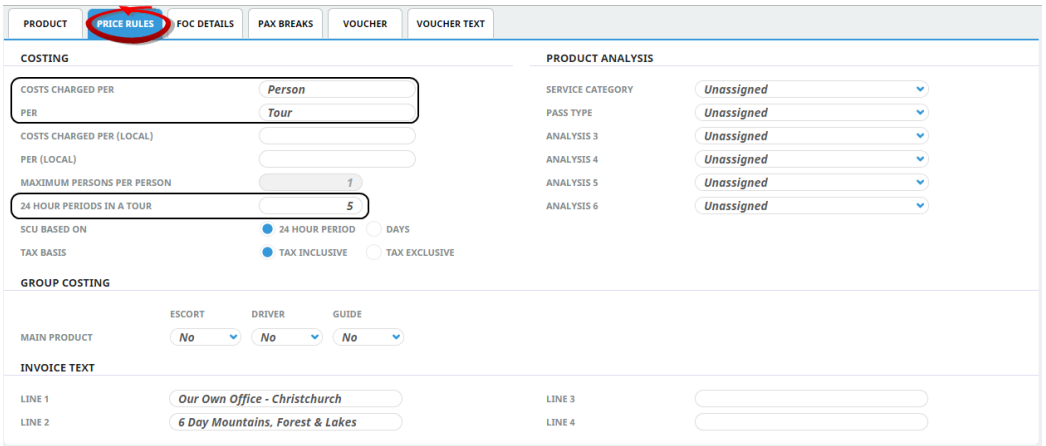
Creating the Package Price

1. The Service Category radio button *must* be **Package**.

   NOTE: If the incorrect category is selected, it can not be changed once the product has been used in a PCM or booking.



2. The First Charge Unit field *must* be **Person**.



   NOTE: Although this product is a 6 day tour, the value in the 'How Many 24 Hour Periods in a Tour' field is '5', not 6. This is because this field is used mostly to calculate accommodation 'Out' dates and as such, it doesn't count the 1st or 'In' day. This means that if this field has '6' in it, onscreen the duration would show as 7 days, not 6.

3. Unlike standard 'Non Accommodation' Products, Package Products allow the 'Room' and other **Policies** to be set if required.

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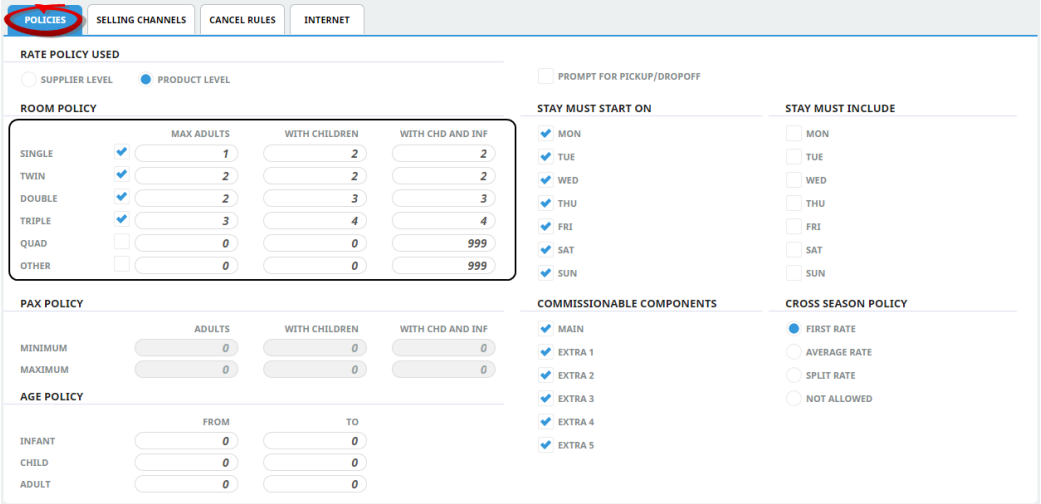
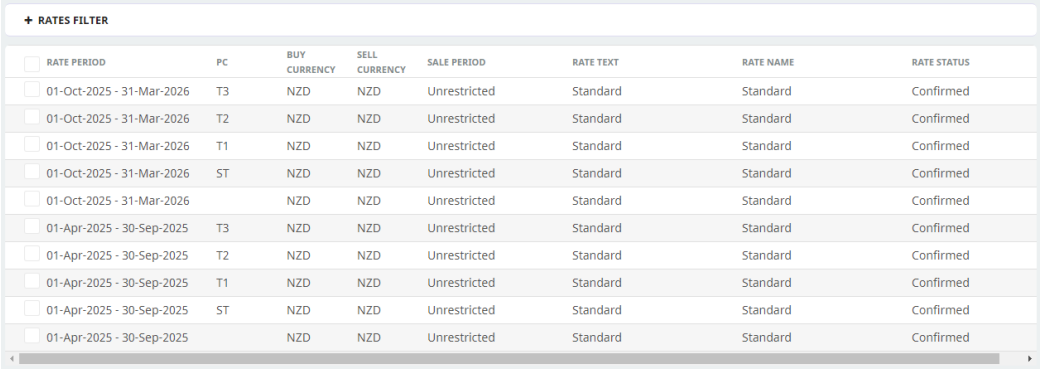


NOTE: Note - For a tour made up of several Component Products, the Policies must be consistent over all Package Products.

4. The **date ranges** in the Package Service Products are for the pricing seasons of the tour. This means that regardless of the base date of the PCM that the Product is attached to, up to date selling prices can be easily maintained at the Package Product level.



RATE PERIOD	PC	BUY CURRENCY	SELL CURRENCY	SALE PERIOD	RATE TEXT	RATE NAME	RATE STATUS
01-Oct-2025 - 31-Mar-2026	T3	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Oct-2025 - 31-Mar-2026	T2	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Oct-2025 - 31-Mar-2026	T1	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Oct-2025 - 31-Mar-2026	ST	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Oct-2025 - 31-Mar-2026		NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Apr-2025 - 30-Sep-2025	T3	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Apr-2025 - 30-Sep-2025	T2	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Apr-2025 - 30-Sep-2025	T1	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Apr-2025 - 30-Sep-2025	ST	NZD	NZD	Unrestricted	Standard	Standard	Confirmed
01-Apr-2025 - 30-Sep-2025		NZD	NZD	Unrestricted	Standard	Standard	Confirmed

Continue creating all product component tours, including rate entry.

Step 3 - Create Departure Dates & Availability

Departure dates and availability are created in the NX Product application. Full details on creating / modifying Allocations and availability dates are in the NX Product Manual, Adding a New Allocation.

Creating Tour Availability

1. Search for and retrieve the product created in "Step 2 - Create Product Package Price " on page 27.

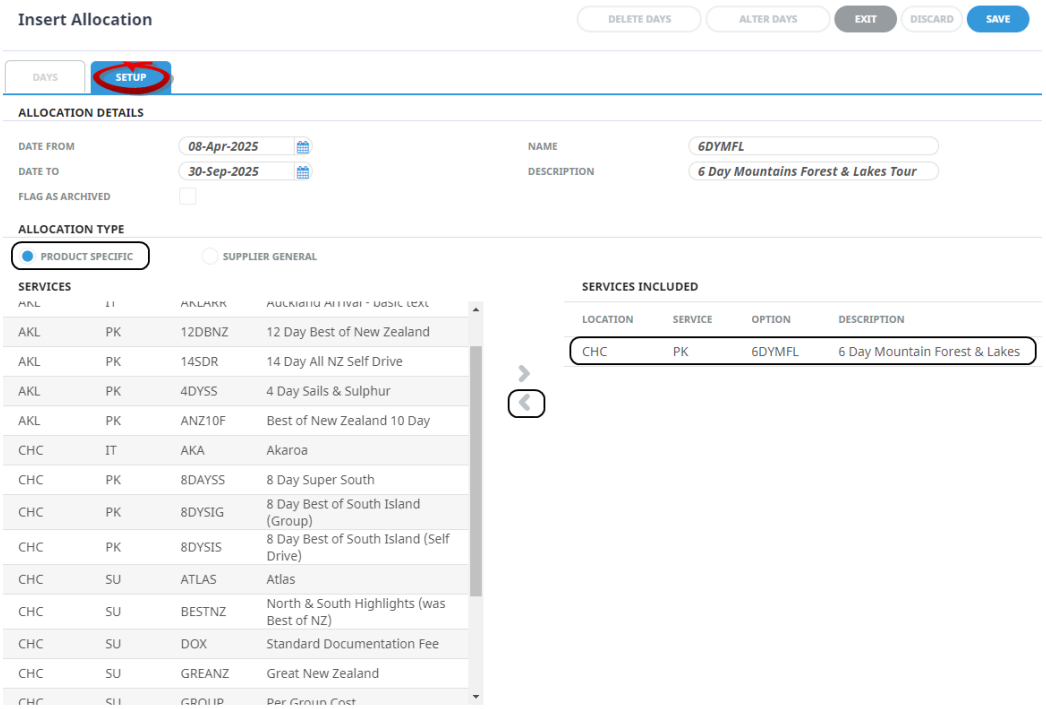
2. On the Product Setup screen, select menu **Product Setup > Supplier > Allocations**.

