TOURPLAN

PCM Quotes 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 Quotes

PCM is an acronym for 'Pre-Costed Module'. The PCM application is designed for the following uses:

1. **Quotations** - create ad-hoc Group or FIT quotes, either for immediate inclusion in bookings or as templates for subsequent use.
2. **Modules** - create groupings of frequently used products that can be easily inserted into bookings or quotations without re-entering all of the service detail.
3. **Packages** - create collections of products that together have a fixed selling price as packages that can be sold from the FITs module.

This document describes the first two uses; Quotations and Modules. Packages are covered in the PCM Packages User Manual .

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

About the User Manuals

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

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

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

User Manuals are available when logged into MyTourplan.

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

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

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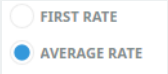
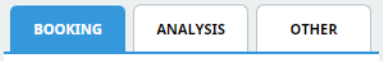
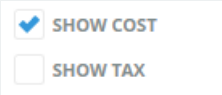
Getting Started With Tourplan NX

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

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

Tourplan NX Application Conventions

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

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

About the Tourplan-NX Menu

The Hamburger Menu

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

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

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

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

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

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

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

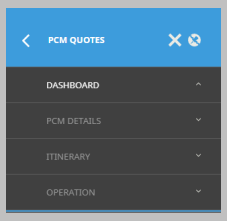
Menu Changes with Selections

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

Example: PCM Quotes Menu

Bookings and Quotes > PCM Quotes

The menu view once aPCM Quote is selected or created:



Menu Breadcrumb Trails

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

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

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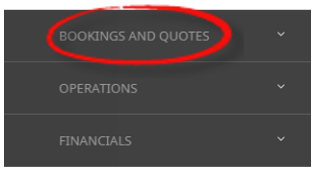
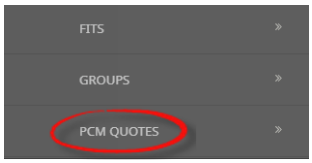
2. Click the **Bookings and Quotes** menu option to expand it:



3. Click **PCM Quotes** to open the PCM Quotes screen:



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

About Quick Links

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

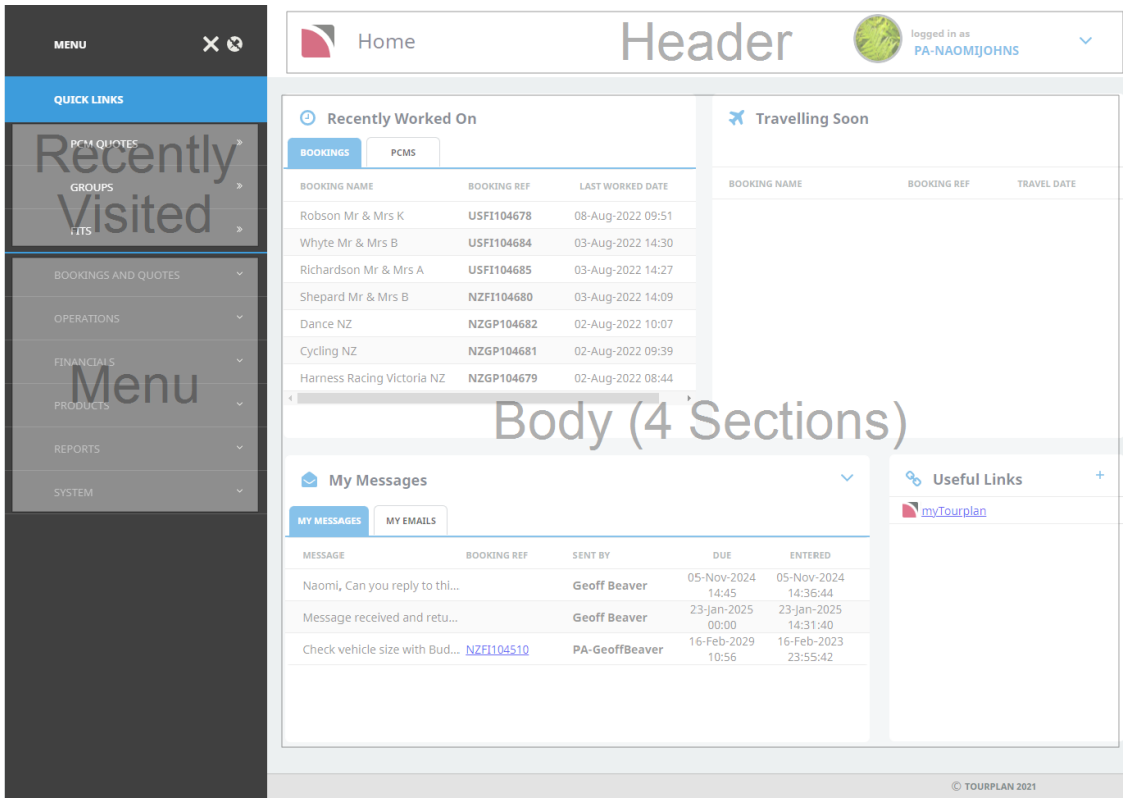
About the Landing Page

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

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

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

Landing Page Sections



About the Landing Page Sections

Recently Worked On

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

Travelling Soon

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

My Messages

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

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

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

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

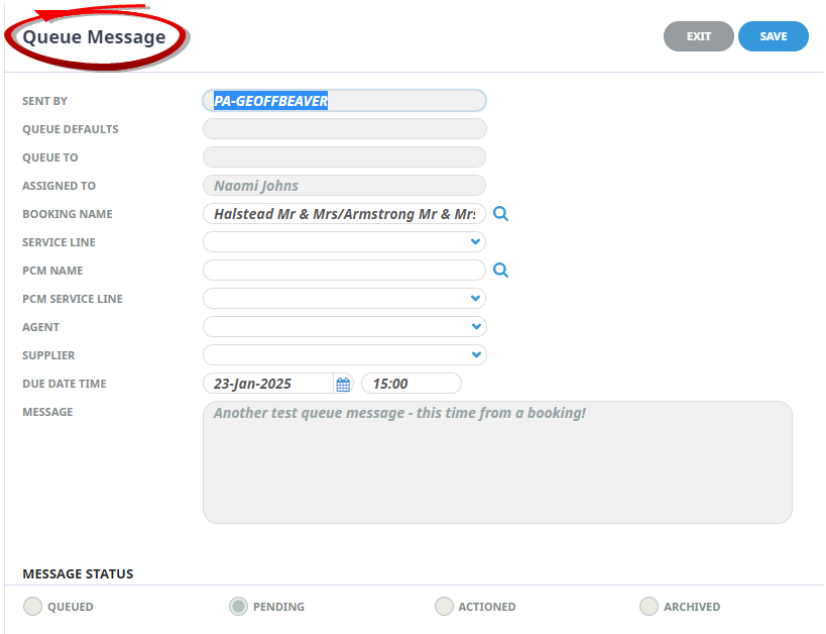
Bookings can be opened from the dashboard and the received message replied to from within the booking.

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

Respond to a Message in My Messages

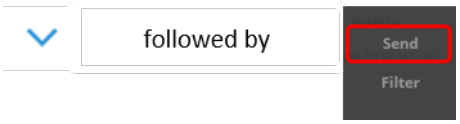
Messages can be responded to and the message status updated.

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

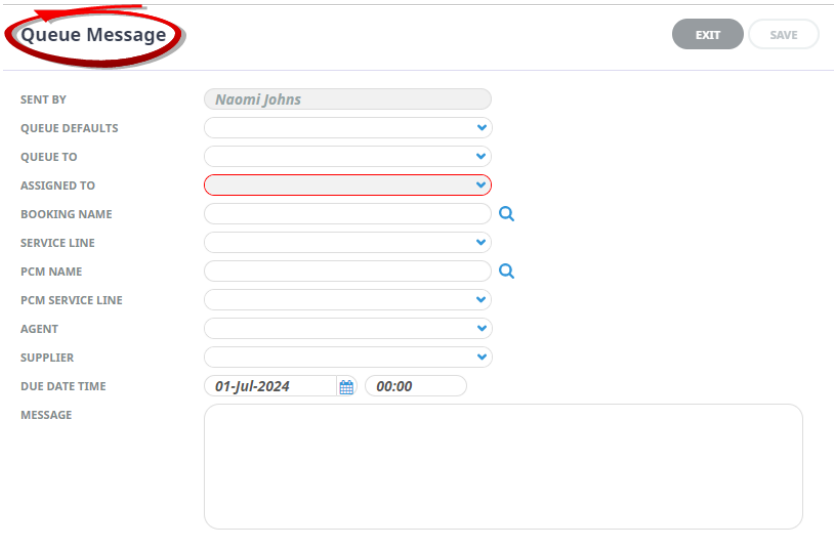


2. Modify any fields that might need updating and click **Save**.

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

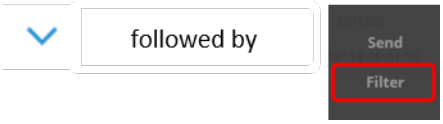


4. On the new **Queue Message** screen, assign an internal queue message to one or more colleagues. The message can identify a specific booking/PCM, Agent or Supplier for reference.

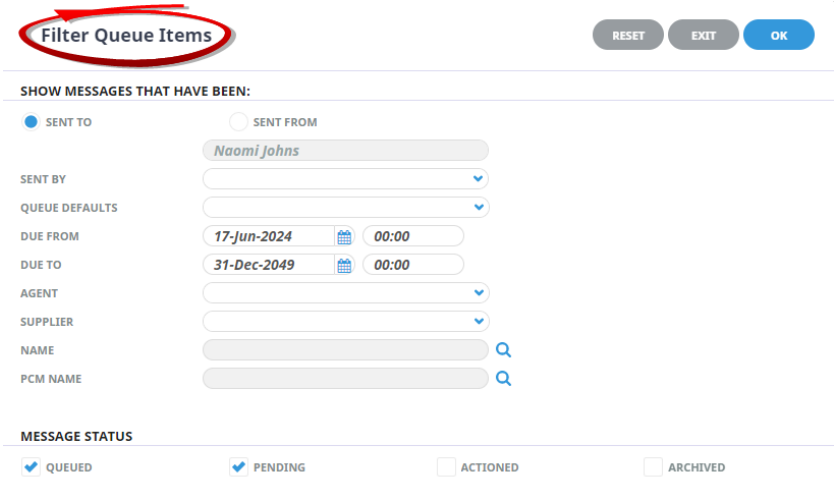


5. Click **Save** to send the message.

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



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



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

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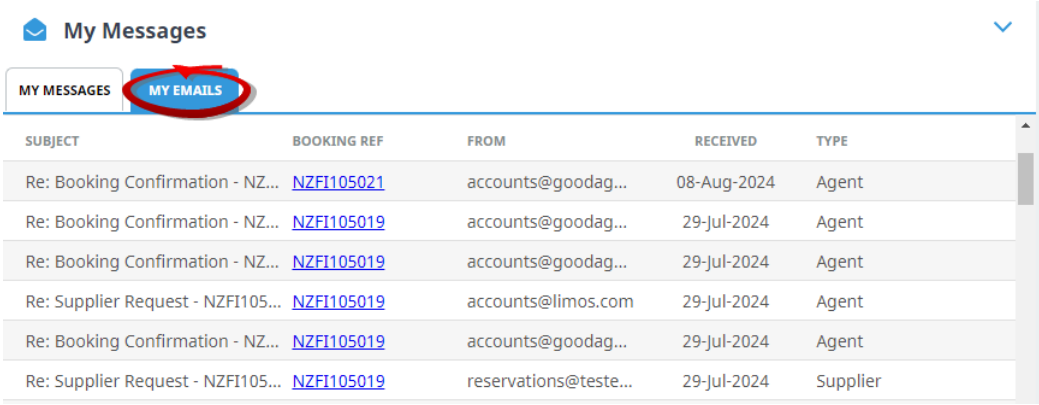
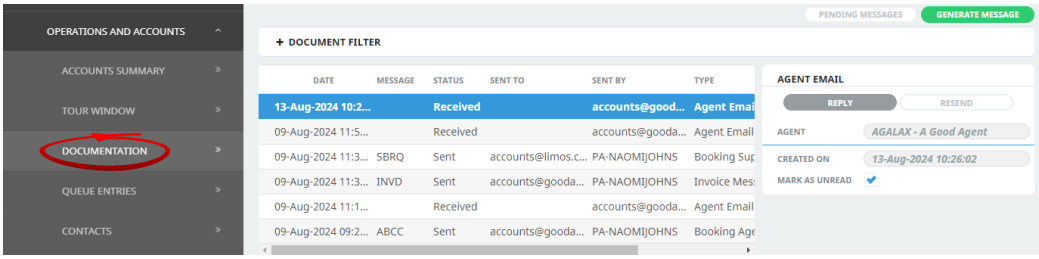
View Received Emails & Open Booking

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



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

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



Useful Links

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

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

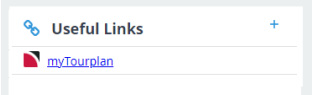
A number sequence provides the order the URL Name will display on the Dashboard.

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

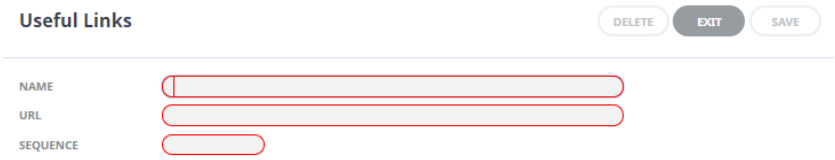
If the user no longer wants the URL to display a Useful Link can be removed from the Code Setup application. A System Administrator with access to Code Setup can change or remove a URL.

Add a Useful Link from the Dashboard

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



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



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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.

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

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

Per Person Pricing	Cost	Comment
Triple Reduction	$20.00	$100pp half twin less $20pp triple reduction = $80 x 3 = $240

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Adding PCM Code Data

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

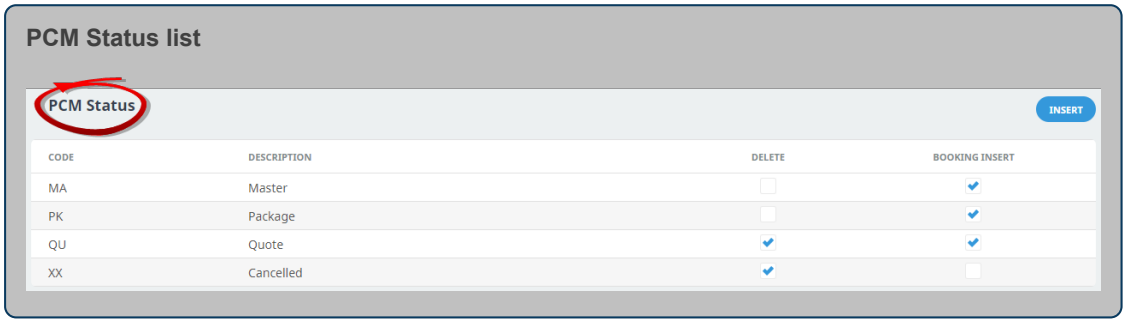
- PCM Status Codes:
- PCM Consultants:

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

PCM Status Codes

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.



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.

Quick Steps

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

1. Getting Started with PCM Quotes:
   a. Document Conventions
   b. "About the Tourplan-NX Menu" on page 10
   c. "Adding PCM Code Data" above
2. Creating New PCMs:
   a. "Create a PCM " on page 23
   b. "Add Services to a PCM" on page 31
   c. "Manual/Edited Pricing" on page 44
3. Managing Existing PCMs:
   a. "View Existing PCMs" on page 53
   b. "Retrieve an Existing PCM" on page 50
   c. "Working with PCM Details" on page 57
   d. "Working with PCM Itineraries" on page 77
   e. "Working with PCM Operations" on page 107

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CHAPTER 2

Creating New PCMs

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

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

The first step covers entering basic details, such as PCM name, base date and PCM status, while the second step describes how to add services to the PCM, such as accommodation, transfers and sightseeing tours.

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TOURPLAN

An Example PCM Quote

The Dashboard View of a typical PCM is shown. There are two tabs available in Dashboard View - the default is the *Pax Ranges* tab:

Completed PCM - Dashboard View (Pax Ranges tab)

DELETE EXIT

PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

Child/Infant Rates from Pax Range: 10 + 1

From a services point of view, the Itinerary View is more useful:

Completed PCM - Itinerary View

PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	SERVICE
1/10	AKL	**Johnstons Scenic Coachlines**	International Airport - City	25-Mar-2024	1	QO	37.40	TR
1/20	AKL	**Citylife Auckland**	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75	AC
4/10	AKL	**Johnstons Coachlines**	Coach Charter	28-Mar-2024	1	QO	180.00	TR
4/20	PIH	**Copthorne Bay Of Islands Hotel**	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00	AC
6/10	PIH	**Fullers Great Sights Bay of Islan...**	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42	CR
6/20	PIH	**Waitangi National Trust**	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57	EF
7/10	PIH	**Fullers Great Sights Bay of Islan...**	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25	SS
8/10	AKL	**Citylife Auckland**	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84	AC

What next?