3. Click **Insert Allocation**.

   INSERT ALLOCATION

4. On the Insert Allocation screen **(Setup tab)**, do the following:
   - Set the From and To dates
   - Enter a Name and Description for this allocation
   - Make sure the Allocation Type selected is *Product Specific*
   - Scroll through the Services available until you find a match for services to include in this allocation - click the **right-hand arrowhead** to move the product under Services Included.

   NOTE: The Allocation *must* be specific to the Product.



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

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

7. If you click Save, the **Add Unit Type** screen displays automatically. Since the example is a Coach Tour, select *ST - Seat* in the drop-down Unit Type field. Also do the following:
   - Choose the departure days of the week for which this allocation applies (under Apply To)
   - Check all the Sub Allocations that will apply and set Max and Release values. In this example, the only sub allocation that applies is *GENERAL - General Allocation*.

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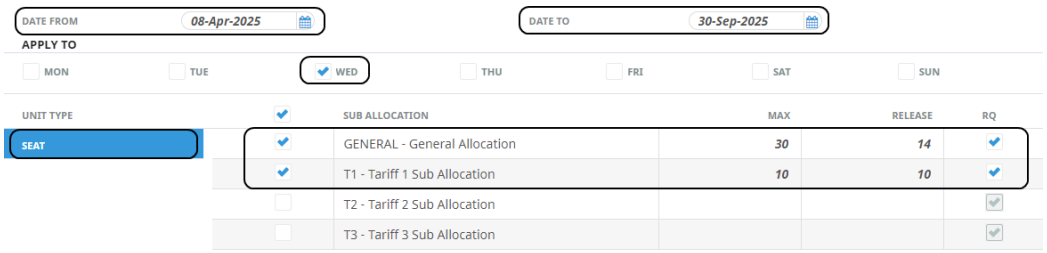
In the screen shot below, the Availability and Dates are being set up for the 6 Day Mountains, Forest & Lakes Tour for the period 08 April 2025 - 30 September 2025. The Tour departs every Wednesday, so the only 'Apply To' checkbox selected is Wednesday.

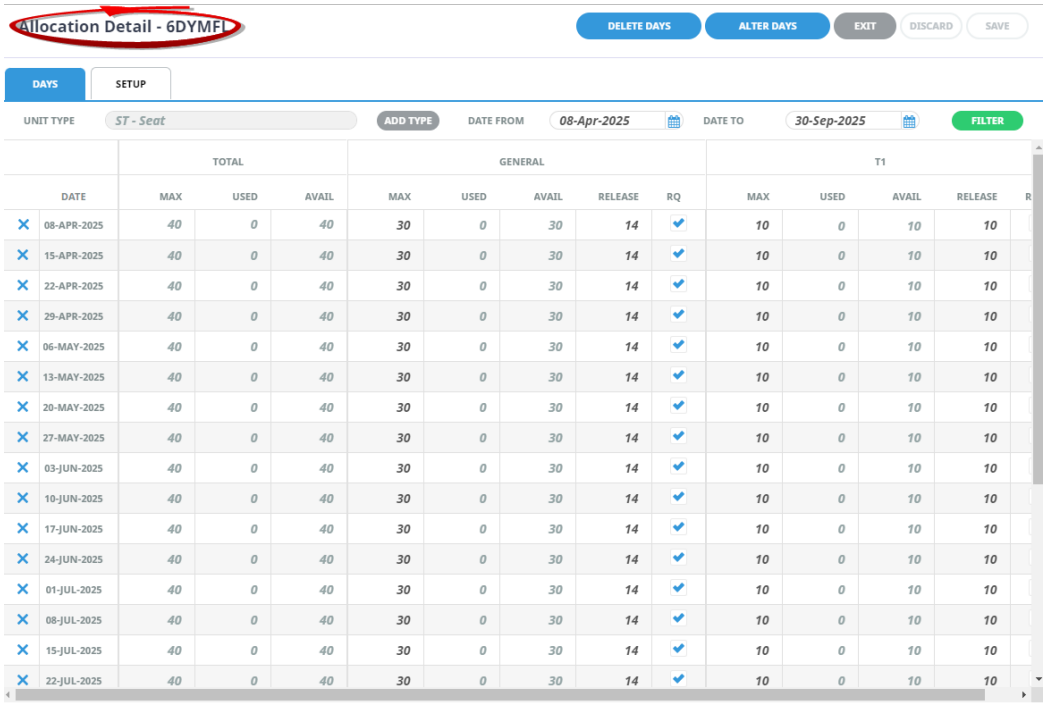
NOTE: Individual dates can be deleted and/or quantities and/or release dates edited once the allocation is saved to allow for some dates which may not have departures or limited availability etc.

If there are Seats available for specific Sub Allocations (Splits) then they can be included by selecting the required Sub Allocation(s) on the next line. Select a Unit Type which is Seat (not Room) based. Enter the Maximum seat and Release period values and whether the Tour will be available on request.



8. Click **Save** when done.

9. On the **Allocation Detail** screen, check that all departure days, quantities and allocation splits for the date range specified are accurate and complete.



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

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

12. Allocations will also be set up in the same configuration and quantities as above for:
    - 12 Day Best of N.Z.
    - 4 Day Sails & Sulphur
    - 2 Day ZQN - CHC
    - 8 Day Super South

Allocation Maintenance

Within an Allocation, you can:

1. View and Edit Allocations and identify which bookings are using them on a day-by-day basis (see "View or Edit Existing Allocations" on the facing page).
2. Remove or attach products that can use the allocation (see "Remove or Attach Subscribing Products" on page 95).
3. Extend or add additional date(s) (see "Extending or Adding to Allocations" on page 96).
4. If the supplier advises close outs or unavailability, or changes to release periods, this function can be used to change the values (see "Change Allocation Quantities / Release Period" on page 97).
5. Move allocations and sub allocations (see "Move Allocations Between Allocations and Sub-Allocations" on page 98).
6. Remove one or more allocations (see "Delete Allocations" on page 99).

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Retrieving an Existing Allocation

All allocation functions are accessed from the list of allocations currently available from a supplier/product combination, so the first task is to retrieve a list of existing allocations.

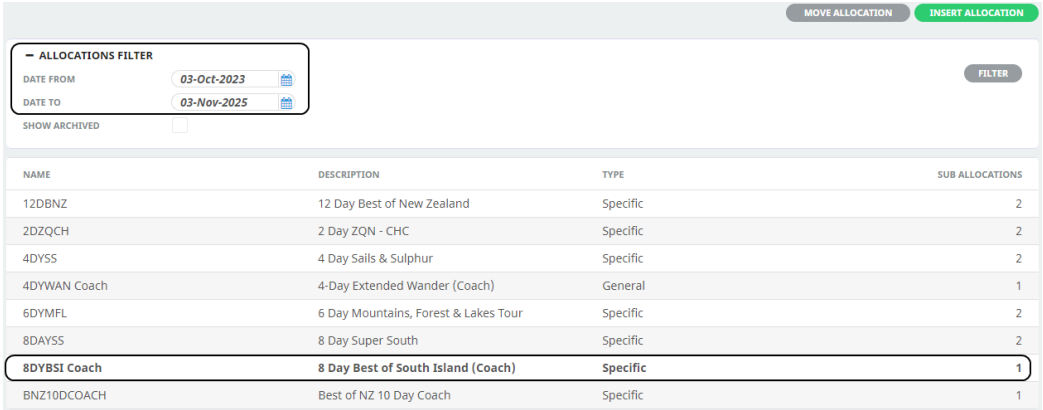
NOTE: More information about allocations and maintenance of allocations is covered in the Product User Manual - Allocations.

Retrieve an Allocation

1. Make sure at least one allocation exists for the supplier/product combination (see Adding a New Allocation).

2. From the **list of allocations**, click the one you want to work with to open it.

   NOTE: The most recently worked on allocation is highlighted allowing easy identification when maintaining allocations.



View or Edit Existing Allocations

1. "Retrieve an Allocation" above

2. Enter the affected date range in the Date From/Date To fields and click **Filter**.

   FILTER

   The records for the filtered dates will display or the default filter dates are set at *from* today's date *to* the same date next month.

3. Click on the Allocation to View.
4. The Allocation Detail screen with the Days Tab will open, view or edit the Max, Release and RQ columns, per Split Code, per day as in Adding a New Allocation.

   NOTE: If specific non-consecutive days need to have the values altered, this is the most practical way of doing it.

5. Check the **completed screen**.

6. Click **Exit** to discard any changes.
7. If changes were made to the allocation.

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

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

In addition, two buttons at the top of the screen allow a range of days to be Deleted or Altered.

NOTE: Individual dates can be deleted by clicking the **X** alongside each date within the days tab. Deletion confirmation is required.

Delete a Range of Dates

1. "Retrieve an Allocation" on the previous page

2. Enter the affected date range in the Date From/Date To fields and click **Filter**.

   FILTER

   The records for the filtered dates will display.

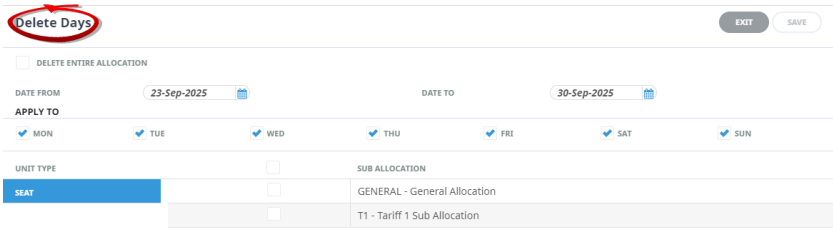
3. To delete the allocation for a particular day, click the blue **X** to the left of the Date column. Click as many lines as needed to delete a range of days.

   ✕

4. Alternatively, click **Delete Days** to specify a Date From and Date To range of days.

   DELETE DAYS

5. On the **Delete Days** screen, specify dates in the Date From and Date To fields, and make any other relevant selections in the Apply To and Sub-Allocation checkbox fields.



   The only fields that can be altered in this screen are the **From/To Dates**, **Day of Week** checkboxes and the **Sub-Allocation checkboxes** to select/de-select the days/Sub Allocations to be deleted.

   Two types of deletion can be done:

   a. Days can be deleted for all, or specific, days of the week; for all, or specific, sub allocations, within the filtered date range.
   b. The entire allocation can be deleted by checking the Delete Entire Allocation checkbox.

   > The Delete Entire Allocation checkbox ignores the dates selected and deletes the entire allocation. Allocations which have been used inside the deletion period dates are retained.

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

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

Alter a Range of Days

1. "Retrieve an Allocation" on the previous page

2. To Alter the range of days, click **Alter Days**.

   ALTER DAYS

3. On the **Alter Days** screen, specify dates in the Date From and Date To fields, and make any other relevant selections in the Apply To and Sub-Allocation checkbox fields.

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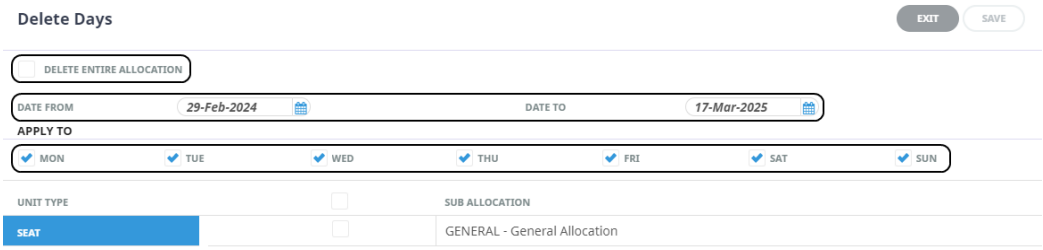


The fields that can be altered in this screen are:

- The From/To Dates
- Day of Week checkboxes
- The Sub-Allocation checkboxes (used to select/de-select the days/Sub Allocations to be deleted)
- Max, Release and RQ fields

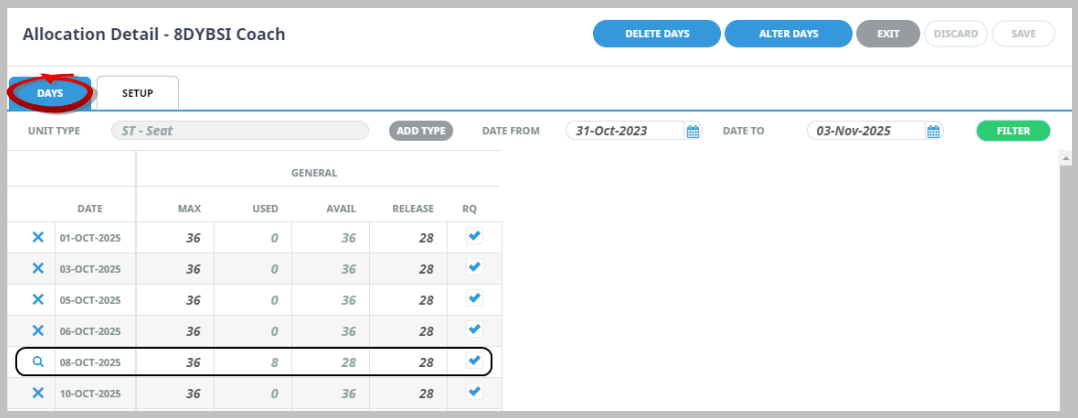
4. Click **Save** to keep the changes.

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

View Used Allocation Details

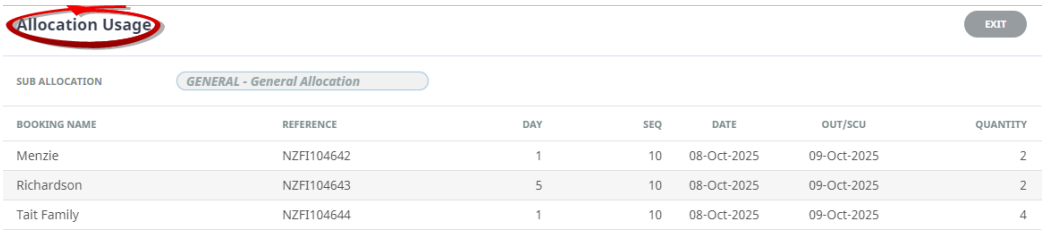
NOTE: Ensure the date that Bookings are to be viewed for is in the filtered range.

In the setup of the allocation for 8DYBSI Coach Allocation. The date of 08-OCT-2025 is highlighted to show the display of Used and Available seats etc. Seats have been taken from the allocation, and the three columns next to the date are the Max number of Seats, used Seats, and available number of Seats remaining.



1. Scroll to the required dates and click the **search icon** alongside the Allocation Date.

2. The Allocation Usage screen will display



The Booking Name, Reference, Day and Sequence of the service, together with the In Date and Quantity of units used are displayed.

NOTE: All data in this screen is view only and can not be edited. However, the booking reference can be copied and then pasted into a bookings application to retrieve the physical booking.

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Remove Attached Products

There may be instances where you need to remove an attached product, perhaps a particular room type is no longer available. Follow the procedure below to remove an attached product.

Remove or Attach Subscribing Products

1. To remove or add Products that are able to use the allocation, select the Allocation from the suppliers allocation list. See "Retrieve an Allocation" on page 91
2. The Allocation will open with the **Days tab** displaying.
3. Click the **Setup tab**.
4. The **Allocation Description**, **Allocation Type** and **Services Includedor excluded** can all be edited in this screen.

   If the Allocation Type is set to Product Specific and the type is changed to Supplier General, all products in the Services Included column will be removed.

5. To remove a product that is in the Services Included column, **highlight** it by clicking it and then click the **left arrow** ❮.

   NOTE: If a service is removed and no longer able to be used for the allocation, any existing allocations applying to that service will not be affected.

6. Click **Save** to keep the changes.
7. Click **Exit** to discard any changes.

Extending or Adding to Allocations

An Allocation can have it's dates extended. To do this, the 'Alter Days' function can be used.

NOTE: If allocations are offered on an annual basis, do not create a new allocation per year – simply extend the existing allocation.

Extend or Add to Allocations

1. Select the allocation to be extended and enter the dates it is to be extended From/To in the Date From/Date To fields and click the **Filter** button.

   FILTER

2. Click the **Alter Days** button.

   ALTER DAYS

The procedure for extending the allocation from this point on is exactly the same as setting up a new allocation. The Allocation Splits used in the original allocation default into the Alter Days screen.