The following tasks describe how to create a PCM that looks like the example above:

1. "Create a PCM " on the facing page
2. "Add Services to a PCM" on page 31

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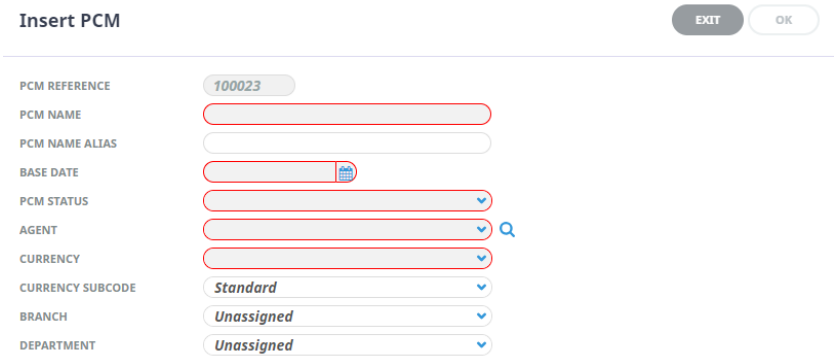
Create a PCM

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

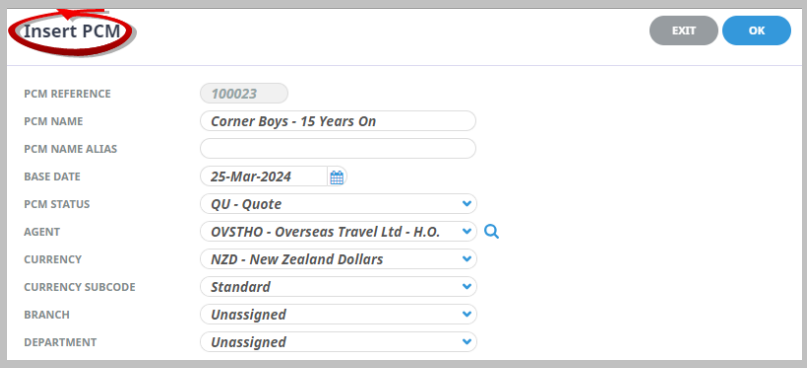
Create a PCM

1. Click **Insert New PCM**.

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



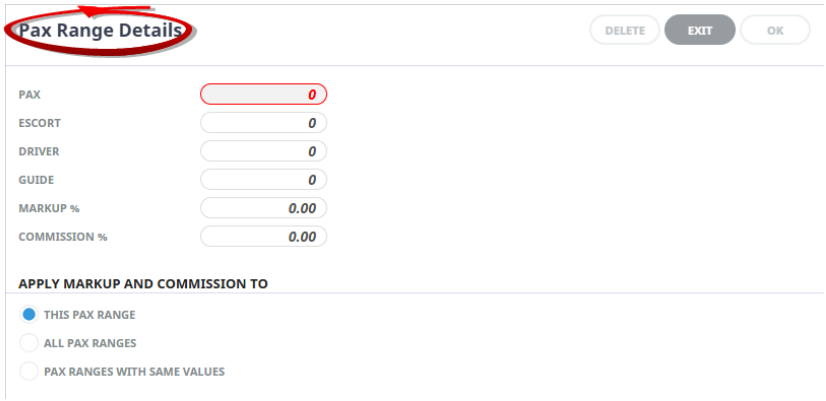
This example shows a PCM named **Corner Boys - 15 Years On**.



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

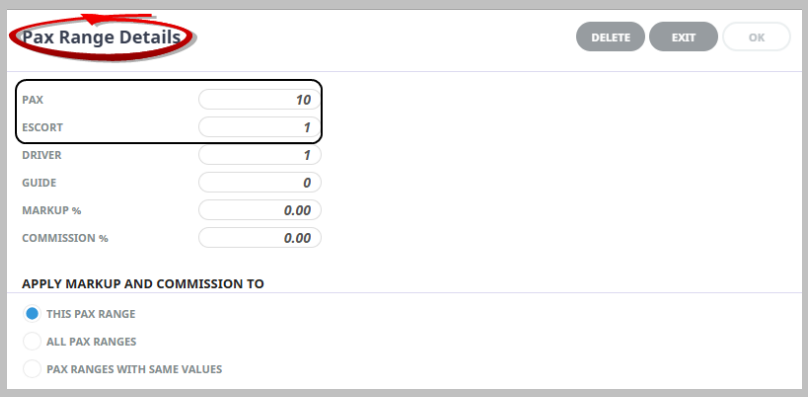
4. Click **Exit** to discard any changes.

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



6. 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 *10 + 1* (this is the label given by Tourplan-NX when viewed in the PCM Details, General Setup screen (Pax Ranges tab), indicating *10 Pax 1 Escort*and *1 Driver*).



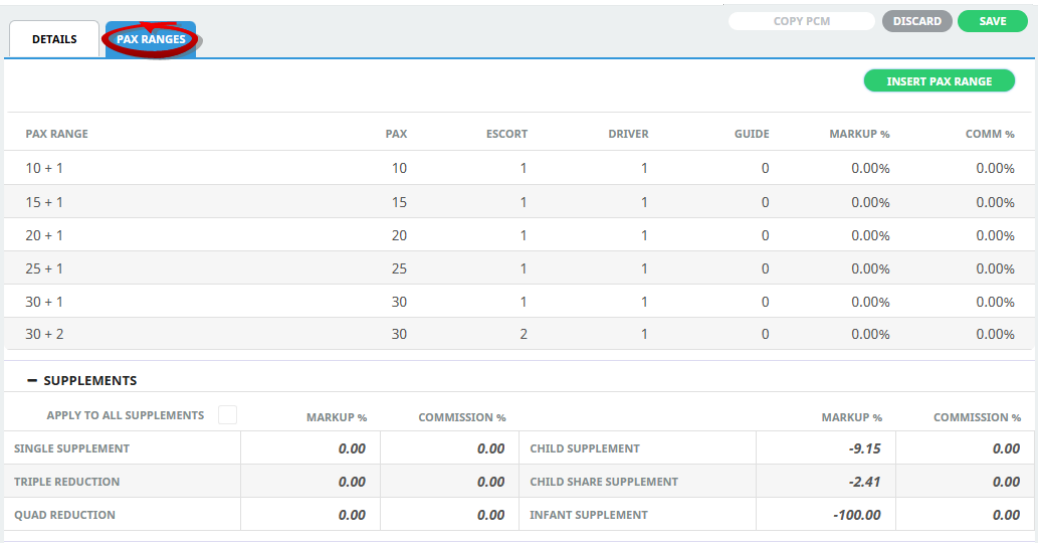
Pax Range Details

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.

7. 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.



PAX RANGE	PAX	ESCORT	DRIVER	GUIDE	MARKUP %	COMM %
10 + 1	10	1	1	0	0.00%	0.00%
15 + 1	15	1	1	0	0.00%	0.00%
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%
30 + 2	30	2	1	0	0.00%	0.00%

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

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

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SAVE

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

INSERT PAX RANGE

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.

What Next?

Review the fields and choices available on both the Insert PCM and Pax Range Details screens, described in the sections below. Once a PCM is created, you can change most details via *PCM Quotes > PCM Details* (see "Working with PCM Details" on page 57).

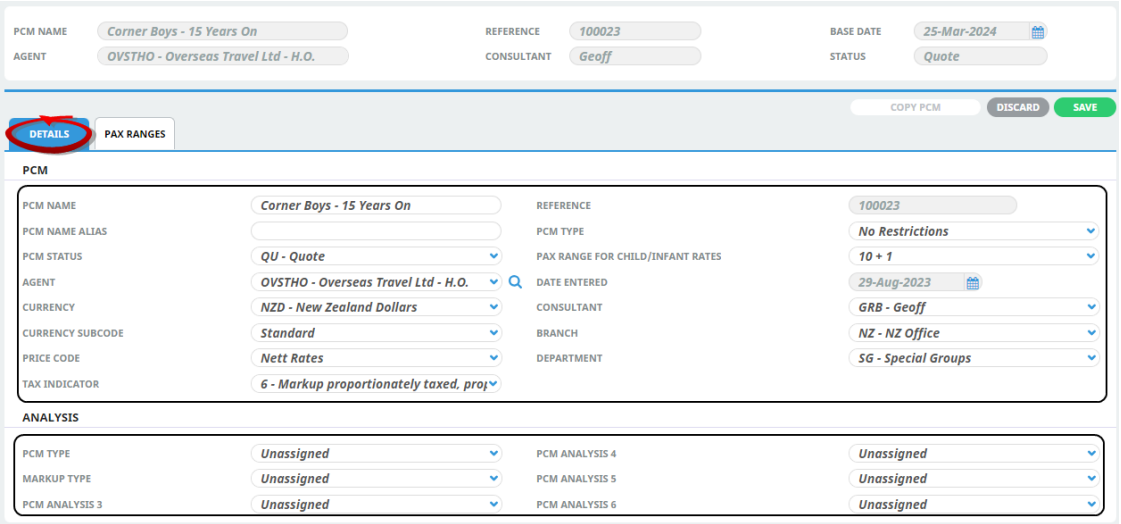
The next task is to add services to the PCM. Continue with "Add Services to a PCM" on page 31.

Add services from the Itinerary menu

PCM services are added from the Itinerary menu (*PCM Quotes > Itinerary*). Remember to retrieve a PCM first if one is not already displayed.

About the Insert PCM Fields

When a PCM is created, information is displayed across two tabs; the *Details* tab and the *Pax Ranges* tab. This screenshot (and following field descriptions) highlights the Details tab:



PCM Name

Enter a name by which to identify the PCM. The PCM Name is the prime search and retrieval field for the PCM and can be any combination of alphanumeric characters.

NOTE: The key point is to decide on a naming convention that makes it easy to find a quotation in the system. If the agent supplies a reference for this quotation then this can also be incorporated into the PCM name.

If the PCM name already exists, then, subject to system settings, a warning may appear, or the entry of the name may be denied. If this is the case the PCM name has to be changed in some way so that it does not clash with an existing PCM name.

Avoid using commas (,) and speech marks (") in PCM names where at all possible. There are a number of Excel-based reports that can output PCM analysis data, and commas/speech marks will distort the output of the data in the reports.

PCM Name Alias

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

PCM Status

Typical selections are Master, Package, Quote or Cancelled. The default PCM status is displayed from the Tourplan system settings and may be changed if required. This is determined by each user company's procedures.

NOTE: A PCM cannot be created without a status - a default status can be set using PCM INI setting STATUS.

Agent

The agent who has requested the quote can be selected from the agent drop-down list. Part of the agent code can be entered and the system can search from that point forward in the list. If the agent is not listed it will first have to be created in the Debtors application.

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

Price Code

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

Tax Indicator

Used to calculate Taxes on Markups and Commissions. The value displayed is defaulted from a setting in the Agent setup.

Currency

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

NOTE:

- Only currencies that have been attached to the agent in Debtors will display in the drop-down list.
- Currency rates between the Agent currency selected and the system currency (normally the currency of the country the system is domiciled in) must first be entered in the system currency exchange rate table.

Currency Subcode

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

Agent Currencies, Booking or PCM Currencies, Service Currencies and Invoice Currency

Tourplan is capable of handling foreign currencies at different levels within a booking or PCM. In general, there should be no need to change what are standard settings as applied to the system, but it is important that there be an understanding of how multiple currencies in a booking/PCM are calculated.

At the lowest level, each service in the Tourplan Product Database has a Buy Currency and a Sell Currency. It is quite common for these to be the same currency, but they do not have to be. Inbound Operators will generally have Buy and Sell currencies the same; Outbound Wholesalers generally not.

How a service has been set up in the Product Database, what the Agent currencies are, what the Booking/PCM currency is and, in bookings, what the Invoice Currency is, all go toward determining what currency calculations are made, and how they will impact on the pricing of the booking or PCM.

The following table provides some examples.

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Example 1 - Service Cost & Sell NZD: Agent/Booking NZD; Invoice NZD						
Agent Currency - NZD, Booking/PCM Currency - NZD						
Service Cost NZD	Service Sell NZD	Exchange Rate	Booking Cost NZD	Booking Sell NZD	Exchange Rate	Invoice NZD
100.00	130.00	1.00	100.00	130.00	1.00	130.00

Example 2 - Service Cost & Sell NZD: Agent/Booking NZD; Invoice USD						
Agent Currency - NZD, Booking/PCM Currency - NZD						
Service Cost NZD	Service Sell NZD	Exchange Rate	Booking Cost NZD	Booking Sell NZD	Exchange Rate	Invoice USD
100.00	130.00	1.00	100.00	130.00	.75	97.50

Example 3 - Service Cost & Sell NZD: Agent/Booking USD; Invoice USD						
Agent Currency - USD, Booking/PCM Currency - NZD						
Service Cost NZD	Service Sell NZD	Exchange Rate	Booking Cost USD	Booking Sell USD	Exchange Rate	Invoice USD
100.00	130.00	0.75	75.00	97.50	1.00	97.50

Example 4 - Service Cost & Sell NZD: Agent/Booking USD; Invoice NZD						
Agent Currency - USD, Booking/PCM Currency - USD						
Service Cost NZD	Service Sell NZD	Exchange Rate	Booking Cost USD	Booking Sell USD	Exchange Rate	Invoice NZD
100.00	130.00	0.75	75.00	97.50	0.75	130.00

Example 5 - Service Cost NZD, Service Sell USD; Agent/Booking NZD; Invoice NZD						
Agent Currency - USD, Booking/PCM Currency - USD						
Service Cost NZD	Service Sell USD	Exchange Rate	Booking Cost USD	Booking Sell USD	Exchange Rate	Invoice NZD
100.00	130.00	0.75	75.00	97.50	1.00	130.00

Example 6 - Service Cost NZD, Service Sell USD; Agent/Booking USD; Invoice USD						
Agent Currency - USD, Booking/PCM Currency - USD						
Service Cost NZD	Service Sell USD	Exchange Rate	Booking Cost USD	Booking Sell USD	Exchange Rate	Invoice USD
100.00	97.50	0.75	75.00	97.50	1.00	97.50

Reference

The system automatically creates a 6-digit reference number for this PCM. The default value in this field cannot be changed.

PCM Type

The PCM type determines:

- Whether the Group or FIT Costs from the Product Database will be used and
- Whether the PCM can be inserted into either a Group or FIT Booking

Groups Only

Costs from the Group Cost/Sell price columns in the Product Database will be used in the PCM. The PCM can only be inserted into Group bookings.

FITs Only

Costs from the FIT Cost/Sell price columns in the Product Database will be used in the PCM. The PCM can only be inserted into FIT bookings.

No Restrictions

Costs from the Group Cost/Sell price columns in the Product Database will be used in the PCM. The PCM can be inserted into both Group bookings and FIT bookings. When the PCM is inserted into one of the bookings modules, the correct pricing is selected; e.g. when inserted into a group booking, Groups pricing from the Product Database is used and when inserted into an FIT booking, FITs pricing from the Product Database is used.

Pax Range for Child/Infant Rates

When children/infants are costed in a PCM, the system needs to know on which of the Pax Ranges the Child/Infant rates need to be based. The Child and Infant rates are calculated as a reduction of the adult rate of the Pax Range selected in this drop-down field.

Date Entered

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

Consultant

The Tourplan consultant who is creating the PCM. The Consultant field is automatically filled in if the Consultant Code is linked to the user name in the PCM INI settings. If the code is not linked to the user, the consultant code can be selected using the drop-down list.

Branch/Department

The displayed values are from the initial set up.

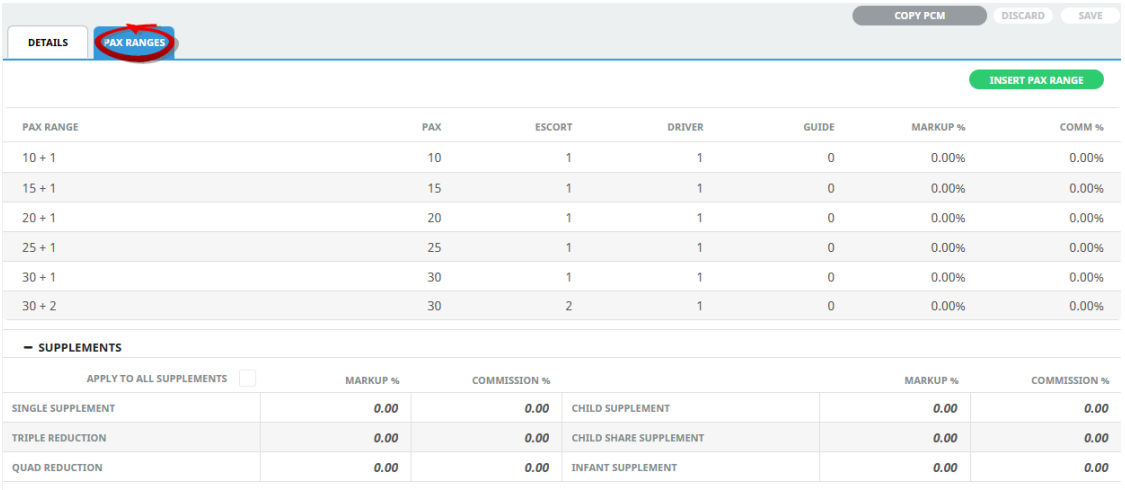
The Reference field can never be changed. The Branch/Department fields can be changed, however PCM costings may be altered depending on setup of your system.

Analysis section

These six fields are used for user-defined PCM analysis. The description labels of these fields are defined in the Code Setup application (*Home* > *Code Setup* > *INI Settings* > *System*). If these fields have not been defined, leave as Unassigned.

About the Pax Ranges Tab Fields

When a PCM is created, information is displayed across two tabs; the *Details* tab and the *Pax Ranges* tab. This screenshot (and following field descriptions) highlights the Pax Ranges tab:



PAX RANGE	PAX	ESCORT	DRIVER	GUIDE	MARKUP %	COMM %
10 + 1	10	1	1	0	0.00%	0.00%
15 + 1	15	1	1	0	0.00%	0.00%
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%
30 + 2	30	2	1	0	0.00%	0.00%

SINGLE SUPPLEMENT	0.00	0.00	CHILD SUPPLEMENT	0.00	0.00
TRIPLE REDUCTION	0.00	0.00	CHILD SHARE SUPPLEMENT	0.00	0.00
QUAD REDUCTION	0.00	0.00	INFANT SUPPLEMENT	0.00	0.00

Pax

Only enter the number of adult Pax for each Pax range. The system will automatically calculate costs and prices for Children, Children sharing and Infants.

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Escort

Enter the number of Escorts, if any, for each Pax range. An Escort typically accompanies the group throughout the tour.

NOTE: An Escort may also be referred to as a Group or Tour Leader.

Driver

Enter the number of Drivers, if any, for each Pax range.

NOTE: An entry 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.

Guide

Enter the number of Guides, if any, for each Pax range.

NOTE: A Guide may also be referred to as a Foreign Speaking Guide, Local Guide or FSG.

- If the majority of services in the PCM are going to include a guide and/or driver then enter the guide and driver quantities in this screen. Otherwise enter the guide/driver quantities on a service by service basis as required.
- In some places in this document, Escorts, Drivers and Guides may be collectively referred to as "Staff".

Markup (%)

This markup percentage is applied to the per person twin-share price calculated by Tourplan for every service that is added to this PCM. If the agent record has a default Markup percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required.

NOTE: These fields can be left blank and the markup set once the PCM has all the services added.

Commission (%)

This commission percentage is applied to the per person twin-share price calculated for every service that is added to this PCM. If the agent record has a default Commission percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required.

NOTE: If commissions are not being paid to agents, then these fields can be left blank.

Apply Markup and Commission To

This setting allows Markup and Commission percentages to be configured for one of the following:

- This Pax Range (this is the default setting)
- All Pax Ranges
- Pax Ranges with the Same Values - the same markup % and commission % values

Supplements Section

Apply to All Supplements

This checkbox when ticked applies Markup and Commission percentages to all Room and Child supplements.