Follow the steps shown in Adding a New Allocation.

NOTE: If the extended allocation does not appear in the scroll, check the Date From/Date To fields in the Allocation Header or Alter Dates screen to ensure that the newly extended dates are in the date range displayed.

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Change Allocation Quantities / Release Period

There are two methods of making changes to quantities:

1. Edit the cells individually.
2. Use the 'Alter Days' button.

Which method is used will depend on the scope of the changes required. If relatively minor changes are required – e.g., an occasional night closed out, then method 1 would probably be easier. If wholesale changes are required, then method 2 would be appropriate.

Example 1 – Edit Individual Cells

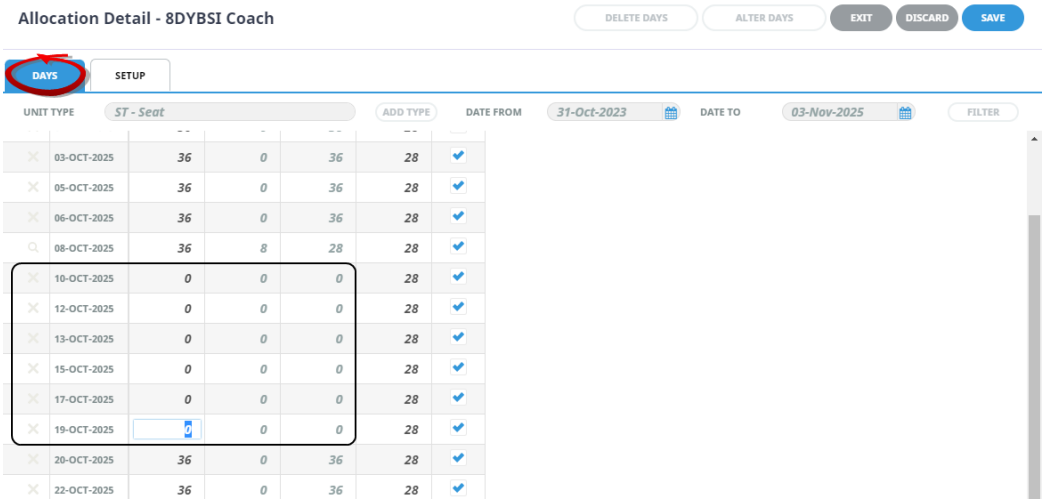
For the purposes of this example, the hotel has advised the allocation is closed out between 01 October and 20 October, and rooms will be available on request for some nights within that period.

There are two choices of method to achieve this:

a. Set the values in the cells to 0
b. Delete the lines for 01 October and 20 October

Method a. has been used and the allocation has been changed.

1. Edit the 'Max' fields so that all sub allocations will be 0.
2. The Release Days are set to 0 and the RQ checkboxes have been unchecked.



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

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

NOTE: The cells in the 'Total' column cannot be edited – only the sub-allocation cells are editable, and within those columns, only the 'Max' and 'Release' and 'RQ' cells can be edited. The Total column values do not update until the changes have been saved.

Delete Allocation by Individual Date

For method b. above, an individual allocation date can be deleted completely by clicking on the × button next to the date to be deleted.

NOTE: Dates can only be individually deleted - multiples can not be marked and then deleted. All sub allocations - GENERAL, T1, T2 etc are deleted for each date.

Move Allocations Between Allocations and Sub-Allocations

Again, there are 2 methods to do this.

NOTE: If only one allocation is set up on the system for a supplier with different Allocation Splits and a few individual days need to be moved around between sub allocations, then it is easier to reduce the amount on the sub-allocation and then increase the one being moved to. This is done by changing the Max column values in the split being taken from / given to. This is the same procedure as covered in Change Allocation Quantities / Release Period, "Example 1 – Edit Individual Cells" on the previous page.

1. To move more than one date at a time between Sub Allocations within the same allocation, use the 'Move Allocation' button.
2. To move numbers from one Allocation to another Allocation, click Move Allocation.

   NOTE: The same screen is used for both methods

   The exact number to be moved needs to be known – from which Allocation Split, to which Allocation Split. In the example, for the period 04/08 April, there are 6 rooms loaded against GENERAL Split (of which 4 have been used). The rooms being held against the T1, T2 & T3 splits, are going to be retained, because those rooms are likely to be used. 3 rooms are going to be moved from Small Grps QP allocation the FIT Allocation GENERAL split.

   NOTE: The system will not move rooms that it does not have. If one of the days in the date range specified if fully booked, no availability, then none will be transferred. Likewise selecting the 'All' checkbox will move all the available rooms for the dates selected.

   In the 'Move To' section, click in the row of the Allocation Name in the Move From section (Small Grps QP row) that the allocation is to be taken from and select the Allocation Name that the rooms are to be moved to (FIT Allocation). Click in the Sub-Allocation and Unit Type fields to reveal the drop downs and select Sub-Allocation name and Unit type to move to. Enter the quantity to be moved (or if it is All available to be moved, click the 'All' checkbox)

3. Click **Save** to keep the changes.
4. Click **Exit** to discard any changes.

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Delete Allocations

There are several methods to do this, depending on the deletion that is required:

1. Delete one Date only.
2. Delete a range of dates and/or Splits (Sub Allocations)
3. Delete the Allocation completely.
4. Archiving the Allocation

Example 1 – Delete Individual Date

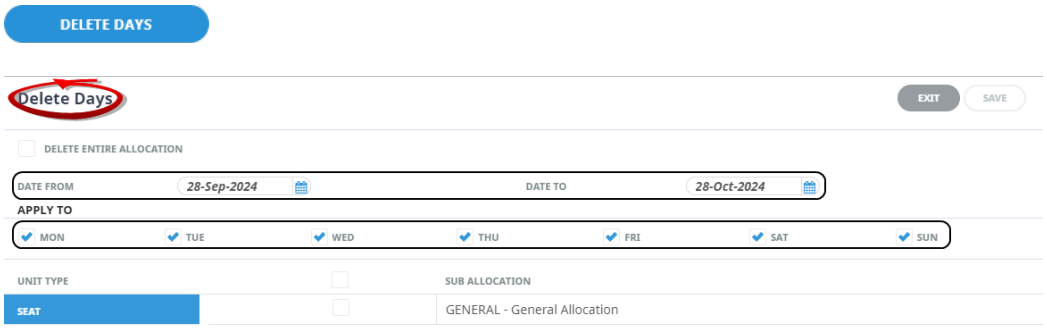
To delete one date only, click on the × on the left of the 'Date' column. Using this method will delete *all* Split Code (Sub Allocations) for the date selected.

Confirmation of deletion is required.

Example 2 – Delete Range of Dates and Sub Allocations

For the purposes of the example, the T2 and T3 Splits are to be deleted for the period 28 September - 28 October for everyday, to delete specific days unselect the required days of the week.

1. Set the date filters and click the Delete Days button.



2. Set the **Date From** and **Date To** fields as required.

   NOTE: If only specific days are to be deleted, uncheck the days that are *not* to be deleted.

3. Check the check-box(es) on the rows of the Sub-Allocation(s) to be deleted.

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

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

Example 3 – Delete Complete Allocation

1. Select **Delete Entire Allocation** check box.

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

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

NOTE: Only unused allocations will be deleted. Any dates where allocation has been used will remain. If the Unit Type still displays in the side bar after the deletion has completed, it means that there are used allocations for the unit type remaining. The date criteria may need to be widened to locate them.

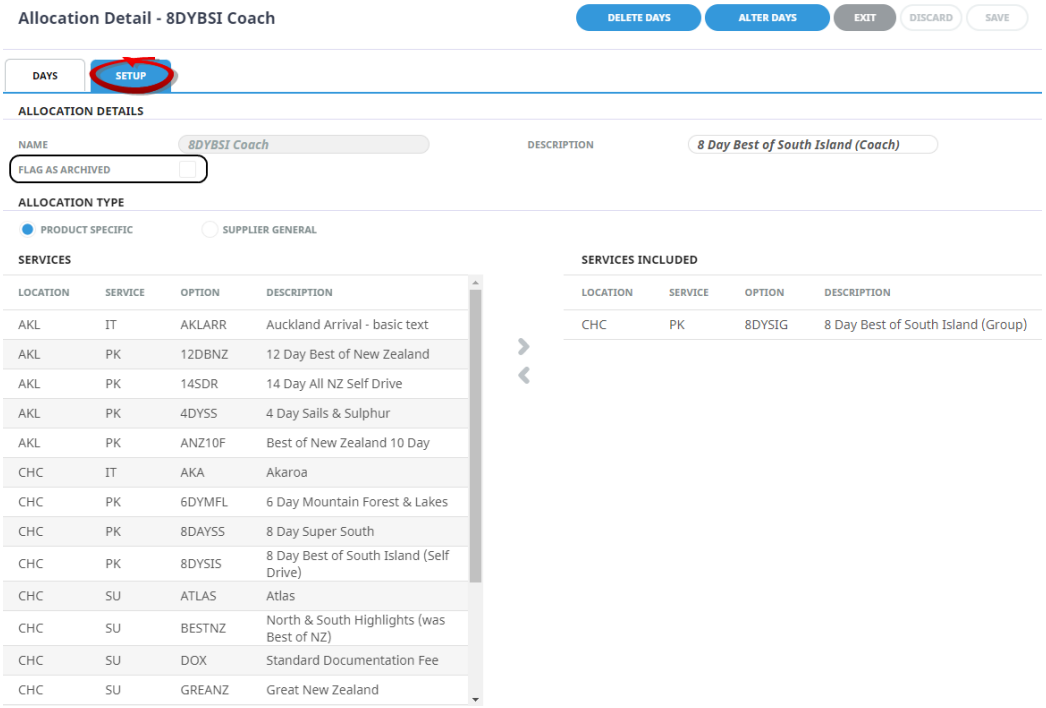
NOTE: This deletion process ignores any dates which may be in the Date From / Date To fields.

Archiving Allocations

This functionality allows existing allocations to remain in place, however the allocation will no longer be able to be sold in bookings. This function is the same as marking a product as deleted where any financial transactions will remain in place. The product allocation will not be able to be sold and existing sold allocations will be able to be viewed.

Archiving an Allocation

1. Open the **Allocation**.
2. Click on the **Setup Tab**.
3. Select the **Flag as Archived** check box.



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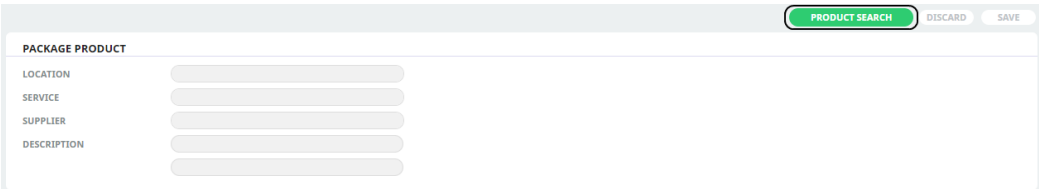
Step 4 - Attach Package Products to PCM's

The final stage of the set up process is to attach the Package Service Options to the relevant PCM's. This step also involves setting various parameters for the package.

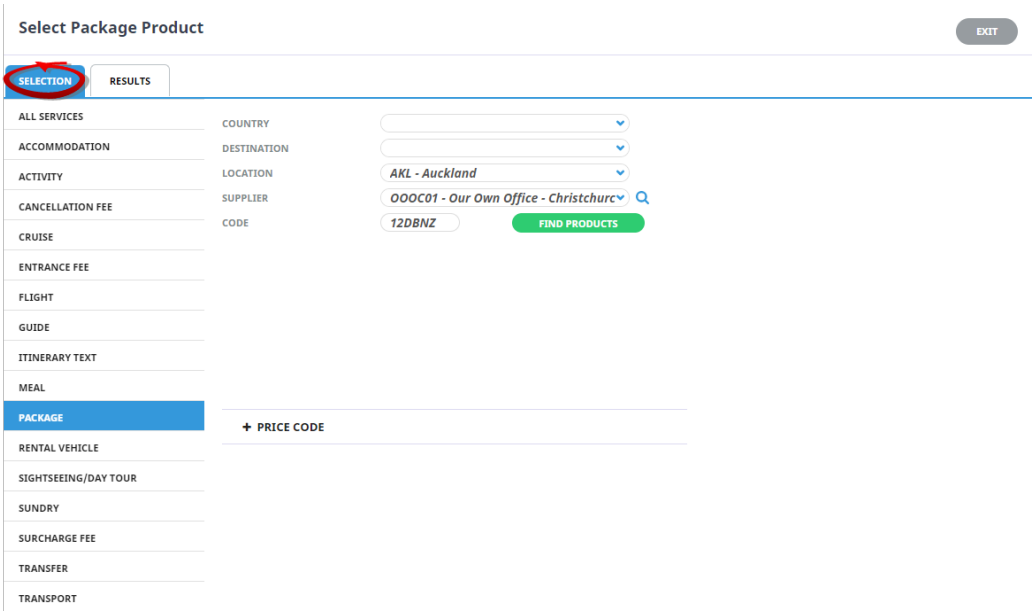
Attach the Package Price to the PCM

1. From the PCM application *(Main Menu, Bookings & Quotes, PCM Quotes)*. Find the PCM and on the Package Product screen, click **Product Search** to select the PCM that the database Package Product is to be attached to.
   From the Product Menu, select PCM Package Setup.



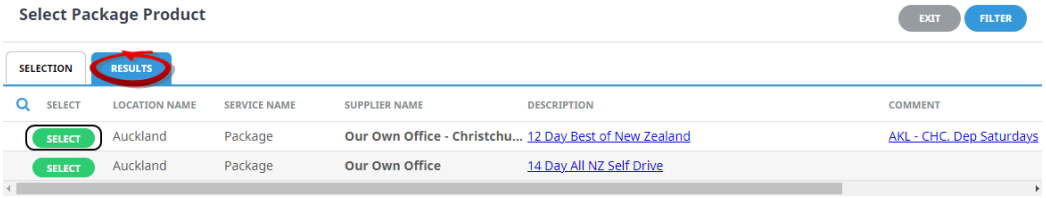
2. To attach the Package Product, click **Product Search**.

3. The standard Product Selection will display and the usual search criteria can be entered to select the **Package Product** to attach.

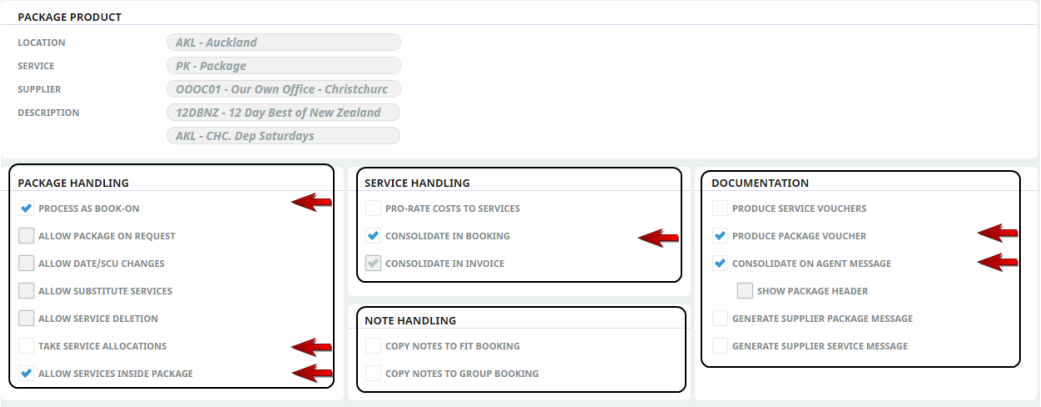


4. To continue, click **Find Products**.

5. Click **Select** to select the Product.



6. Once selected the **Package Product** screen will re-open for configuration of package handling settings.



NOTE: This screen is used to set the way the system handles both Self Drive/F.I.T. type packages and Group Scheduled Tours that F.I.T. passengers are booked on to. Various checkboxes become live once the Product is attached.

7. When selections have been made, click **Save**.

About the Package Product Fields

The check boxes in the Package Handling, Service Handling, Note Handling and Documentation sections are the basic configuration for Group Scheduled Tours. Those items marked ← are the items checked by default when this screen first displays and are the appropriate settings for Self Drive/F.I.T. type packages.

The check boxes determine how F.I.T. bookings for this particular Package Product will be processed:

- As a simple F.I.T. package tour or as F.I.T. bookings to be later 'Rolled-up' ('Booked-On') to Group Scheduled Tours for each departure date.
- What changes (if any) can be made to the PCM services at the time of entering the F.I.T. booking.
- Voucher production options.
- Service Handling in the F.I.T. Bookings, Invoicing and Itinerary production.
- Service messaging options.

NOTE: Those check boxes which are greyed out, are not available in conjunction with Group Scheduled Tours.

Process as Book on

This must be checked to allow FIT bookings for the Package Product to later be "rolled up" into Group bookings by departure date. See Tour Operations - Book On/Rolled Up Group Bookings.