Markup %

This markup percentage is applied to the per person Single Room Supplement, Triple Room Reduction, Quad Room Reduction, Child, Child Sharing and Infant Supplement costs calculated by Tourplan. If the agent record has a default Markup percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required. These fields can be left blank and the markup set once the PCM has all the services added.

Commission %

This commission percentage is applied to the same per person supplements, reduction, child and infant prices. If the agent record has a default Commission percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required. If commissions are not being paid to agents, then these fields can be left blank.

NOTE: The Supplements section can be expanded or contracted by clicking the **–** (contract) or **+** (expand) symbol next to the section heading.

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Add Services to a PCM

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

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

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

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

1. Transport
2. Accommodation
3. Sightseeing

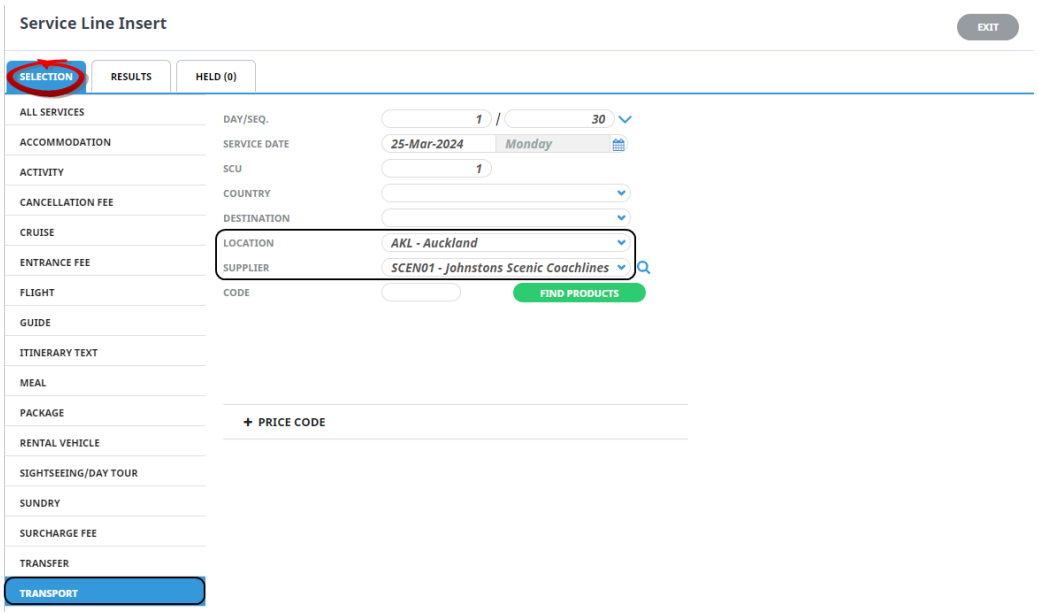
Insert a Transport Service

1. Services are added from the *PCM Quotes > Itinerary* menu.

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

   Select menu **PCMs > Itinerary** to show the itinerary for the PCM.

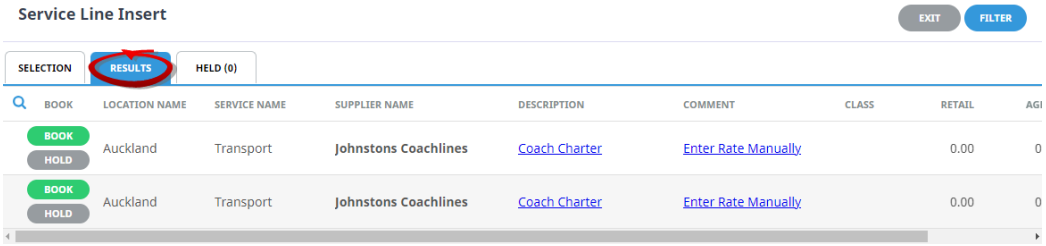
2. From the **Service Line Insert** screen (Selection tab), select the appropriate transfer type from the Service Category list (e.g. *Transport*) and in the Location drop-down field, select the location where the service is provided (e.g. *AKL - Auckland*). You can also enter other search criteria to reduce the number of results returned (e.g. *SCEN01 - Johnstons Scenic Coachlines*).



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

3. Click **Find Products**.

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

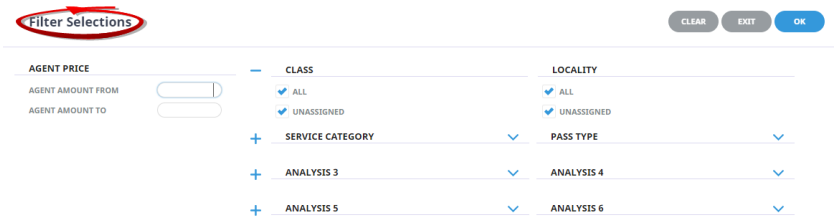


Services cannot be "Booked" as such in PCMs, so use of the term BKG, Booking or Book in some of the PCM screens is irrelevant (some screens are common to both PCMs and Bookings). What is effectively happening is the service has been ***selected*** for the PCM.

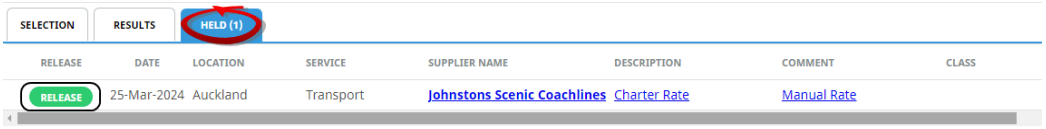
NOTE:

- Filter Selections can be used to refine a search. All of the Filter Selections fields can be attached to services in the Product Database so, if being used, they automatically display in this screen.
- Clicking Hold will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.
- Additional fields and selections available on this screen are described in "About the Service Line Insert Fields (Results Tab)" on page 35.

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



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



NOTE: Additional fields and selections available on this screen are described in "About the Service Line Insert Fields (Held Tab)" on page 37.

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

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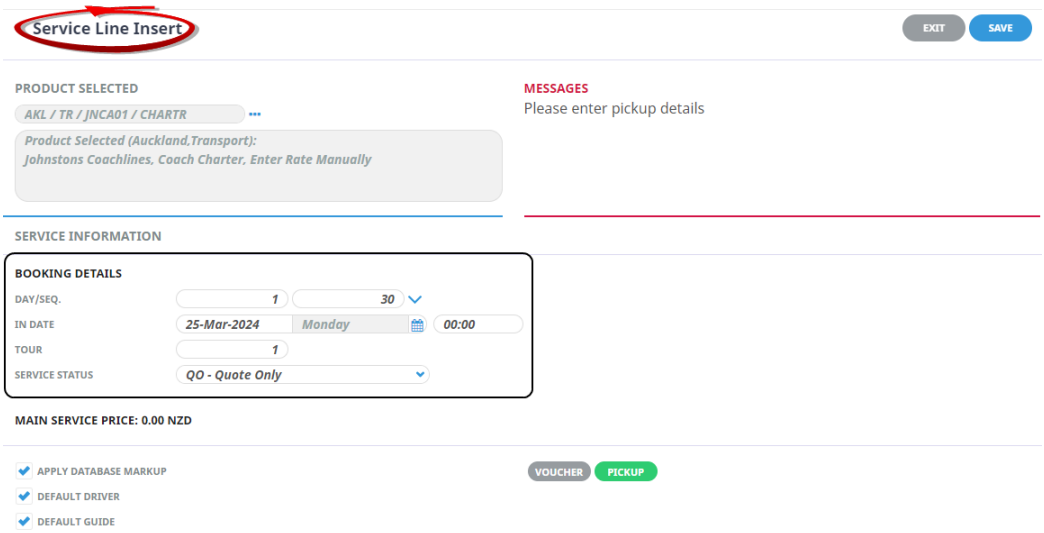


NOTE:

- If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.
- Additional fields and selections available on this screen are described in "Service Line Insert Fields (Booked)" on page 38.

A product is not actually selected for the PCM until you click **Save**.

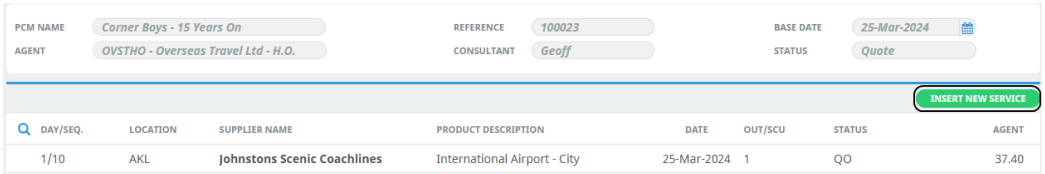
a. If known, Pick Up and Drop Off details can be inserted for this service, click the **Pick Up** button to add times and remarks. Information can be inserted at a later date from the Itinerary Menu Pickup / Dropoff.

b. If used, Voucher Text can be inserted for this service. click the **Voucher** button to add Service or Rate Voucher Text.

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

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

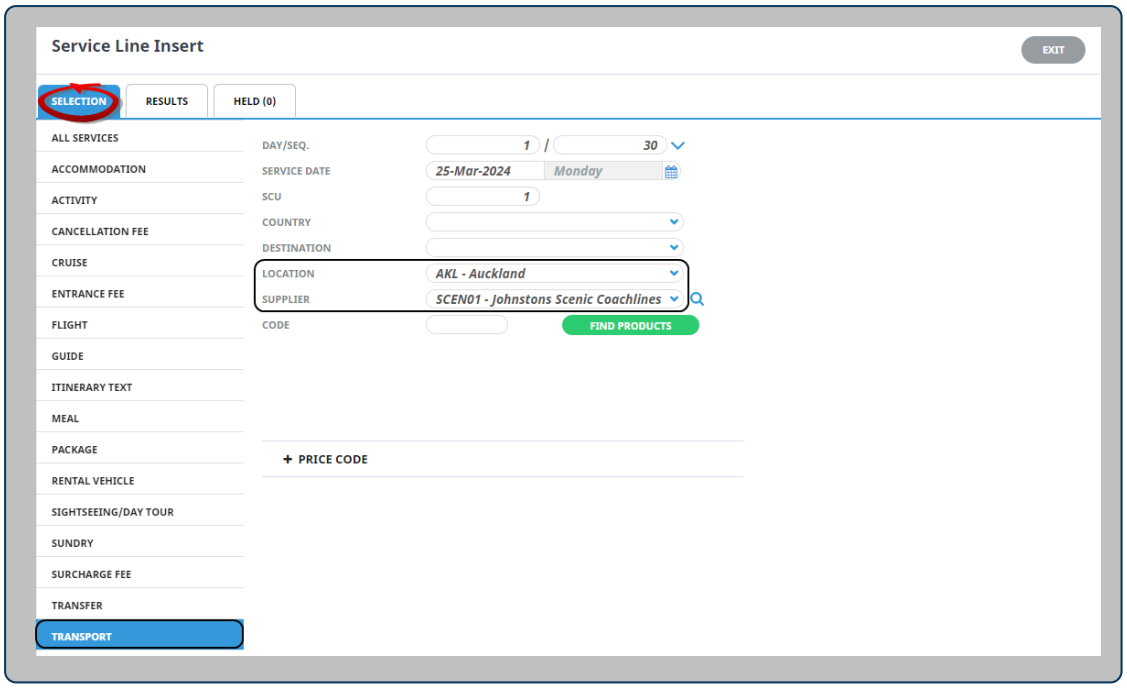
8. Once you click *Save*, the service is saved and the **Itinerary view** of the PCM is displayed.



NOTE: You can now add another service (see "Add Services to a PCM" on page 31) or manage other parts of the PCM (see "Managing Existing PCMs" on page 47) .

NOTE: Some services may require manual pricing - if this is the case, the *Service rate requires manual pricing entry* screen appears and you will need to manually add pricing information (see "Manual/Edited Pricing" on page 44).

About the Service Line Insert Fields (Selection Tab)



All Service Types

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

Day/Seq.

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

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

Service Date

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

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

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

SCU

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

> Once a product is selected, the SCU gets a label, which comes from the Second Charge Unit description in the Product Database.
>
> For example, the supplier ***SCEN01 - Johnstons Scenic Coachlines***, out of ***AKL - Auckland*** has two product offerings; a charter service and an intercity service. These are found in the Product Database via *Home > Products > Product Setup* (*Price Rules tab)*.

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For the charter service, the First Charge Unit is ***Coach*** and the Second Charge Unit is ***Tour***, so this service will have an SCU label of ***Tour*** on the Service Line Insert screen when it is selected.

Conversely, the intercity service will have an SCU label of ***Trip***, which is how the service is charged.

NOTE:

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

Country

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

Destination

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

Location

The location where the service takes place or originates.

Supplier

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

Code

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

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

Price Code (+ to expand)

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

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

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

The remaining selections are:

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

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

About the Service Line Insert Fields (Results Tab)

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

NOTE: All scrollable lists can have columns added or removed per user (i.e. you can change the default columns that appear in your view of the list). Click on a space in between two column labels (if you click on

the label itself, the scroll will re-sort based on the column clicked on). The list of available column names will display and they can be check-box selected/deselected. The width can also be set, as can normal or bold font.

Filter Button

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

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

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

Search Icon

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

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

Book

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

Location Name

Full name of the location where the service is provided.

Service Name

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

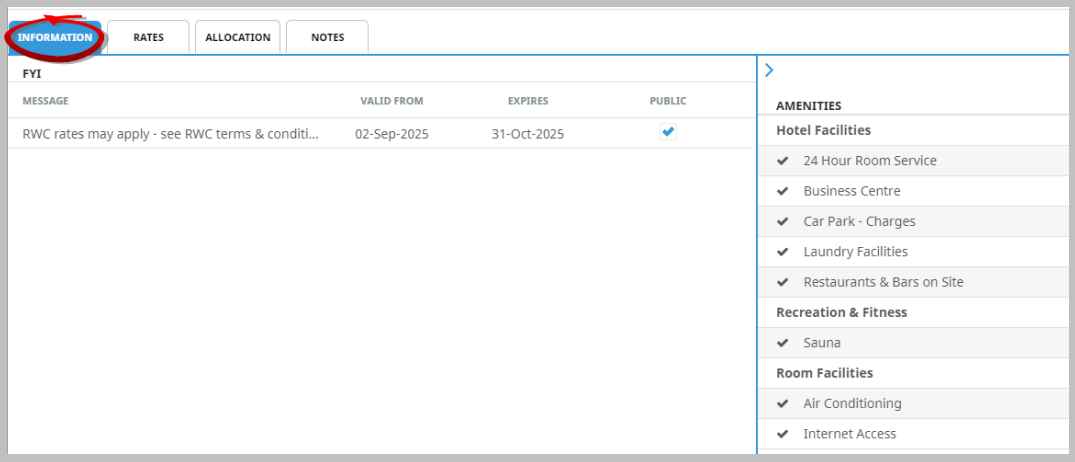
Name

Full name of the service supplier.

Description

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

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



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Comment

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

Class

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

Sell

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

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

"Booked" is not Saved

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

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

About the Service Line Insert Fields (Held Tab)

This tab shows any services that have been "held" and not yet selected for the service list. If multiple services for a particular location are going to be inserted into the PCM, they can be tagged and held as they are selected, and then a list of all currently held services can be viewed in this tab. This is a convenient method of inserting a number of services for the same location.

Products are presented in list form under the following columns:

Release

A green button labelled *Release*, which allows unwanted services to be "released" back into the pool of available products (i.e. no longer held).

Date

The date for which the service will be booked once *Book Held Services* is clicked.

Location

Full name of the location where the service is provided.

Service

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

Name

Full name of the service supplier. A drill-down link provides information on Rates and Notes, as described below under Description.

Description

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

Comment

A further drill-down link that shows the same information as Description.

NOTE: The link goes to the "More Info" pages of the product. The columns in the select service scroll are customisable per site/per user, and not all users will have the default column headings. The link is common to the (product) Code, Description and Comment fields.

Class

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

Sell

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

Service Line Insert Fields (Booked)

Product Selected

Read-only fields, showing full product code and description.

The three dots that follow the product code ... allow users to view the product more information pages, rates including age policies and room capacities, as well as allocation availability and notes for the selected product.

Messages

Displays any messages associated with the product.

Service Information

Day/Seq

The day number / sequence number (within the day) of the service line.

In Date

The date of the service. For services on one date only; e.g. Transfers, Meals, Sightseeing etc., this is the actual date of the service. For services spanning dates; e.g. Accommodation, Rental Vehicles etc., this is the In / Start date.

SCU - Second Charge Unit

The label of this field shows the SCU in use for the service shown. The value indicates the quantity of SCUs (e.g. 1 Trip, 2 Rental Cars, 5 Nights etc.).

Service Status

Service status can dictate such things as whether vouchers can be issued or allocation held etc, the system is set to default and will insert the initial service status set in System Settings - the service status can be manually amended if required.

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 etc., in PCMs these functions are not available – after all, a PCM is either a Quote, 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" (or Alternate) service.

Extras

A list of bookable extras attached to the product will display in the column on the left under service information. The value required depends on the Extra listed.

Costing Options

Apply (Product) Database Markup (Check-box)

This controls whether the price being brought into the PCM is the product Cost Price, or whether the Product Database Markup (if any) should be applied for this service.

Default Driver / Guide (Checkbox)

These check-boxes control whether the Service Database defaults that have been set for Drivers and/or Guides should be adhered to when the service is being brought into the PCM. If the box(es) are unchecked, the numbers of Drivers and/or Guides are set to 0. These check-boxes are only obeyed when there are driver(s) and/or Guide(s) set in the PCM Header.

Voucher button (grey)

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Displays service-based voucher text that may be associated with the product.

Pickup button (green)

Enables Pickup/Dropoff (i.e. Arrive/Depart) details to be entered for the service.

Accommodation and Sightseeing Services

Insert an Accommodation Service

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

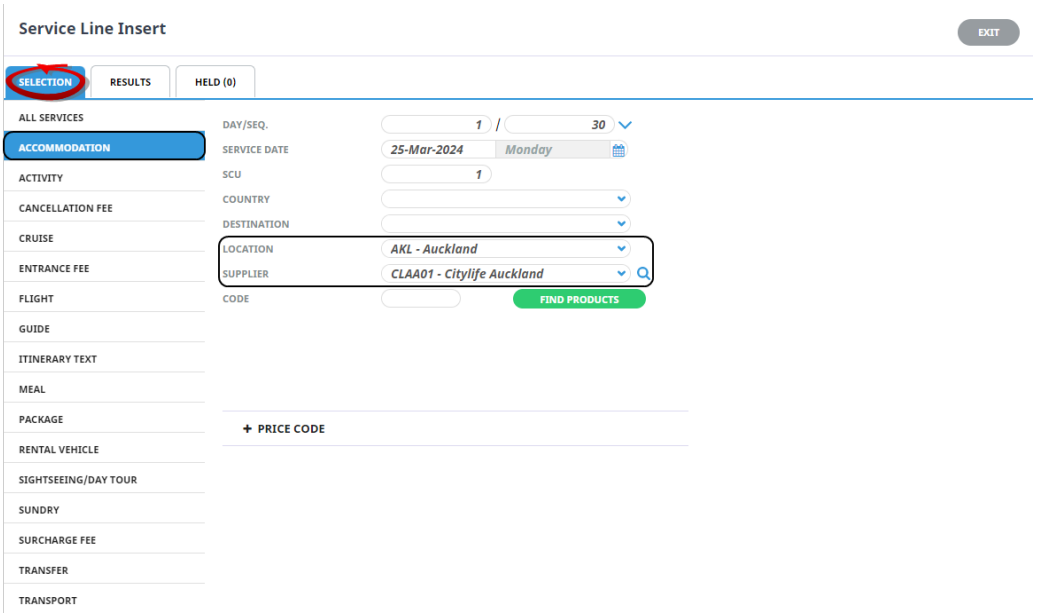
   a. Select menu **PCM Quotes > Itinerary** to show the itinerary for the PCM.

   b. Click **Insert New Service**.

   INSERT NEW SERVICE

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

2. From the **Service Line Insert** screen (Selection tab), select *Accommodation* from the All Services list and in the Location drop-down field, select the location where the service is provided (e.g. *AKL - Auckland*). You can also enter other search criteria to reduce the number of results returned (e.g. *CLAA01 - Citylife Auckland*).

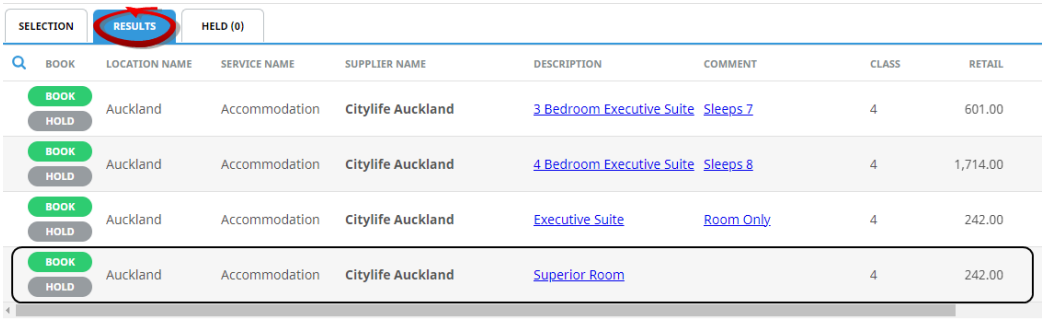


   NOTE: Fields and selections available on this screen are described fully in "About the Service Line Insert Fields (Selection Tab)" on page 34.

3. Click **Find Products**.

   FIND PRODUCTS

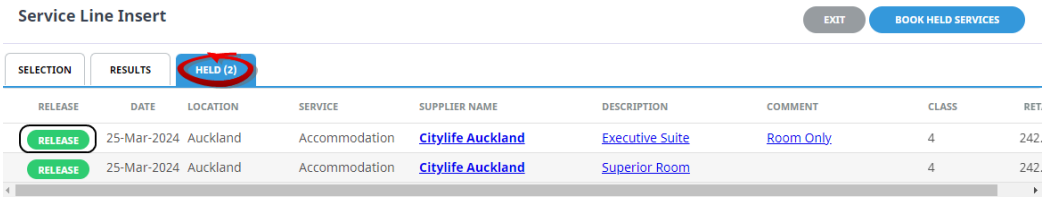
4. Products matching the Service Type and location are returned in the **Results** tab. Find the product to add and click *Book* or *Hold* as required.



NOTE:

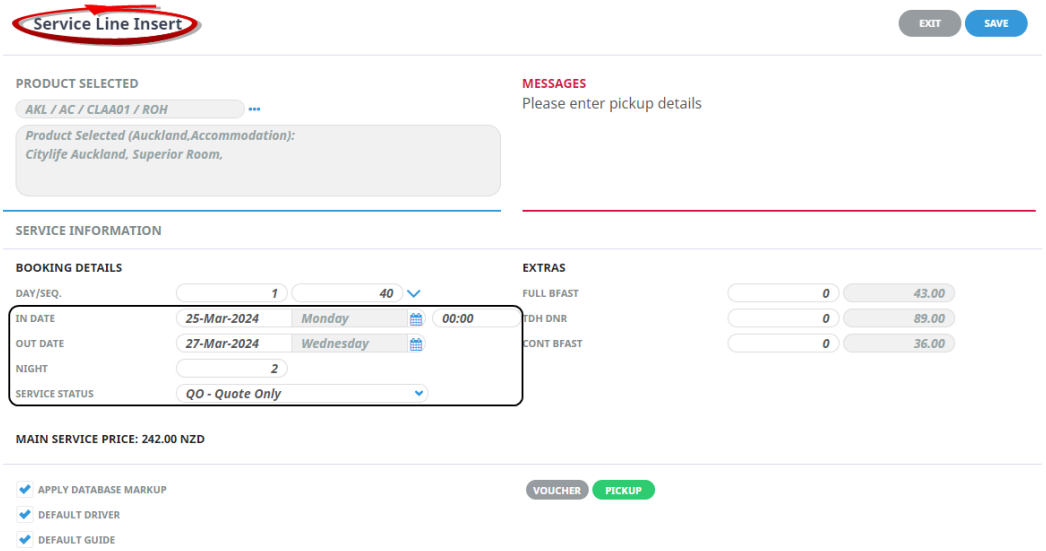
- Clicking Hold will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.
- Additional fields and selections available on this screen are described in About the Service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

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



NOTE: Additional fields and selections available on this screen are described in "About the Service Line Insert Fields (Held Tab)" on page 37.

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



NOTE:

- If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.
- Additional fields and selections available on this screen are described in "Service Line Insert Fields (Booked)" on page 38.

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

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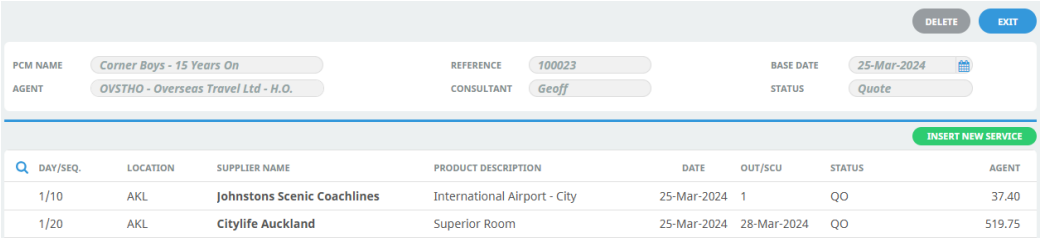
7. Click **Exit** to discard any changes.

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



NOTE: You can now add another service (see "Add Services to a PCM" on page 31) or manage other parts of the PCM (see "Managing Existing PCMs" on page 47) .

NOTE: Some services may require manual pricing - if this is the case, the *Service rate requires manual pricing entry* screen appears and you will need to manually add pricing information (see "Manual/Edited Pricing" on page 44).

Insert a Sightseeing Service

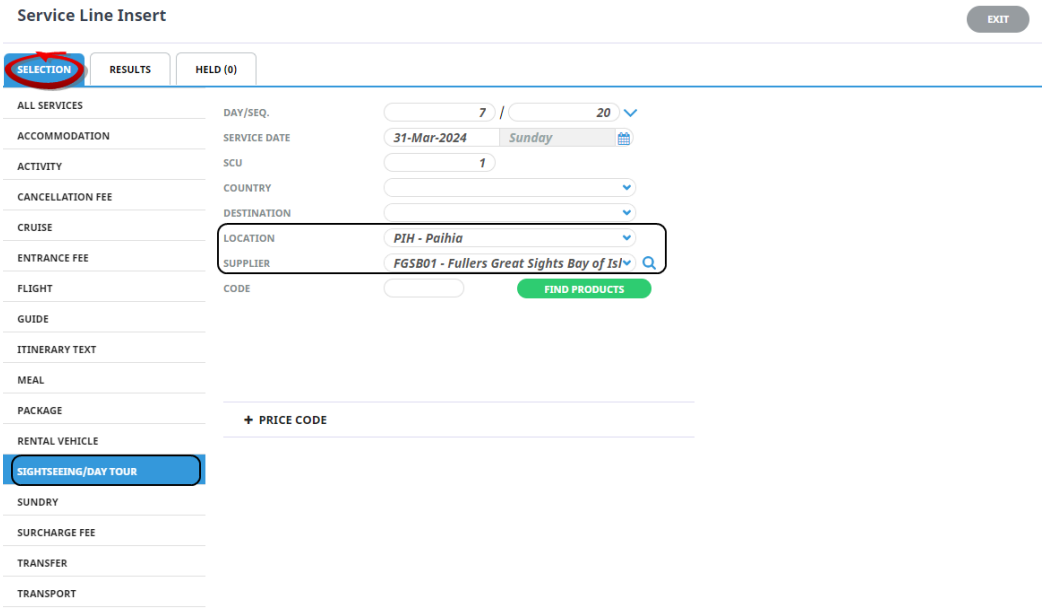
1. Services are added from the *PCM Quotes > Itinerary* menu:

   a. Select menu **PCM Quotes > Itinerary** to show the itinerary for the PCM.

   b. Click **Insert New Service**.

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

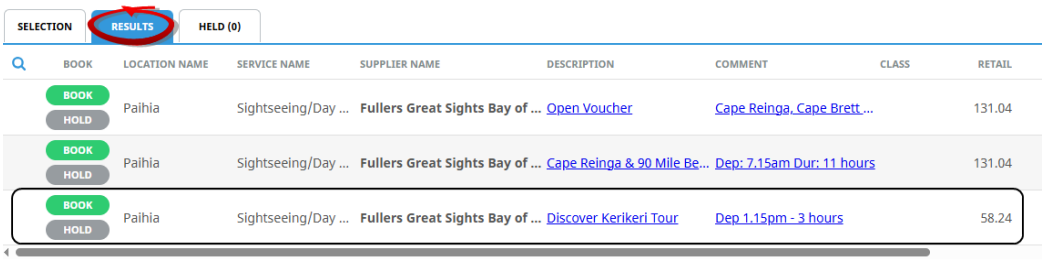
2. From the **Service Line Insert** screen (Selection tab), select *Sightseeing/Day Tour* from the All Services list and in the Location drop-down field, select the location where the service is provided (e.g. *PIH - Paihia*). You can also enter other search criteria to reduce the number of results returned (e.g. *FGSB01 - Fullers Great Sights Bay of Islands...*).



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

3. Click **Find Products**.

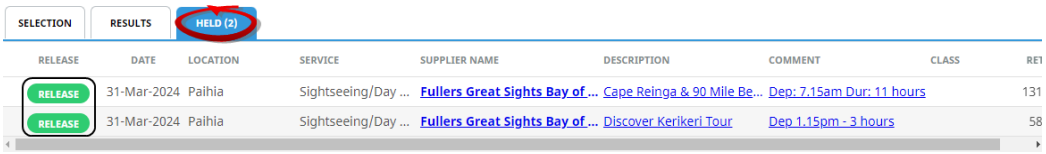
4. Products matching the service and location are returned in the **Results** tab. Find the product to add and click *Book* or *Hold* as required.



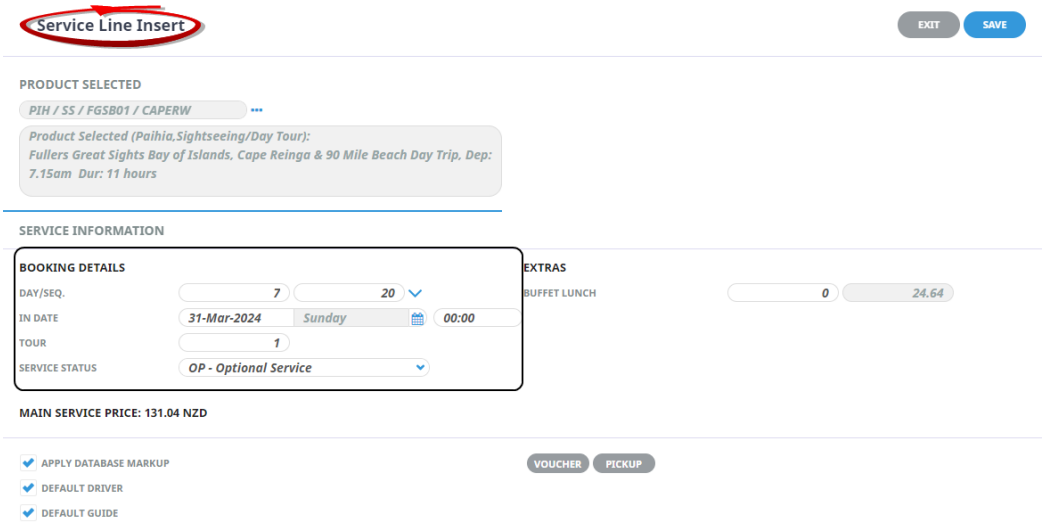
NOTE:

- Use the *Filter* button to open the Filter Selections screen to further reduce the list of results returned.
- Clicking Hold will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.
- Additional fields and selections available on this screen are described in "About the Service Line Insert Fields (Results Tab)" on page 35.

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



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



A product is not actually selected for the PCM until you click **Save**.

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NOTE:

- If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.
- Additional fields and selections available on this screen are described in "Service Line Insert Fields (Booked)" on page 38.

6. Adjust the Day/Seq fields to show the correct values. In this example, they show ***7*** and ***20***. Also, if this is an optional service, select that option from the *Service Status* drop-down list.

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

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

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

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	**Johnstons Scenic Coachlines**	International Airport - City	25-Mar-2024	1	QO	37.40
1/20	AKL	**Citylife Auckland**	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75
4/10	AKL	**Johnstons Coachlines**	Coach Charter	28-Mar-2024	1	QO	180.00
4/20	PIH	**Copthorne Bay Of Islands Hotel**	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00
6/10	PIH	**Fullers Great Sights Bay of Islands**	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42
6/20	PIH	**Waitangi National Trust**	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57
7/10	PIH	**Fullers Great Sights Bay of Islands**	Cape Reinga & 90 Mile Beach Day Trip	31-Mar-2024	1	OP	171.25

NOTE:

- The sightseeing service (Fullers Great Sights Bay of Islands) has been added as an optional service (i.e. it has a Service Status of *OP - Optional Service*) and appears highlighted in the list. Other services were added to this PCM prior to the sightseeing service and one of these extras is also optional and so appears highlighted in the list (Waitangi National Trust).
- The Optional Service status is defined in Code Setup and has had a colour attached to it. When services are given that status, they display in that colour in both the Itinerary view and the Dashboard view.

NOTE: You can now add another service (see "Add Services to a PCM" on page 31) or manage other parts of the PCM (see "Managing Existing PCMs" on page 47) .

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

Manual/Edited Pricing

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

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

The rate for the service has expired

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

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

The rate for the service crosses a season boundary

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

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

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

The rate requires manual pricing

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

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

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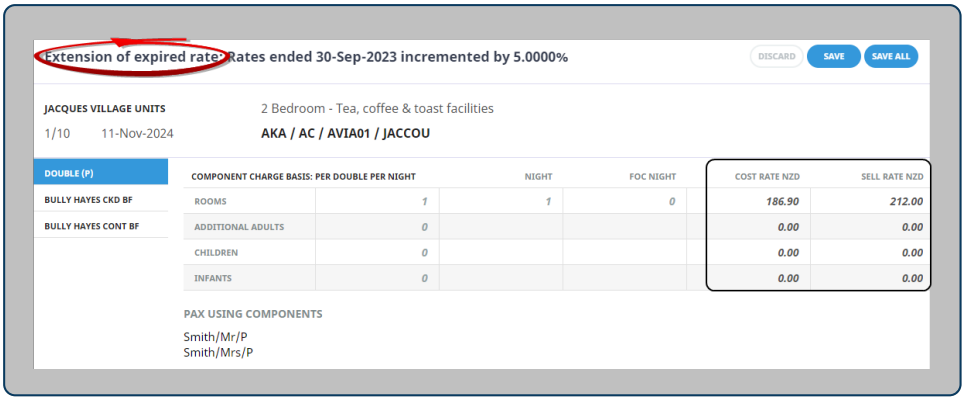
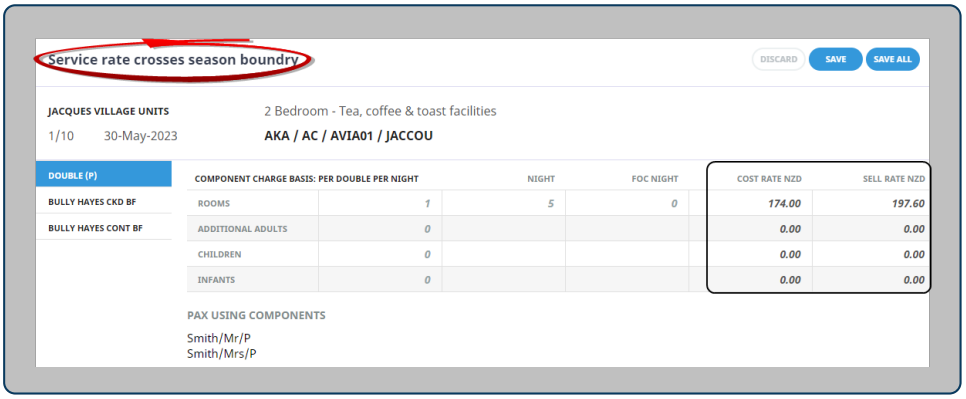
Add/Edit Manual Pricing for a Service Rate

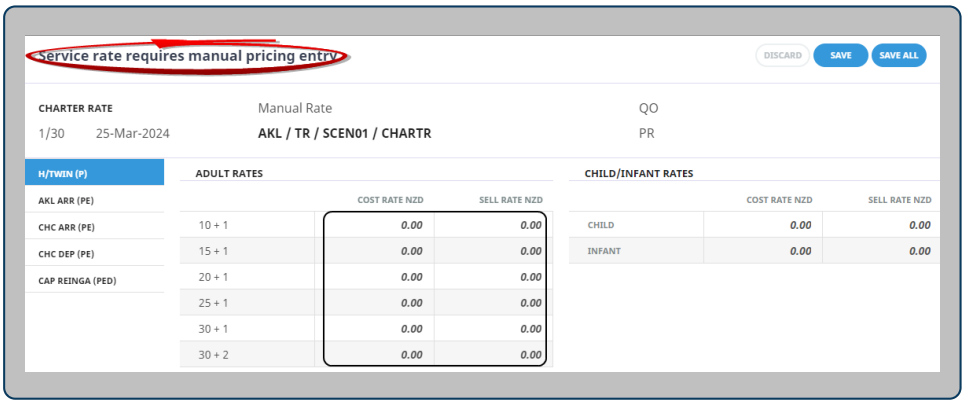
1. On the overlay screen that pops-up, enter (or edit) any manual rates needed into the relevant fields.
   - Extension of expired rate



   - Service rate crosses season boundary



   - Service rate requires manual pricing entry



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

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

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CHAPTER 3

Managing Existing PCMs

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

This chapter covers working with existing PCMs and describes common tasks such as how to search for and retrieve a PCM, how to change basic PCM details, how to update the itinerary and how to add notes and documentation to a PCM.