Take Service Allocations

Checking this box will automatically take inventory from allocations (where available) as each FIT booking is made on the Tour. e.g. if the PCM contains an accommodation service which has allocation available for the date(s) being booked, then it will be taken.

NOTE: For Scheduled Group Tours, standard allocations would probably not be used in this way. If services have been pre booked for all series departures, then this flag should be unchecked. Pax numbers can be controlled by the allocation attached to each departure date.

Allow Services Inside Package

Checking this box will allow extra Service Products to be added to a booking within the dates defined for the Package. For example optional day tours may be offered which are not included in the package. This question does not apply to products added to an F.I.T. booking before the start and after the end dates of a Package e.g. pre and post accommodation.

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Pro-rate Costs To Services

Checking this box will pro-rate the Package Product sell price across all the PCM services in the FIT Bookings. For scheduled group tours, this box can be left unchecked.

Consolidate In Booking

This question determines how the package will be displayed in the FIT Booking Service List screen. Checking this box (the typical setting for scheduled tours) will display the package as one service line in the FIT booking. The individual package components can be viewed in an expanded or collapsed mode in the FIT booking by clicking the + and − icons next to the Package Product in the FIT Booking.

Leaving this box un-checked will display the package on the first line with the component services listed below in the FIT bookings.

Consolidate In Invoice

This check box is not available for Scheduled Group Tours. The check box determines if the invoice to the booking agent is able to display costs per service *or* the total Package price only. When the costs for a package are consolidated in a booking, it is not possible to then invoice the booking to the agent on a service by service (component) basis.

NOTE: Any services which are added to the booking which are external to the package (either within the days of the package as additional services or outside of the package) will display as separate lines on the invoice.

Invoicing message configuration can output a consolidated service line price for package headers if the consolidate invoice check box is checked.

Copy Notes to FITs Booking

If this box is checked, any notes which are attached to the PCM will be copied into the FITs Booking as the booking is created.

Copy Notes to Group Booking

If this box is checked, any notes which are attached to the PCM will be copied into the Group Booking as it is created.

Produce Service Vouchers

Checking this box will produce vouchers for each of the services in the package for each FIT booking entered in the FITs application.

NOTE: This box is NOT normally checked for Group Scheduled Tours.

Produce Package Voucher

Checking this box will produce one Package voucher for each FIT booking entered in the FITs application - basically a 'ticket' for the FIT booking passengers to join the tour.

Consolidate On Agent Messages

Checking this box outputs just one package service (the Package Product) on Agent messages e.g. a booking confirmation message.

Generate Supplier Package Message

Checking this box will enable message(s) to be sent to the supplier attached to the package product. This is generally internal, so there is no real need to have this checked. If a specific department in the company is responsible for operating the packages, then this box can be checked so that messages can be sent to that department.

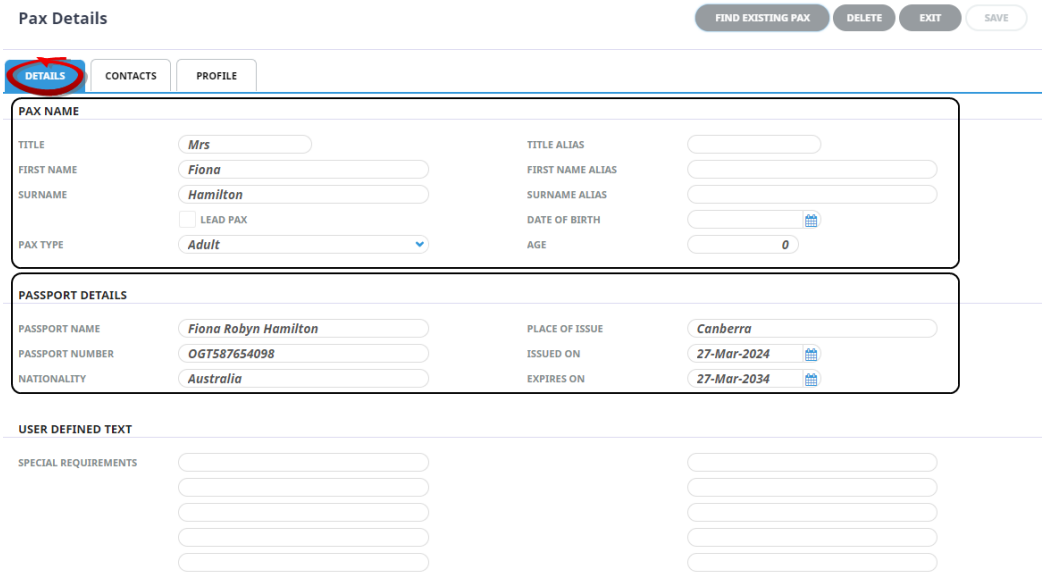
Generate Supplier Service Messages

For scheduled tours this must be left unchecked because supplier messages will be generated and sent from the 'Rolled-Up' group booking for each departure, rather than from the FIT bookings.

Understanding Tour Operations - F.I.T. Bookings

Passenger bookings are created in FITs in the usual way. There are some points to be aware of.

1. Depending on system INI settings, any **Pax Details** which are added in this screen will automatically be copied to the Rooms List in the Group Booking when it is created / updated. Similarly, any notes which have been added in any of the General Text fields regarding these pax will be copied into the Group departure rooming list Notes fields. Passport, Contact and Profile information - special diets etc - will also be copied to the Group booking. The information that is able to be captured is dependant on CRM and Profile settings in the system, as well as the Book On INI Settings.



2. The search for available packages is performed in the standard service line insert screen. Selection Tab and the results display in the Results Tab.

   The two items Price Code and New Configuration which are highlighted in Red on the Selections tab have a significant bearing on what results are displayed.

   - Selection Tab - **New Configuration**. The pax names may be displaying under New Configuration, but if the Room Type (e.g. **Double**) is not displayed it means that the Room Detail has not yet been saved and as such, the system can't display package details because it doesn't know which prices to obtain from the product database.

     Room detail not saving will occur if the Booking Header is created and possibly pax names added, but no services have been added using the room configuration. Any pax names entered during the initial booking entry will have been saved, the Room Configuration gets saved into the Service Lines and if there are not yet services in the booking, the configuration can not be saved.

     If the room configuration (i.e. Room Type - **Double**) does not display, click **New Configuration** to select the required Room Type and move the pax into it.

   - Selection Tab - **Price Code**.

     NOTE: This radio button selection list defaults to a collapsed state in this screen.

     The selection here determines which services will display based on the current setting. The default is determined by the INI setting OPTIONSCROLLPCRADIODEF which can on a per user basis.

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a. **All Price Codes**. Tourplan will display MULTIPLE lines per product, i.e. one line per price code. In effect, the system will show all products whether or not:

   i. The header price code is blank

   ii. The INI-setting USER_PRICECODE_OVERRIDE is used

   iii. The price codes are valid agent price codes.

b. **System Price Codes**. Tourplan will display ONE line per product based on whether or not the header price code is blank:

   i. If the header price code is “blank”, Tourplan will display products in the following order:

      i. With the price code from USER_PRICECODE_OVERRIDE INI-setting (if set)

      ii. With the first valid agent price code

      iii. With blank price code (whether or not “blank” is a valid agent price code)

   ii. If the header price code is NOT “blank”:

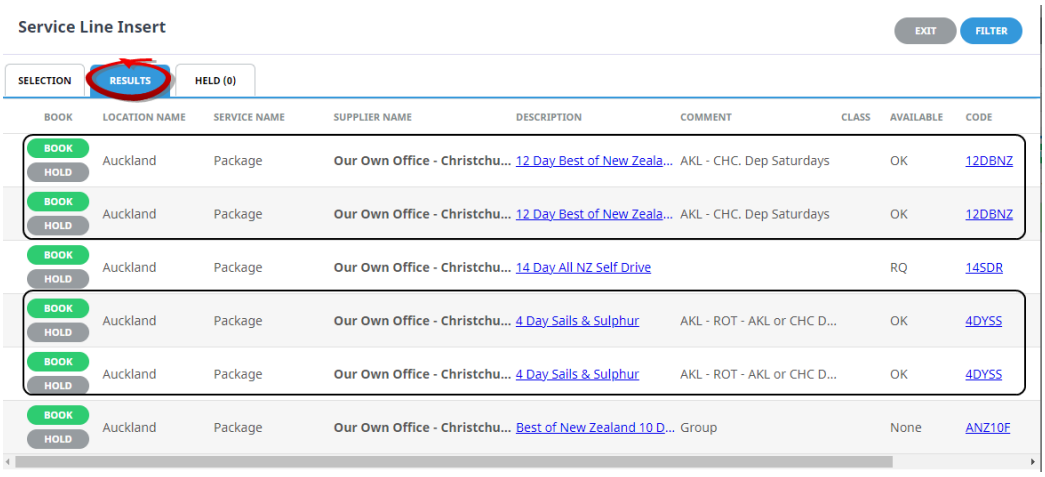
      i. Tourplan will display ONLY products that have the same price code as the header price code (whether or not the header price code is a valid agent price code).

c. **Selected Price Codes**. This setting works the same as OPTIONSCROLLPCRADIODEF = A. It is only used if all price codes are to be shown, but the ability to filter a specific price code needs to be retained.