In this chapter ...

An Example PCM 48
What next? 49
Retrieve an Existing PCM 50
View Existing PCMs 53

An Example PCM

As explained in "Creating New PCMs" on page 21 of this user manual, the default view of an existing PCM is the Dashboard view, as shown in the example:

Completed PCM - Dashboard View

DELETE EXIT

PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

Child/Infant Rates from Pax Range: 10 + 1

As well as the Pax Ranges tab, the Dashboard View of a PCM also includes a Supplements tab:

Completed PCM - Dashboard View (Supplements tab)

PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

PAX RANGES | SUPPLEMENTS

	SINGLE SUPPLEMENT	TRIPLE REDUCTION	QUAD REDUCTION	CHILD SUPPLEMENT	CHILD SHARE SUPPLEMENT	INFANT SUPPLEMENT
VOUCHER COST	969.06	69.79	-2.54	236.04	1,205.10	0.00
MARKUP %	16.52	15.82	16.06	13.26	15.88	0.00
MARKUP	160.07	11.04	-0.41	31.30	191.37	0.00
RETAIL	1,129.13	80.83	-2.95	267.34	1,396.47	0.00
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	1,129.13	80.83	-2.95	267.34	1,396.47	0.00
INCLUDES TAX	147.28	10.54	-0.38	34.87	182.15	0.00
TOTAL	1,129.13	80.83	-2.95	267.34	1,396.47	0.00
MARGIN %	14.18	13.66	13.84	11.71	13.70	0.00
MARGIN	160.07	11.04	-0.41	31.30	191.37	0.00

Child/Infant Rates from Pax Range: 10 + 1

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

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What next?

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

1. "Retrieve an Existing PCM" on the next page - there are several ways to search for an existing PCM, depending on the information you have about it.
2. "Working with PCM Details" on page 57 - changing basic PCM details includes general setup info, markup and/or commission info and PCM or agent notes. You can also copy and recalculate a PCM.
3. "Working with PCM Itineraries" on page 77 - changing the itinerary covers such things as pickup/dropoff details, voucher information, changing travel dates or times, adding service/product notes and inserting additional PCMs.
4. "Working with PCM Operations" on page 107 - the operations section covers PCM tasks such as package setup, generating messages, checking the message queue and adding/updating contact details.

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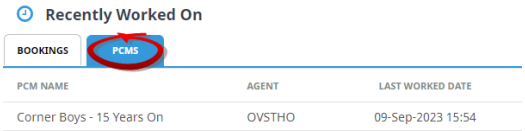
Retrieve an Existing PCM

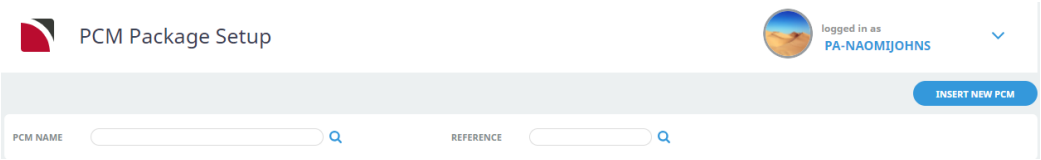
There are a number of ways to retrieve an existing PCM from the database:

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



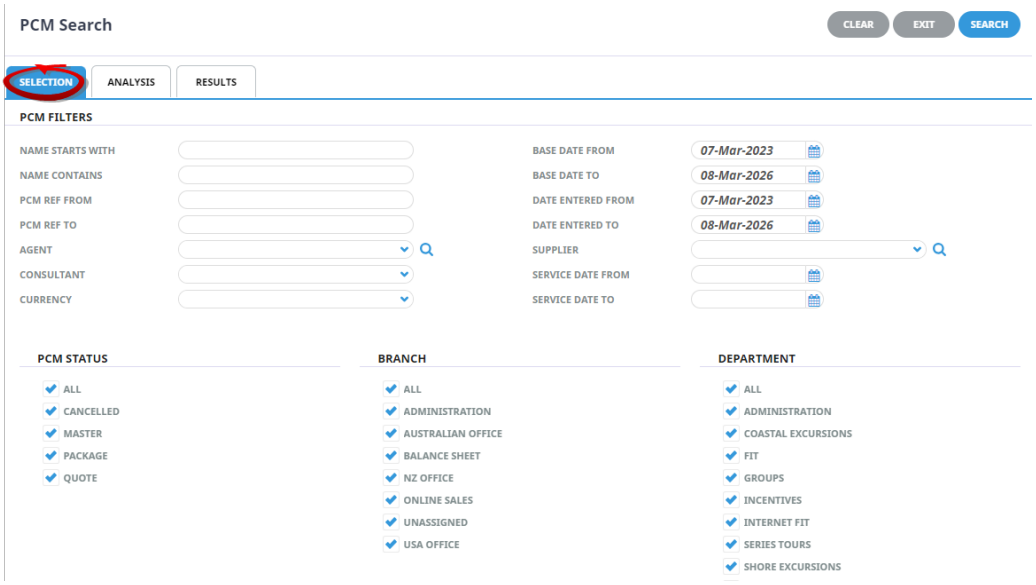
   a. Simply locate the item in the list and
   b. Click to open

2. From the **PCM Quotes home page**, using the *PCM Name* field.



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

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



All three options are straightforward and intuitive.

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

Retrieve an Existing PCM

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

2. Leaving the Name field blank, click either of the **Search icons** to open the full PCM Search screen.

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

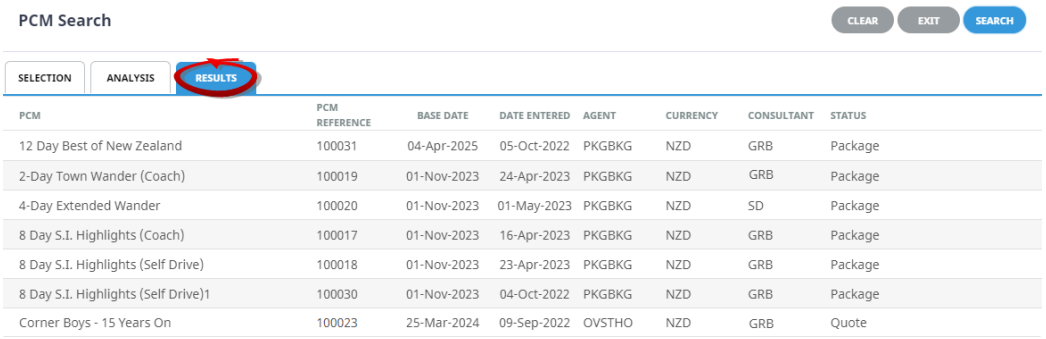
   NOTE: Don't forget about dates - results are returned within the date ranges set. For more information, see "About the PCM Search Fields" below.

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

   SEARCH

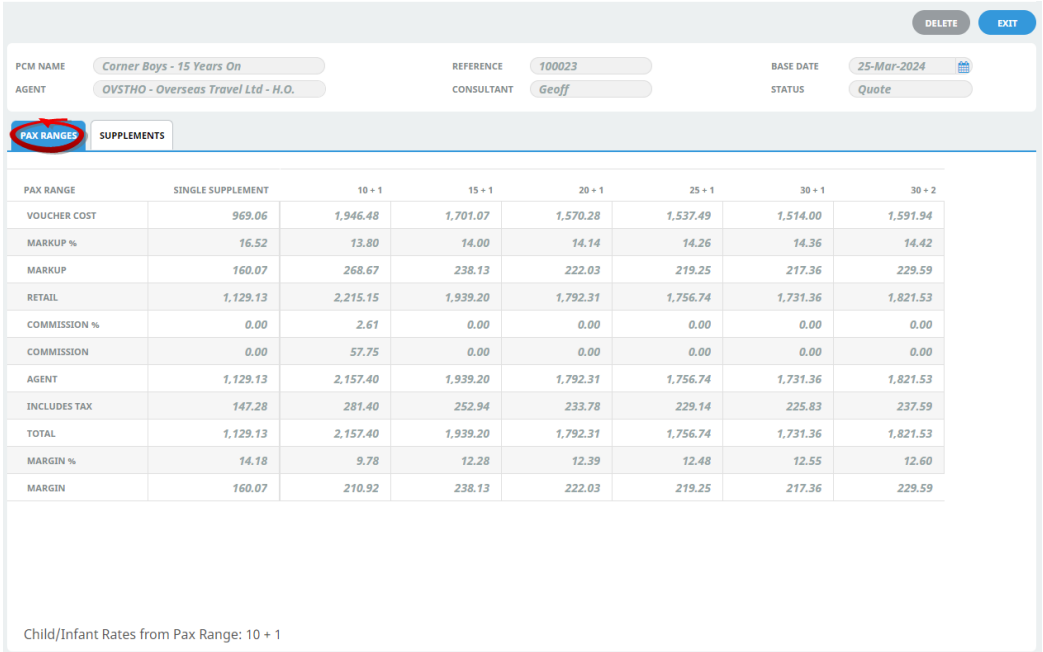
4. Examine the list of **Results** and click a PCM to retrieve it.

   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	PCM REFERENCE	BASE DATE	DATE ENTERED	AGENT	CURRENCY	CONSULTANT	STATUS
12 Day Best of New Zealand	100031	04-Apr-2025	05-Oct-2022	PKGBKG	NZD	GRB	Package
2-Day Town Wander (Coach)	100019	01-Nov-2023	24-Apr-2023	PKGBKG	NZD	GRB	Package
4-Day Extended Wander	100020	01-Nov-2023	01-May-2023	PKGBKG	NZD	SD	Package
8 Day S.I. Highlights (Coach)	100017	01-Nov-2023	16-Apr-2023	PKGBKG	NZD	GRB	Package
8 Day S.I. Highlights (Self Drive)	100018	01-Nov-2023	23-Apr-2023	PKGBKG	NZD	GRB	Package
8 Day S.I. Highlights (Self Drive)1	100030	01-Nov-2023	04-Oct-2022	PKGBKG	NZD	GRB	Package
Corner Boys - 15 Years On	100023	25-Mar-2024	09-Sep-2022	OVSTHO	NZD	GRB	Quote

5. The PCM is retrieved and displayed in the PCM Quotes **Dashboard View**.



PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

About the PCM Search Fields

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

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

Name Starts With

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

Name Contains

As with Name From, this field will be empty. This is a string search facility; i.e. it will find PCMs matching any combination of consecutive characters entered in the field, regardless of where in the PCM name the string occurs.

Agent

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

Consultant

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

Currency

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

Base Date From/To

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

Date Entered From/To

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

Supplier

This filter will list PCMs with services using the selected supplier. This is a dropdown field which allows on supplier to be selected.

Service Date From/To

This filter will list PCMs with services selected between the specified dates. These fields will be blank by default.

PCM Status

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

NOTE:

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

Branch / Department

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

Analysis Tab

PCM analysis fields can be used to filter PCMs by specific PCM analysis fields.

Results Tab

The results tab can be used to view a list of results, or the search button can be selected. Users can select column titles and column widths unique to their requirements. Please see "Appendix 1 - Scroll Column Headings" on page 128 to learn how to amend the column list.

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View Existing PCMs

Dashboard View

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

Completed PCM - Dashboard View (Pax Ranges tab):

DELETE EXIT

PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

Child/Infant Rates from Pax Range: 10 + 1

Completed PCM - Dashboard View (Supplements tab):

PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

PAX RANGES | SUPPLEMENTS

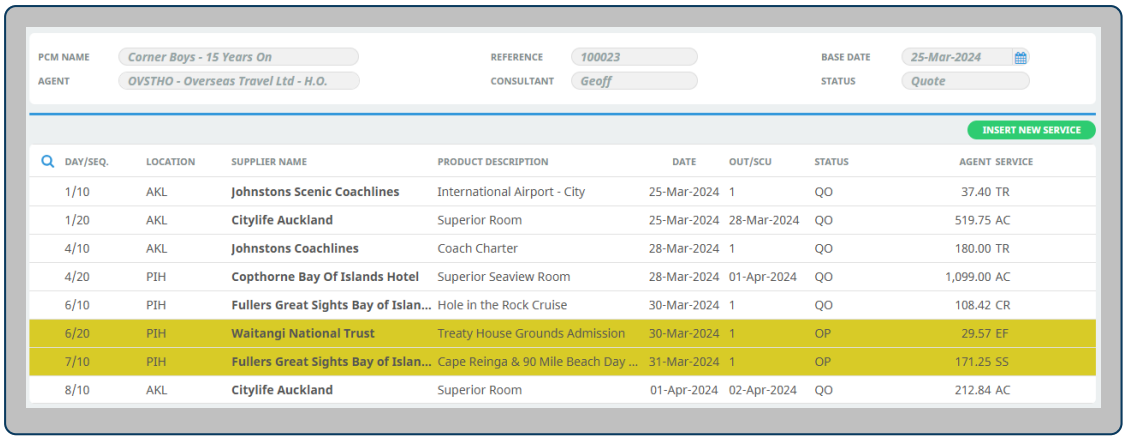
	SINGLE SUPPLEMENT	TRIPLE REDUCTION	QUAD REDUCTION	CHILD SUPPLEMENT	CHILD SHARE SUPPLEMENT	INFANT SUPPLEMENT
VOUCHER COST	969.06	69.79	-2.54	236.04	1,205.10	0.00
MARKUP %	16.52	15.82	16.06	13.26	15.88	0.00
MARKUP	160.07	11.04	-0.41	31.30	191.37	0.00
RETAIL	1,129.13	80.83	-2.95	267.34	1,396.47	0.00
COMMISSION %	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	1,129.13	80.83	-2.95	267.34	1,396.47	0.00
INCLUDES TAX	147.28	10.54	-0.38	34.87	182.15	0.00
TOTAL	1,129.13	80.83	-2.95	267.34	1,396.47	0.00
MARGIN %	14.18	13.66	13.84	11.71	13.70	0.00
MARGIN	160.07	11.04	-0.41	31.30	191.37	0.00

Child/Infant Rates from Pax Range: 10 + 1

Itinerary View

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

Example: Completed PCM - Itinerary View



DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	SERVICE
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40	TR
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75	AC
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00	TR
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00	AC
6/10	PIH	Fullers Great Sights Bay of Islan...	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42	CR
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57	EF
7/10	PIH	Fullers Great Sights Bay of Islan...	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25	SS
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84	AC

About the Itinerary View Columns

NOTE: You can change the columns displayed - see "About the Service Line Insert Fields (Results Tab)" on page 35.

Day/Seq

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

Location

The location code for each service.

Supplier Name

The Supplier of each service.

Service Description

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

Date

The start date of each service.

Out/SCU

This column will display the end date of the service.

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

Status

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

Agent

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

Search Icon

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

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

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Alternative column selections can occur by selecting (right clicking) the white space in the column headings. A full list of available column options is made available to customise your itinerary screen.

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

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CHAPTER 4

Working with PCM Details

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

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

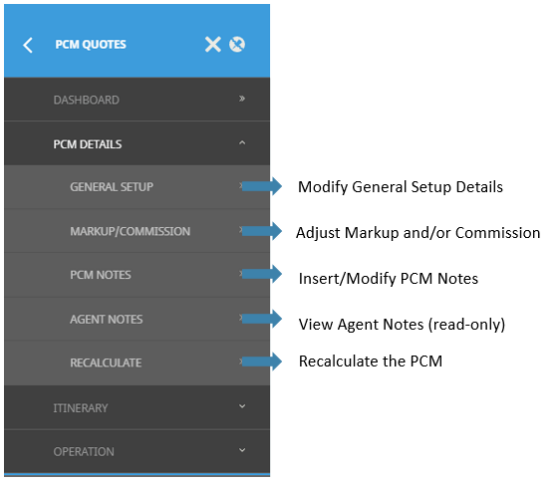
In this chapter ...

PCM Details View 58
General Setup 59
Markup / Commission 66
PCM Notes 70
Agent Notes 73
Recalculate PCM 74
Copy PCM 75

TOURPLAN

PCM Details View

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



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General Setup

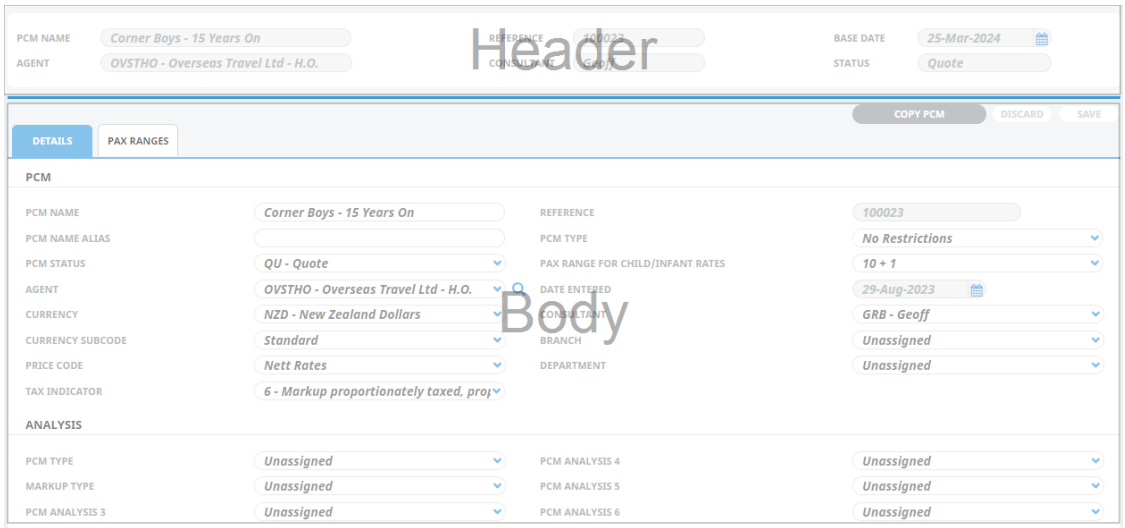
This is the first of six tasks described in this user manual for changing PCM details.

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. "General Setup" above (this task)
2. "Markup / Commission" on page 66
3. "PCM Notes" on page 70
4. "Agent Notes" on page 73
5. "Recalculate PCM" on page 74

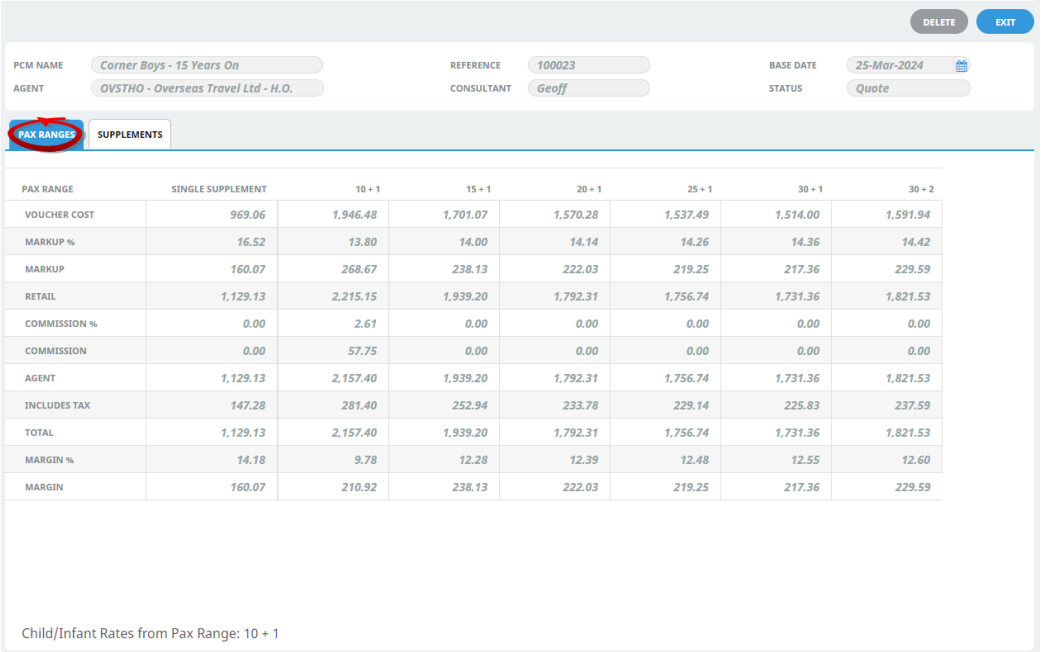
The PCM Details screen contains information that is set up during "Create a PCM " on page 23. The screen comprises fields in two sections; a Header (read-only) and a Body with two tabs; a Details tab and a Pax Ranges tab. These sections are highlighted below for a typical PCM, with the *Details* tab selected.



Edit General Setup Details

1. If you haven't already done so, search for and retrieve a PCM to work with (see "Retrieve an Existing PCM" on page 50).

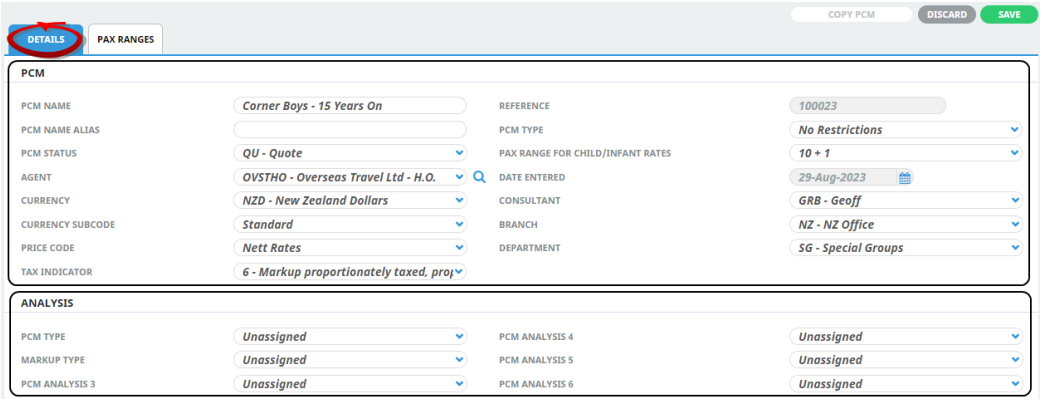
2. The default view for a is the **Dashboard View**.



PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

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

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



PCM information is displayed across two tabs; Details (above) and Pax Ranges (below). On the Pax Ranges tab, you can edit existing pax ranges or insert new ones via the green *Insert Pax Range* button.

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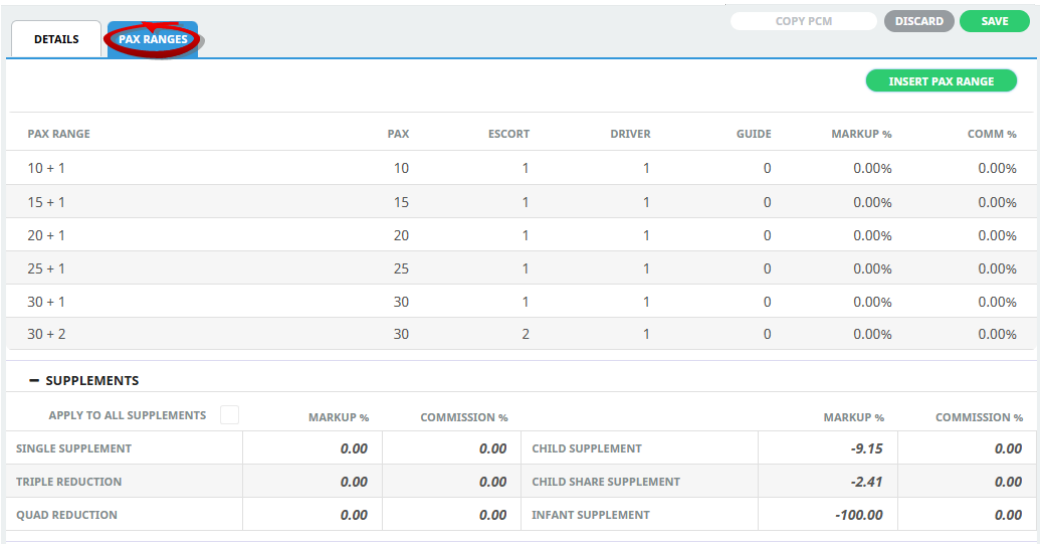

PAX RANGE	PAX	ESCORT	DRIVER	GUIDE	MARKUP %	COMM %
10 + 1	10	1	1	0	0.00%	0.00%
15 + 1	15	1	1	0	0.00%	0.00%
20 + 1	20	1	1	0	0.00%	0.00%
25 + 1	25	1	1	0	0.00%	0.00%
30 + 1	30	1	1	0	0.00%	0.00%
30 + 2	30	2	1	0	0.00%	0.00%

	MARKUP %	COMMISSION %		MARKUP %	COMMISSION %
SINGLE SUPPLEMENT	0.00	0.00	CHILD SUPPLEMENT	-9.15	0.00
TRIPLE REDUCTION	0.00	0.00	CHILD SHARE SUPPLEMENT	-2.41	0.00
QUAD REDUCTION	0.00	0.00	INFANT SUPPLEMENT	-100.00	0.00

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

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

About the PCM Details Tab

The PCM Details - General Setup screen contains a number of fields that are completed during the create PCM process (see "Create a PCM " on page 23). The majority of these fields can be altered here if necessary. Descriptions of the additional fields are covered below.

Header Section

Details in this section are dimmed-out (refer to "About the Insert PCM Fields" on page 25 for more information on the details entered).

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

PCM Section

PCM Name

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

PCM Name Alias

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

PCM Status

The status of the PCM can be changed here. There may be different status codes indicating the type of PCM; e.g. Master, Package, Quote etc.

Agent

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

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

Price Code

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

Tax Indicator

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

Currency

The defaulted PCM currency can be changed in this field if required (see "About the Insert PCM Fields" on page 25).

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

(Currency) Subcode

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

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

PCM Type

The PCM Type determines:

a. whether the Group or FIT Costs from the Product Database will be used and
b. whether the PCM can be inserted into either a Group or FIT Booking.

The options are:

- Group PCM:

  Costs from the Group Cost/Sell price columns in the Product Database will be used in the PCM. The PCM can only be inserted into Group Bookings.

- FIT PCM:

  Costs from the FIT Cost/Sell price columns in the Product Database will be used in the PCM. The PCM can only be inserted into FIT bookings.

- No Restrictions:

  Costs from the Group Cost/Sell price columns in the Product Database will be used in the PCM. The PCM can be inserted into both Group Bookings and FIT Bookings. When the PCM is inserted into one of the bookings modules, the correct pricing is selected; e.g. when inserted into a Group Booking, Group pricing from the Product Database is used and when inserted into an FIT booking, the FIT pricing from the Product Database is used.

Pax Range for Child/Infant (Drop-down)

When children/infants are costed in a PCM, the system needs to know on which of the Pax Ranges the Child/Infant rates need to be based. The Child & Infant rates are calculated as a reduction of the adult rate of the Pax Range selected in this drop-down.

Date Entered (Date)

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

Consultant

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

Branch/Department/Reference

The displayed values are from the initial set up.

The Reference field can never be changed. The Branch/Department fields can be changed, however PCM costings may be altered depending on setup of your system.

Analysis Section

Analysis Codes 1 – 6

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

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

Buttons

Copy Button - This button allows users to copy the booking, for more information on copying a booking see the topic called "Copy PCM" on page 75.

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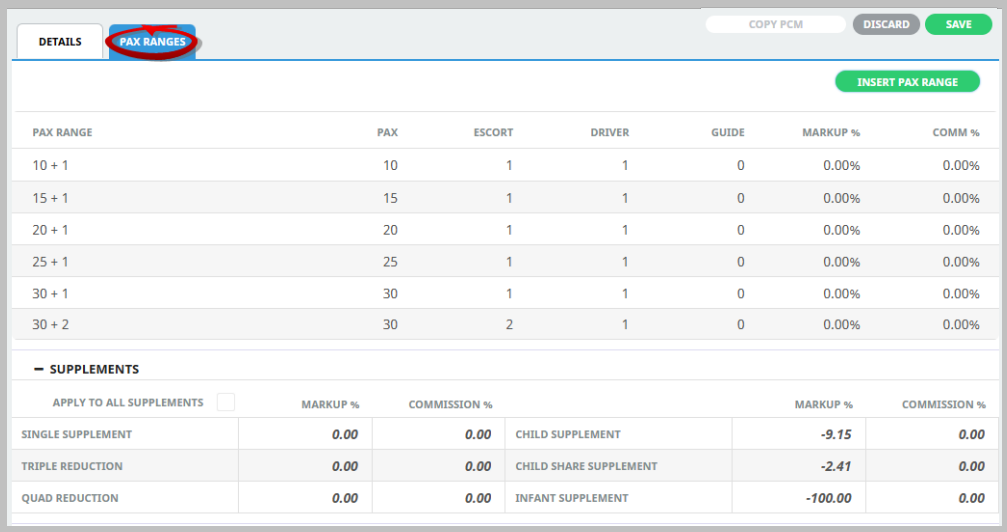
Add or Amend a Pax Range

1. On the *PCM Quotes* > *PCM Details* > *General Setup* screen, under the Pax Ranges tab, update any of the fields that require changes.

This example shows the Pax Range Details screen, which has six existing Pax Ranges.



PAX RANGE	PAX	ESCORT	DRIVER	GUIDE	MARKUP %	COMM %
10 + 1	10	1	1	0	0.00%	0.00%
15 + 1	15	1	1	0	0.00%	0.00%
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%
30 + 2	30	2	1	0	0.00%	0.00%

	MARKUP %	COMMISSION %		MARKUP %	COMMISSION %
SINGLE SUPPLEMENT	0.00	0.00	CHILD SUPPLEMENT	-9.15	0.00
TRIPLE REDUCTION	0.00	0.00	CHILD SHARE SUPPLEMENT	-2.41	0.00
QUAD REDUCTION	0.00	0.00	INFANT SUPPLEMENT	-100.00	0.00

2. To adjust an existing Pax Range, click on the row you want to change. This will bring up the **Pax Range Details** screen with the existing details for that Pax Range. Make the desired changes.

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

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

   c. Click **Delete** to remove the entry and/or discard any changes.

3. To adjust the **Supplements** in the Pax Ranges tab, click the field and make the desired changes.

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

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

4. To Insert a Pax Range select **Insert Pax Range** in the Pax Ranges tab, click in the text box and make the desired changes.

   INSERT PAX RANGE

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

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

   c. Click **Delete** to remove the entry and/or discard any changes.

   DELETE

About the PCM Details Pax Ranges Tab

Pax

Only enter the number of adult Pax for each Pax range. The system will automatically calculate costs and prices for Children, Children sharing and Infants.

Escort

Enter the number of Escorts, if any, for each Pax range. An Escort typically accompanies the group throughout the tour.

NOTE: An Escort may also be referred to as a Group or Tour Leader.

Driver

Enter the number of Drivers, if any, for each Pax range.

NOTE: An entry 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.

Guide

Enter the number of Guides, if any, for each Pax range.

NOTE: A Guide may also be referred to as a Foreign Speaking Guide, Local Guide or FSG.

- If the majority of services in the PCM are going to include a guide and/or driver then enter the guide and driver quantities in this screen. Otherwise enter the guide/driver quantities on a service by service basis as required.
- In some places in this document, Escorts, Drivers and Guides may be collectively referred to as "Staff".

Markup (%)

This markup percentage is applied to the per person twin-share price calculated by Tourplan for every service that is added to this PCM. If the agent record has a default Markup percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required.

NOTE: These fields can be left blank and the markup set once the PCM has all the services added.

Commission (%)

This commission percentage is applied to the per person twin-share price calculated for every service that is added to this PCM. If the agent record has a default Commission percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required.

NOTE: If commissions are not being paid to agents, then these fields can be left blank.

Apply Markup and Commission To

This setting allows Markup and Commission percentages to be configured for one of the following:

- This Pax Range (this is the default setting)
- All Pax Ranges
- Pax Ranges with the Same Values - the same markup % and commission % values

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Supplements Section

Apply to All Supplements

This checkbox when ticked applies Markup and Commission percentages to all Room and Child supplements.

Markup %

This markup percentage is applied to the per person Single Room Supplement, Triple Room Reduction, Quad Room Reduction, Child, Child Sharing and Infant Supplement costs calculated by Tourplan. If the agent record has a default Markup percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required. These fields can be left blank and the markup set once the PCM has all the services added.

Commission %

This commission percentage is applied to the same per person supplements, reduction, child and infant prices. If the agent record has a default Commission percentage value attached to it, then that percentage will have automatically populated these fields. The values can be edited if required. If commissions are not being paid to agents, then these fields can be left blank.

NOTE: The Supplements section can be expanded or contracted by clicking the **–** (contract) or **+** (expand) symbol next to the section heading.

Markup / Commission

This is the second of six tasks described in this user manual for changing PCM details.

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. "General Setup" on page 59
2. "Markup / Commission" above (this task)
3. "PCM Notes" on page 70
4. "Agent Notes" on page 73
5. "Recalculate PCM" on page 74

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

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

Manipulation of supplements totals can occur and if required each supplement type for each service as well. *(This functionality is due out in NX Version 1.4)*

NOTE:

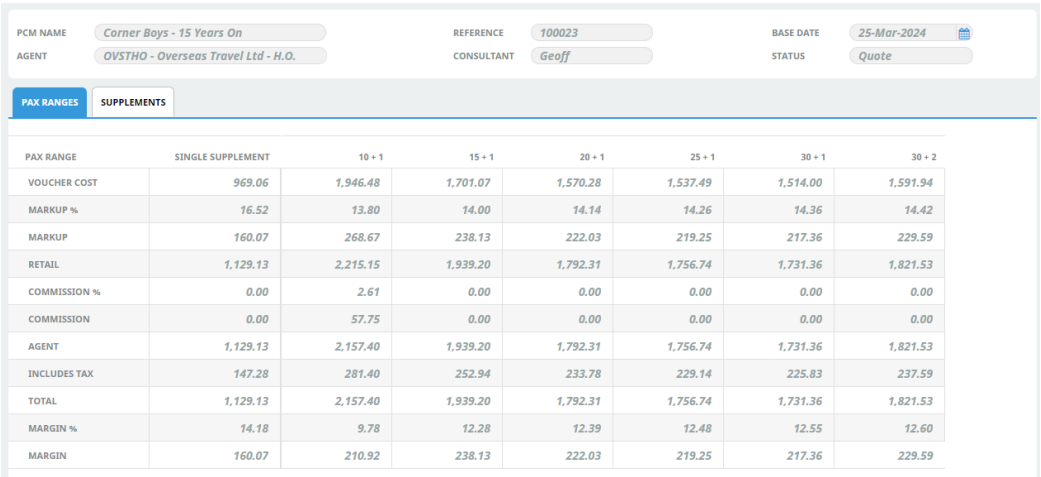
- Any adjustment made here is known as a 'PCM Markup' because it affects the PCM in total. This is treated differently than the 'Product Markup' (applied via price codes or matrix settings) which are at service level. Any adjustment made here will not be visible at service level. It is included in the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

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

Adjust Markup and/or Commission

1. If you haven't already done so, search for and retrieve a PCM to work with (see "Retrieve an Existing PCM" on page 50).