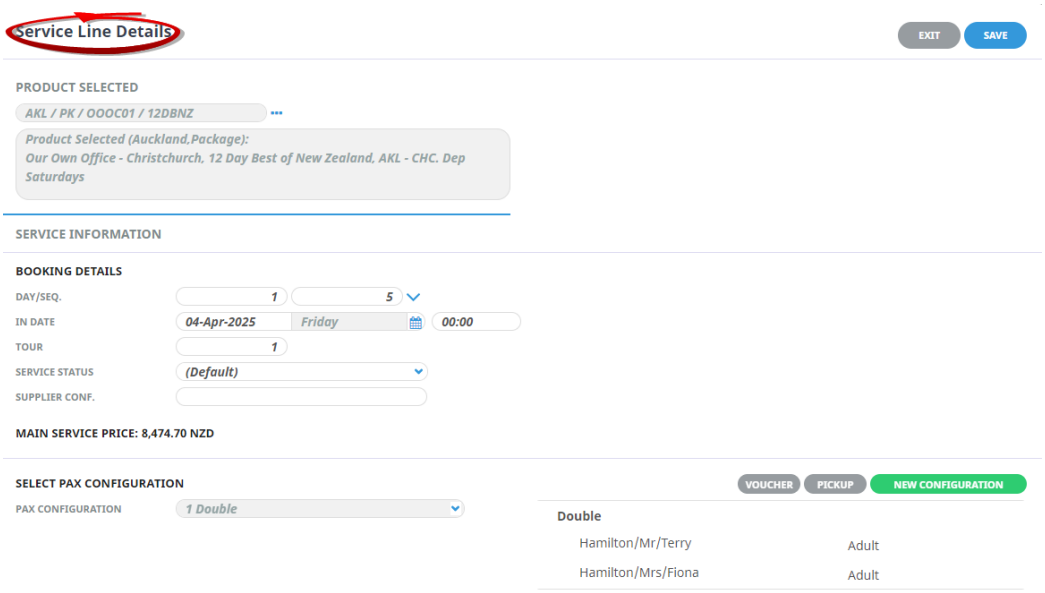
d. **Applicable Price Codes.** Tourplan will display MULTIPLE lines per product, i.e. one line for each applicable price code. Applicable price codes are the header price code + the price code used in INI-Setting USER_PRICECODE_OVERRIDE + all valid agent price codes.

   NOTE: The system being used for the examples in this document has the setting Applicable Price Codes which means the services will display once for each qualifying price code - i.e., if an agent has 2 price codes that qualify, the package option will display twice.

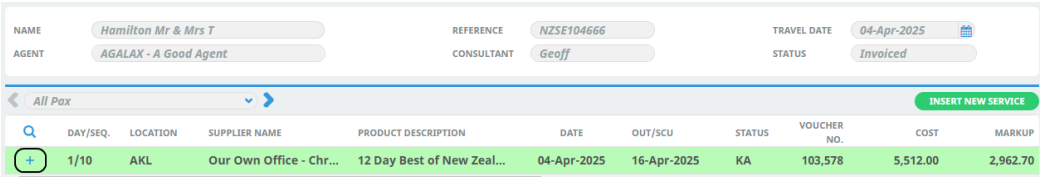
3. A list of package services display on the **results** screen.



4. When **Book** is clicked, the results screen closes and the **Service Line Details** screen is re-presented, populated with the appropriate data.

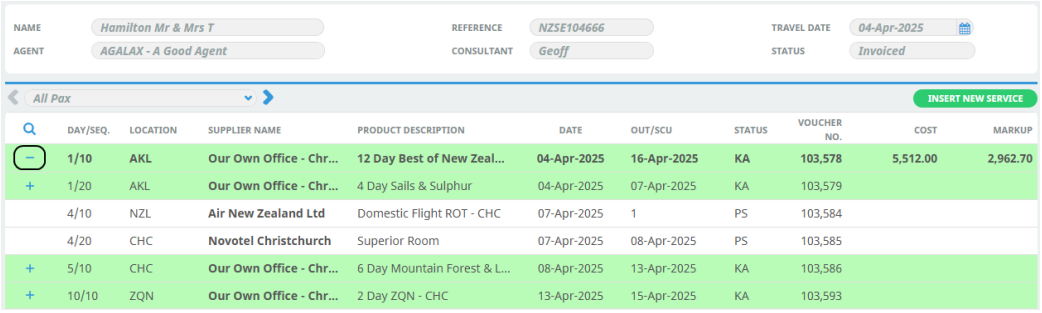


5. Click **Save** to keep the changes.
6. The Package service line is now inserted into the booking.



NOTE: The colour of the service line is determined by the Service Status, not because it's a package.

The screen shot above shows the service '12 Day Best of New Zealand' in a collapsed state in the booking. This is because the PCM/Package Product setting "Consolidate In Booking" on page 103 is checked. To view all services, click the + icon.



This screen shot shows the service '12 Day Best of New Zealand' in an expanded state in the booking. To collapse it again, click the − icon.

12 Day Best of New Zealand Tour

This particular tour (12 Day Best of New Zealand) is made up of three components (4 Day Sails & Sulphur, 6 Day Mountains, Forest & Lakes, 2 Day ZQN-CHC) and all are in a collapsed state when the PCM/Package Product setting '"Consolidate In Booking" on page 103' is checked. To expand them all, check the + icon next to each component line and to collapse them click the − icon next to each component line.

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NAME: Hamilton Mr & Mrs T
AGENT: AGALAX - A Good Agent
REFERENCE: NZSE104666
CONSULTANT: Geoff
TRAVEL DATE: 04-Apr-2025
STATUS: Invoiced

All Pax

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	VOUCHER NO.	COST	MARKU
1/10	AKL	Our Own Office - Chr...	12 Day Best of New Zealand	04-Apr-2025	16-Apr-2025	KA	103,578	5,512.00	2,962.7
1/20	AKL	Our Own Office - Chr...	4 Day Sails & Sulphur	04-Apr-2025	07-Apr-2025	KA	103,579		
1/30	AKL	Pacific Tourways	Coach Charter	04-Apr-2025	1	PS	103,580		
1/40	AKL	The Heritage Auckland	Superior Room	04-Apr-2025	05-Apr-2025	PS	103,581		
2/10	WCC	Waitomo Glow Worm...	Aranui Caves	05-Apr-2025	1	PS	103,582		
2/20	ROT	Millennium Rotorua ...	Superior Room	05-Apr-2025	07-Apr-2025	PS	103,583		
4/10	NZL	Air New Zealand Ltd	Domestic Flight ROT - CHC	07-Apr-2025	1	PS	103,584		
4/20	CHC	Novotel Christchurch	Superior Room	07-Apr-2025	08-Apr-2025	PS	103,585		
5/10	CHC	Our Own Office - Chr...	6 Day Mountain Forest & L...	08-Apr-2025	13-Apr-2025	KA	103,586		
5/20	CHC	Pacific Tourways	Coach Charter	08-Apr-2025	1	PS	103,587		
5/30	CHC	Novotel Christchurch	Superior Room	08-Apr-2025	09-Apr-2025	PS	103,588		
6/10	CHC	KiwiRail Scenic	TranzAlpine Train - Christc...	09-Apr-2025	1	PS	103,589		
6/20	GMN	Kingsgate Hotel Grey...	Superior Room	09-Apr-2025	10-Apr-2025	PS	103,590		
7/10	WHO	Scenic Hotel Franz Jo...	Douglas Wing Room inclu...	10-Apr-2025	11-Apr-2025	PS	103,591		
8/10	ZQN	Novotel Queenstown...	Standard Room	11-Apr-2025	13-Apr-2025	PS	103,592		
10/10	ZQN	Our Own Office - Chr...	2 Day ZQN - CHC	13-Apr-2025	15-Apr-2025	KA	103,593		
10/20	ZQN	Pacific Tourways	Coach Charter	13-Apr-2025	1	PS	103,594		
10/30	ZQN	Novotel Queenstown...	Standard Room	13-Apr-2025	14-Apr-2025	PS	103,595		

Processing of the FITs booking continues as with any other booking – invoices raised and vouchers issued etc. The settings in the PCM Package Product screen ("Step 4 - Attach Package Products to PCM's" on page 101) will determine the appearance of invoices and what vouchers are issued. The common scenario is for the Invoice to be consolidated and vouchers only for the component sectors to be issued.

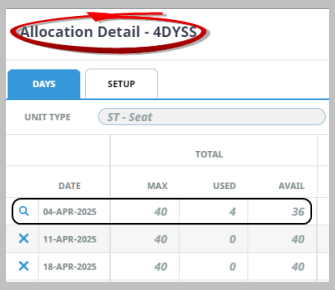
View Allocations

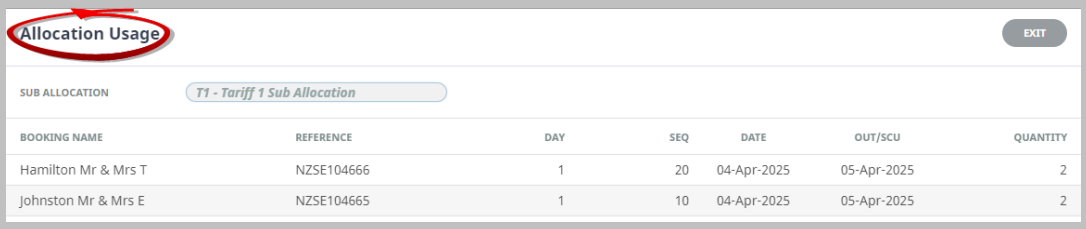
The screen shots below show the allocation status and bookings for each of the components that make up the 12 Day Best of N.Z. tour.

Once Component Tours have been selected in a booking the allocation units are used and the details of the used allocations can be viewed.

Search for the individual allocations and departure dates for each tour to see the allocations used. See "Step 4 - Set the Tour Departure Dates" on page 34

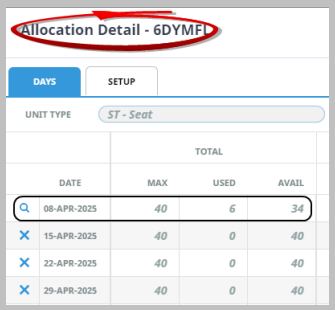
8 Day Super South Allocation

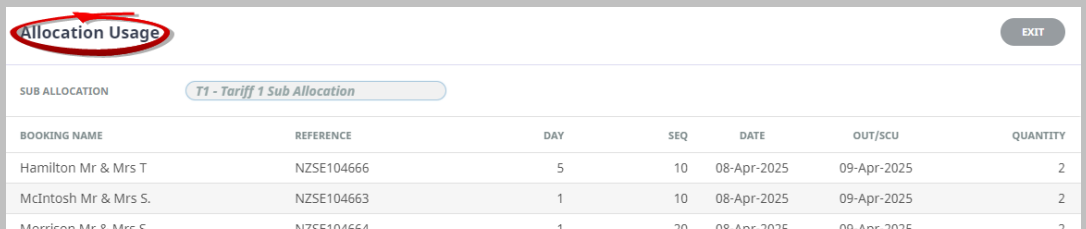




BOOKING NAME	REFERENCE	DAY	SEQ	DATE	OUT/SCU	QUANTITY
Hamilton Mr & Mrs T	NZSE104666	1	20	04-Apr-2025	05-Apr-2025	2
Johnston Mr & Mrs E	NZSE104665	1	10	04-Apr-2025	05-Apr-2025	2

6 Day Mountains Forests & Lakes Allocation





BOOKING NAME	REFERENCE	DAY	SEQ	DATE	OUT/SCU	QUANTITY
Hamilton Mr & Mrs T	NZSE104666	5	10	08-Apr-2025	09-Apr-2025	2
McIntosh Mr & Mrs S.	NZSE104663	1	10	08-Apr-2025	09-Apr-2025	2
Morrison Mr & Mrs S	NZSE104664	1	20	08-Apr-2025	09-Apr-2025	2

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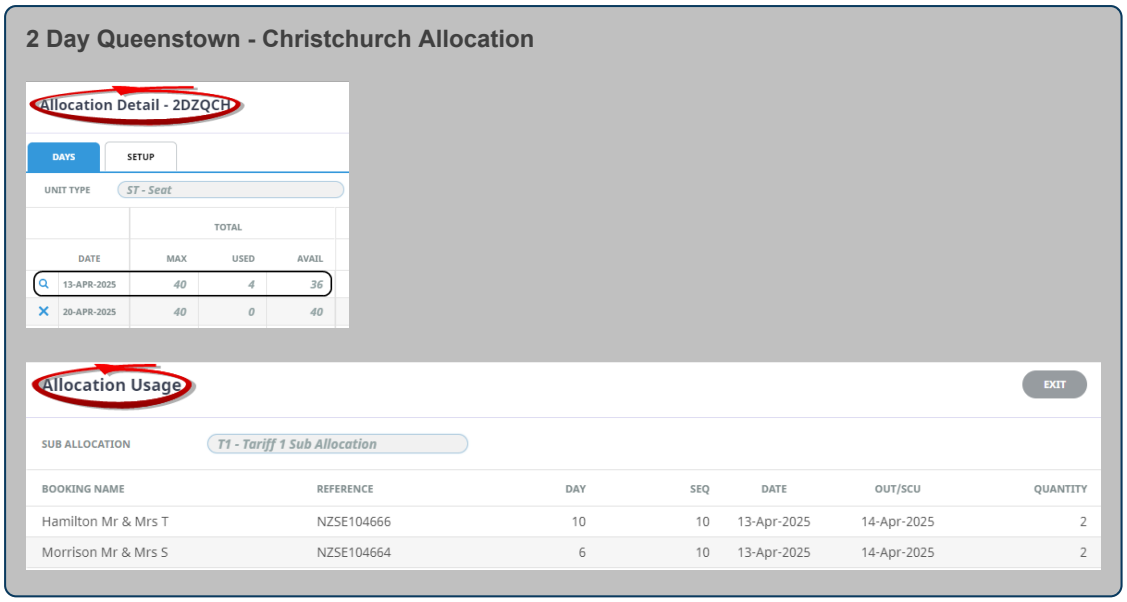

The detail screens for each allocation show the allocation date, the Maximum available, the Used amount and the balance available. Clicking the icon next to the date will display brief details of the bookings which are using each of the allocations.

It can be seen that the allocation dates that have been used tie up with the service dates of the component service lines. Allocations are taken from not only the Tour being booked, but also any affected components.

NOTE: services outside the packages – e.g. Pre and/or Post tour accommodation can also be included in the FIT Bookings.

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APPENDIX

Supporting Information

The appendix includes reference material and supporting information that supplements this document's chapters.

In this chapter ...

Appendix 1 - Scroll Column Headings 112

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.
2. On the **Set Column Defaults** screen, click a column heading label in the Available Columns list. The button will become live. Click the and the column name will move to the Table Columns List. Use the and buttons to move the column names into the required order. To remove a column from the Table Column list, highlight it and click the to return it to the Available Columns List.
3. The check boxes can be used to make a column bold. The width of columns can be adjusted in the Width column.
4. Click **Save** to keep the changes.
5. The list is immediately updated to reflect the new defaults chosen.

PCM Markup Commission Columns

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" above.

Bookings and Quotes > PCM Quotes > PCM Details > Markup/Commission

Column Heading	Description
* Date	The date of the service.
Day/Seq	Day and sequence of 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 from the product database.
* (Cost) Markup	The sum of all markup on the service, including Database, Matrix and PCM Markup.
* (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 PCM markup).
* (Retail) Comm	The value of any agent commission (commission being paid to the debtor/agent attached to the PCM), 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.

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PCM Itinerary 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 > PCM Quotes> 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.
*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.
Rate Text 2	Product database Date Range/Details Screen rate text 2. A second field to display an additional/alternative rate text.

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Column Heading	Description
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 112.

Bookings and Quotes > PCM Quotes > 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.
*Service Name	Service (i.e. product) full description.
Supplier	The service supplier code.

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Column Heading	Description
*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).

Communications Columns

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on page 112.

Bookings and Quotes > PCM Quotes > Operations > 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 > PCM Quotes > Operations > 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).

* indicates a column in the default view. To change default column headings, see "Change Default Column Headings" on page 112.

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