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



PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

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

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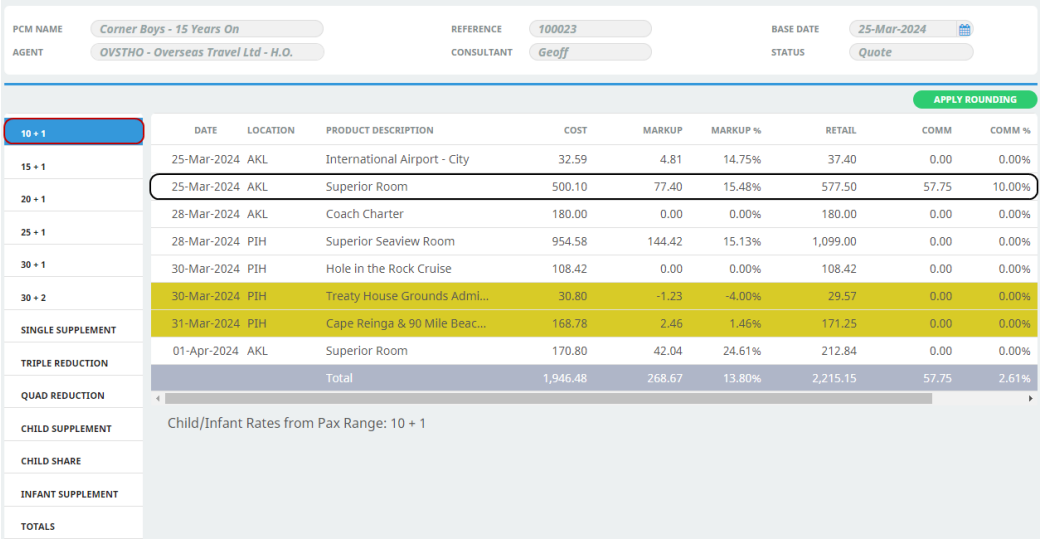
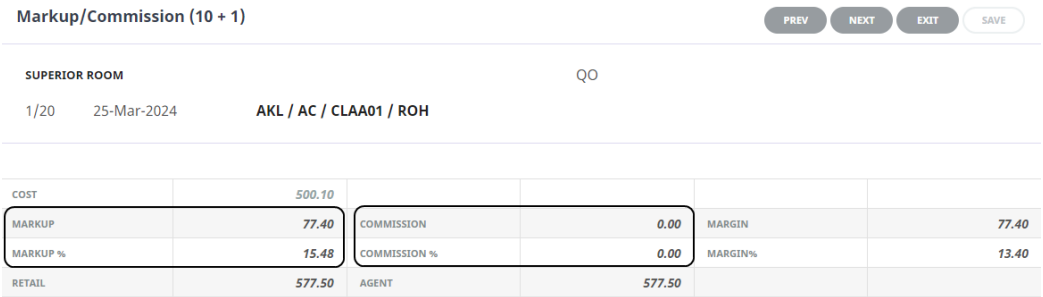
3. Examine the **markup/commission details** on this screen and change any as required by clicking a line to open the Markup/Commission screen.



DATE	LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %
25-Mar-2024	AKL	International Airport - City	32.59	4.81	14.75%	37.40	0.00	0.00%
25-Mar-2024	AKL	Superior Room	500.10	77.40	15.48%	577.50	57.75	10.00%
28-Mar-2024	AKL	Coach Charter	180.00	0.00	0.00%	180.00	0.00	0.00%
28-Mar-2024	PIH	Superior Seaview Room	954.58	144.42	15.13%	1,099.00	0.00	0.00%
30-Mar-2024	PIH	Hole in the Rock Cruise	108.42	0.00	0.00%	108.42	0.00	0.00%
30-Mar-2024	PIH	Treaty House Grounds Admi...	30.80	-1.23	-4.00%	29.57	0.00	0.00%
31-Mar-2024	PIH	Cape Reinga & 90 Mile Beac...	168.78	2.46	1.46%	171.25	0.00	0.00%
01-Apr-2024	AKL	Superior Room	170.80	42.04	24.61%	212.84	0.00	0.00%
		Total	1,946.48	268.67	13.80%	2,215.15	57.75	2.61%

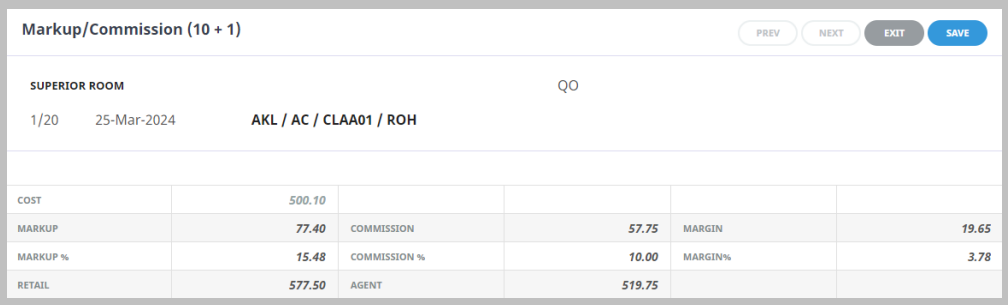
4. Identify the service line to have markup/commission applied and click it. In the screenshot above, the service line chosen is **Superior Room** (second line from top).



COST	500.10				
MARKUP	77.40	COMMISSION	0.00	MARGIN	77.40
MARKUP %	15.48	COMMISSION %	0.00	MARGIN%	13.40
RETAIL	577.50	AGENT	577.50		

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

For example, markup of ***$77.40*** and commission of ***10%***:



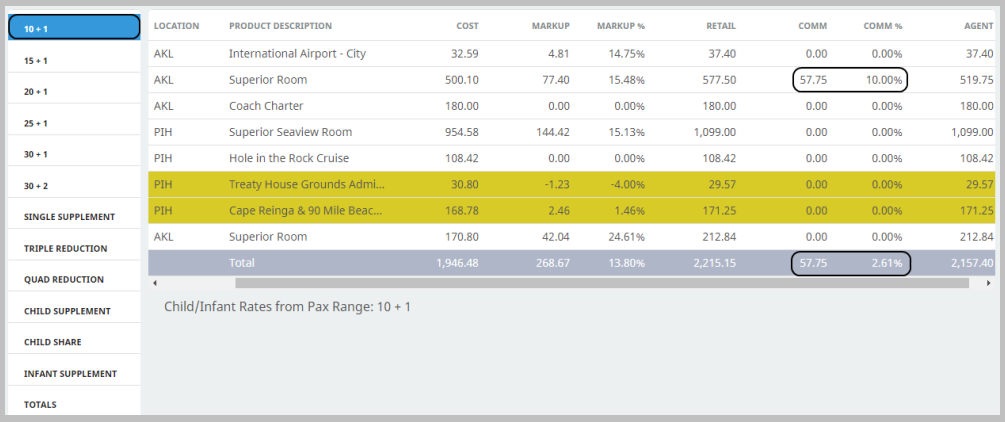
COST	500.10				
MARKUP	77.40	COMMISSION	57.75	MARGIN	19.65
MARKUP %	15.48	COMMISSION %	10.00	MARGIN%	3.78
RETAIL	577.50	AGENT	519.75		

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

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

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

This example shows totals for Corner Boys - 15 Years On (Superior Room) *after* markup and commission has been applied:



LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %	AGENT
AKL	International Airport - City	32.59	4.81	14.75%	37.40	0.00	0.00%	37.40
AKL	Superior Room	500.10	77.40	15.48%	577.50	57.75	10.00%	519.75
AKL	Coach Charter	180.00	0.00	0.00%	180.00	0.00	0.00%	180.00
PIH	Superior Seaview Room	954.58	144.42	15.13%	1,099.00	0.00	0.00%	1,099.00
PIH	Hole in the Rock Cruise	108.42	0.00	0.00%	108.42	0.00	0.00%	108.42
PIH	Treaty House Grounds Admi...	30.80	-1.23	-4.00%	29.57	0.00	0.00%	29.57
PIH	Cape Reinga & 90 Mile Beac...	168.78	2.46	1.46%	171.25	0.00	0.00%	171.25
AKL	Superior Room	170.80	42.04	24.61%	212.84	0.00	0.00%	212.84
	Total	1,946.48	268.67	13.80%	2,215.15	57.75	2.61%	2,157.40

NOTE: The list has been scrolled right to view the *Agent* column.

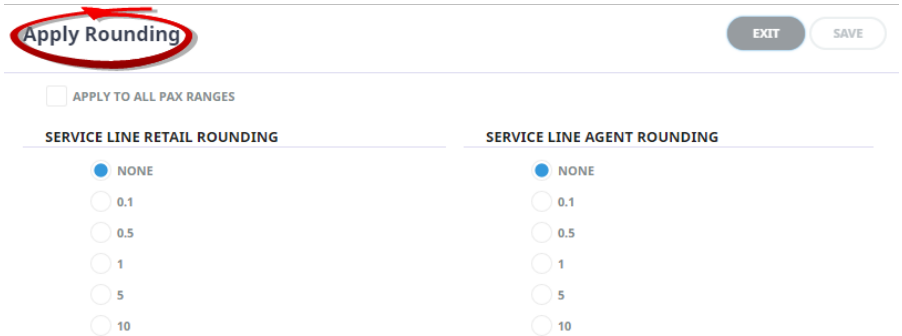
About the Markup/Commission Fields

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

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

Rounding

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



Apply to all Pax Ranges

When checked the system will apply rounding to all pax ranges.

Service Line Retail Rounding

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

Service Line Agent Rounding

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

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Column Headings and Descriptions

LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %	AGENT
KL	International Airport - City	32.59	4.81	14.75%	37.40	0.00	0.00%	37.40
KL	Superior Room	500.10	77.40	15.48%	577.50	57.75	10.00%	519.75
KL	Coach Charter	180.00	0.00	0.00%	180.00	0.00	0.00%	180.00
H	Superior Seaview Room	954.58	144.42	15.13%	1,099.00	0.00	0.00%	1,099.00
H	Hole in the Rock Cruise	108.42	0.00	0.00%	108.42	0.00	0.00%	108.42
H	Treaty House Grounds Admi...	30.80	-1.23	-4.00%	29.57	0.00	0.00%	29.57
H	Cape Reinga & 90 Mile Beac...	168.78	2.46	1.46%	171.25	0.00	0.00%	171.25
KL	Superior Room	170.80	42.04	24.61%	212.84	0.00	0.00%	212.84
	Total	1,946.48	268.67	13.80%	2,215.15	57.75	2.61%	2,157.40

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

Please refer to "Appendix 1 - Scroll Column Headings" on page 128 for a list of column selections available for the "PCM Quotes (PCM Packages) Markup Commission Columns" on page 128 Markup Commission Columns.

PCM Notes

This is the third of six tasks described in this user manual for changing PCM details.

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. "General Setup" on page 59
2. "Markup / Commission" on page 66
3. "PCM Notes" above (this task)
4. "Agent Notes" on page 73
5. "Recalculate PCM" on page 74

There are PCM Notes and Agent Notes:

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

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

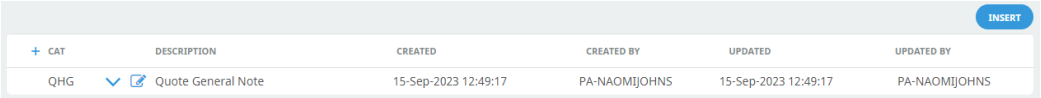
Insert/Modify a Booking Note

1. If you haven't already done so, search for and retrieve a PCM to work with (see "Retrieve an Existing PCM" on page 50).

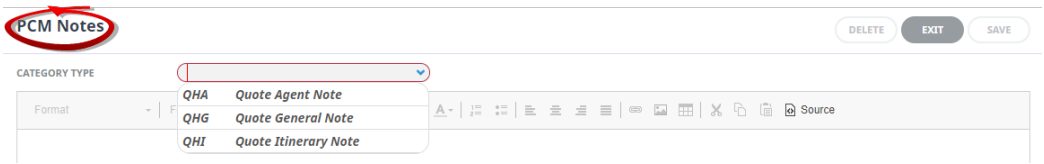
2. The default view for a PCM is the **Dashboard View**.

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

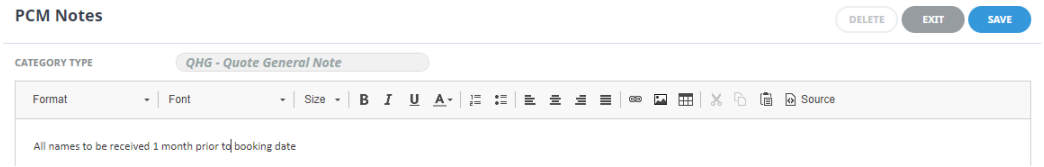
4. From the list of **PCM Notes** returned, click any existing note to open it. To add a note, click *Insert*.



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



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



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

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

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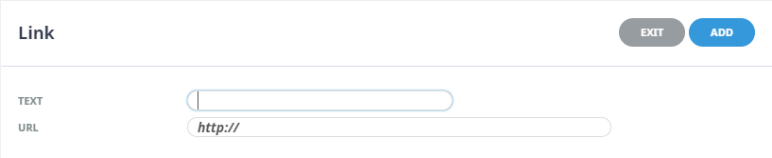
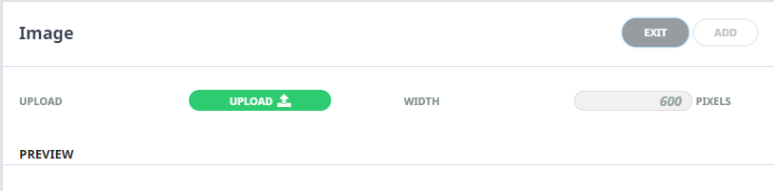
NOTE: If you are using multi language note categories, a further field selection to assign a language occurs. This allows language alternative text to be inserted within a booking note and if message templates are configured to use multi language notes then the note information will be generated using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

About PCM Notes Formatting Fields

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

The Editing screen has the following items:

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

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

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Agent Notes

This is the fourth of six tasks described in this user manual for changing PCM details.

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. "General Setup" on page 59
2. "Markup / Commission" on page 66
3. "PCM Notes" on page 70
4. "Agent Notes" above (this task)
5. "Recalculate PCM" on the next page

There are PCM Notes and Agent Notes:

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

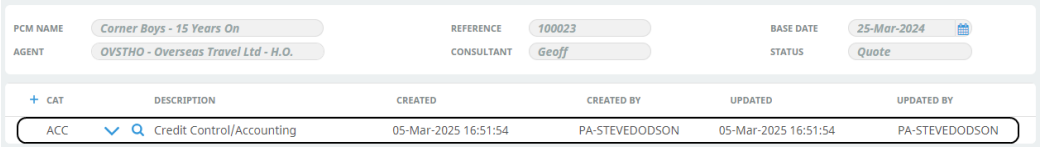
View Agent Notes (Read-Only)

1. If you haven't already done so, search for and retrieve a PCM to work with (see "Retrieve an Existing PCM" on page 50).

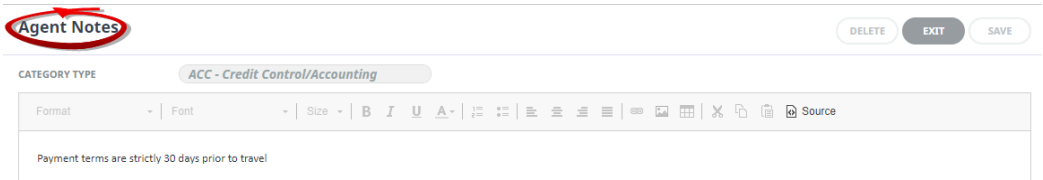
2. The default view for a PCM is the **Dashboard View**.

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

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



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



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

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

Recalculate PCM

This is the fifth of six tasks described in this user manual for changing PCM details.

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. "General Setup" on page 59
2. "Markup / Commission" on page 66
3. "PCM Notes" on page 70
4. "Agent Notes" on the previous page
5. "Recalculate PCM" above (this task)

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

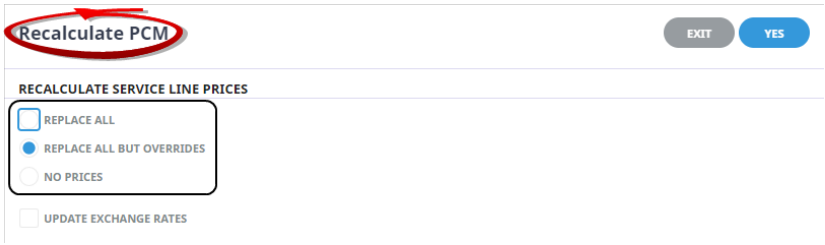
Recalculate PCM

1. If you haven't already done so, search for and retrieve a PCM to work with (see "Retrieve an Existing PCM" on page 50).

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

   From the PCM Quotes menu, select **PCM Quotes > PCM Details > Recalculate**.

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



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

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

About the Recalculate PCM Fields

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.

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Copy PCM

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

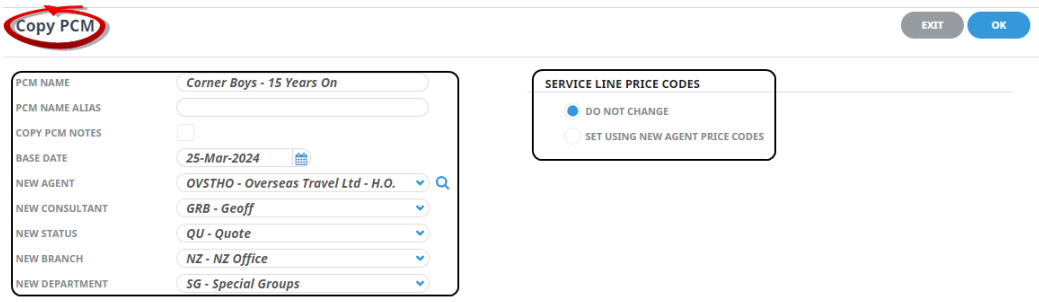
Copy PCM

1. If you haven't already done so, search for and retrieve a PCM to work with (see "Retrieve an Existing PCM" on page 50).

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

   From the PCM Quotes menu, select **PCM Quotes > PCM Details > General Setup** click **Copy PCM**.

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



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

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

About the Copy PCM Fields

PCM Name

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

New PCM Name Alias

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

Copy PCM Notes

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

Base Date

Enter the new base date (if applicable) for the new PCM.

New Agent

An alternative agent can be selected if required.

New Consultant

Select the Consultant Code as required.

New Status

Select the new (booking) status as required.

New Branch

An alternative branch can be selected if required.

New Department

An alternative department can be selected if required.

Service Line Price Codes

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

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

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CHAPTER 5

Working with PCM Itineraries

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

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

In this chapter ...

Itinerary View 78
Pickup / Dropoff 79
Voucher Text 84
Service Notes 89
Product Notes 95
Change Base Date 98
Manage Days 100
Insert PCM 104

TOURPLAN

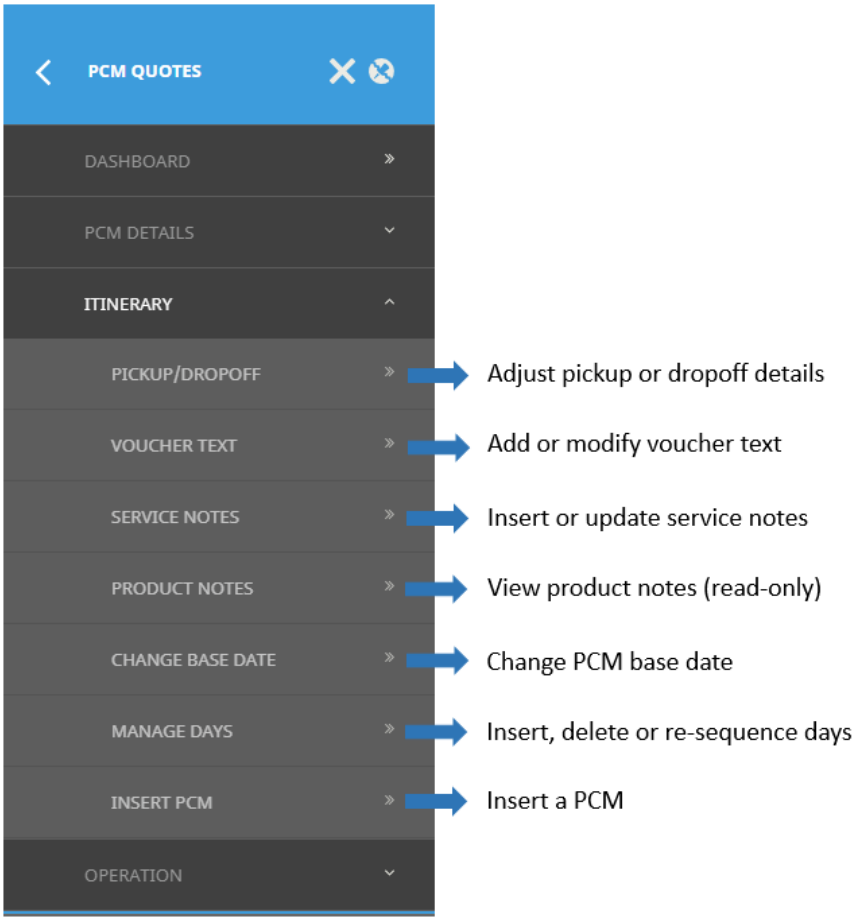
Itinerary View

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

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

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

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



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Pickup / Dropoff

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

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

The full list is:

1. "Pickup / Dropoff" above (this task)
2. "Voucher Text" on page 84
3. "Service Notes" on page 89
4. "Product Notes" on page 95
5. "Change Base Date" on page 98
6. "Manage Days" on page 100
7. "Insert PCM" on page 104

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

NOTE:

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

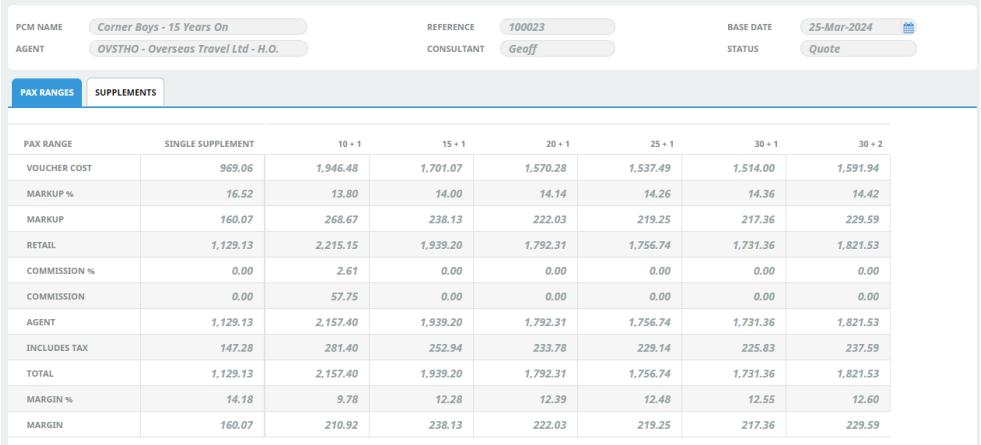
It is understood that in an ad-hoc quotation, it is unlikely that Pickup/Dropoff details will be entered. For PCMs that are created as 'Packages', in cases where the PCM is being inserted into a booking as a package and the Pickup/Dropoff details are consistent; e.g. scheduled transport times, then they should be entered here. When the PCM is inserted into a booking, the Pickup/Dropoff details entered in the PCM will copy into the booking, thus saving re-entering the detail.

Add/Adjust Pickup or Dropoff Details

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Switch to the **Itinerary View** of the PCM.

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



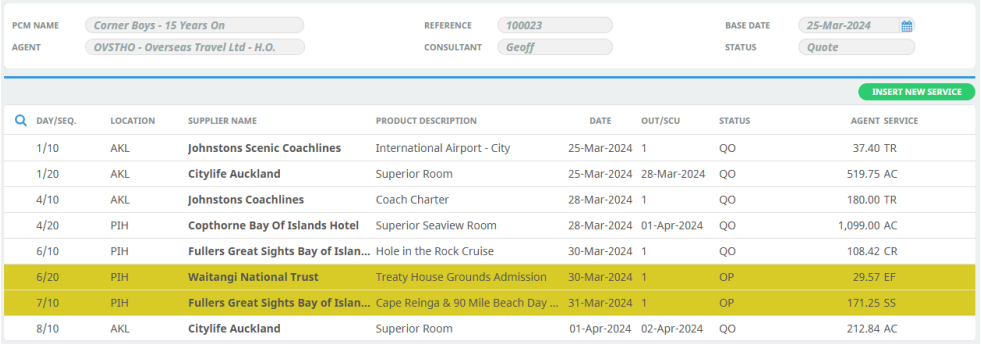
PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

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

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

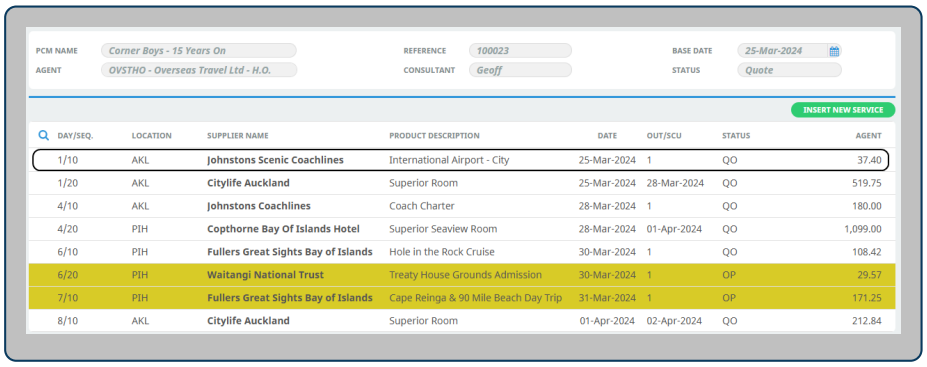


PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT SERVICE
1/10	AKL	**Johnstons Scenic Coachlines**	International Airport - City	25-Mar-2024	1	QO	37.40 TR
1/20	AKL	**Citylife Auckland**	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75 AC
4/10	AKL	**Johnstons Coachlines**	Coach Charter	28-Mar-2024	1	QO	180.00 TR
4/20	PIH	**Copthorne Bay Of Islands Hotel**	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00 AC
6/10	PIH	**Fullers Great Sights Bay of Islan...**	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42 CR
6/20	PIH	**Waitangi National Trust**	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57 EF
7/10	PIH	**Fullers Great Sights Bay of Islan...**	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25 SS
8/10	AKL	**Citylife Auckland**	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84 AC

3. There are two ways to add or change pickup/dropoff details from the Itinerary view:
   a. Change pickup/dropoff via *service drill-down*:
      i. From the Itinerary view, select the **service** whose details you want to change to open the *Service Details* screen.



PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	**Johnstons Scenic Coachlines**	International Airport - City	25-Mar-2024	1	QO	37.40
1/20	AKL	**Citylife Auckland**	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75
4/10	AKL	**Johnstons Coachlines**	Coach Charter	28-Mar-2024	1	QO	180.00
4/20	PIH	**Copthorne Bay Of Islands Hotel**	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00
6/10	PIH	**Fullers Great Sights Bay of Islands**	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42
6/20	PIH	**Waitangi National Trust**	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57
7/10	PIH	**Fullers Great Sights Bay of Islands**	Cape Reinga & 90 Mile Beach Day Trip	31-Mar-2024	1	OP	171.25
8/10	AKL	**Citylife Auckland**	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84

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

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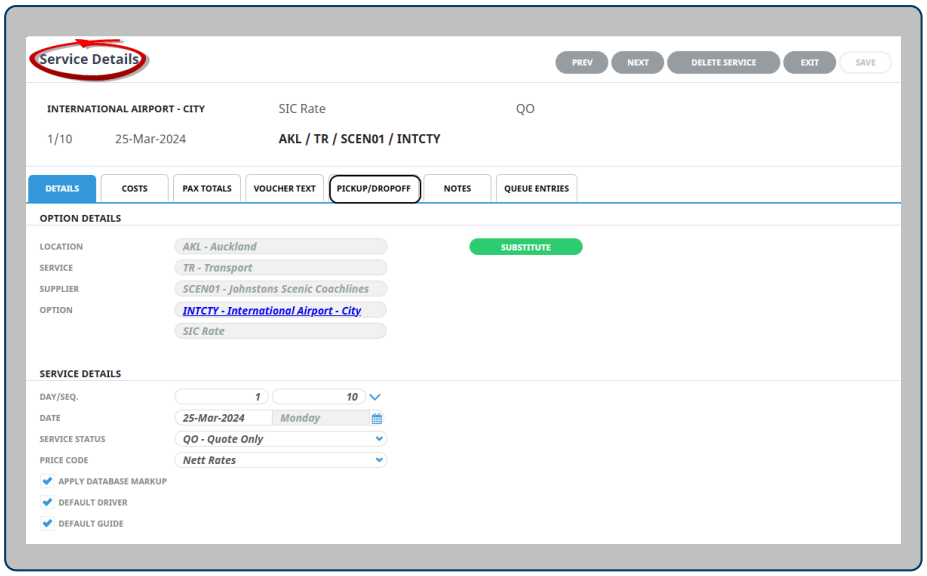
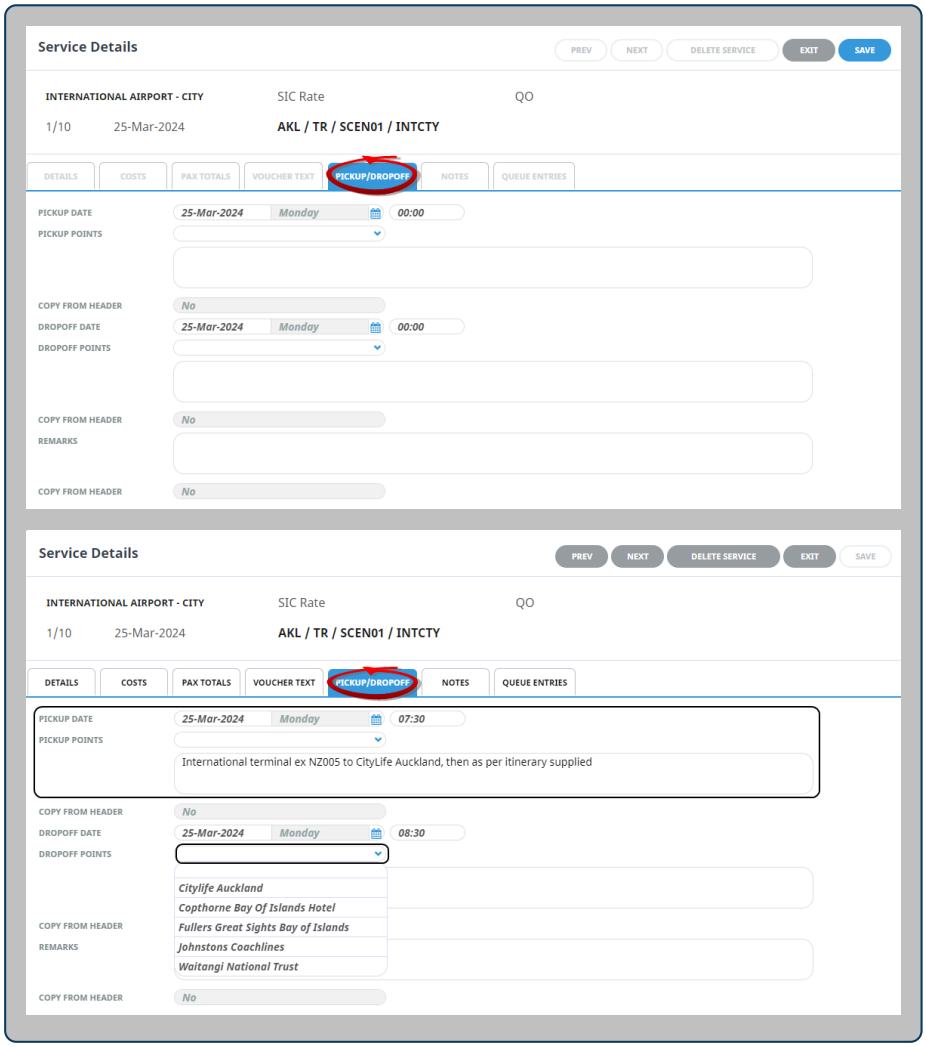


iii. On the **Pickup/Dropoff** tab, modify details as required.

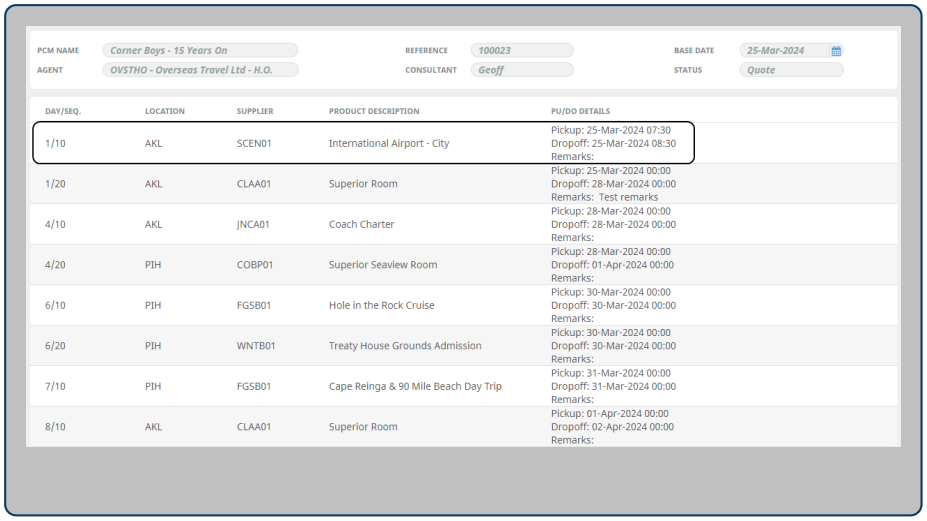


iv. Click **Save** to keep the changes, followed by **Exit** to return to the list of PU/DO Details, or use the **Previous** and **Next** buttons to update other services in the itinerary list.

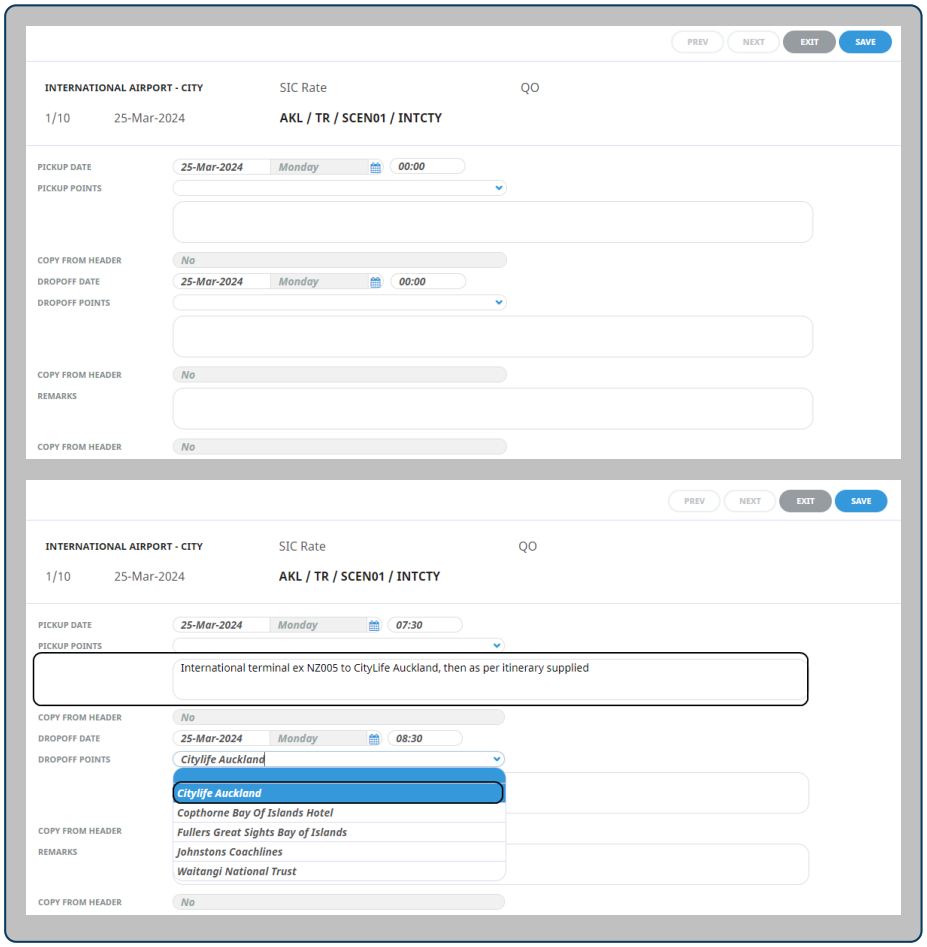
b. Change pickup/dropoff details via the *PCM Quotes* menu:

i. Select menu **PCM Quotes > Itinerary > Pickup/Dropoff**.

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



iii. On the **pickup/dropoff** screen (there is no heading label), modify fields as required.



iv. Click **Save** to keep the changes, followed by **Exit** to return to the list of PU/DO Details,

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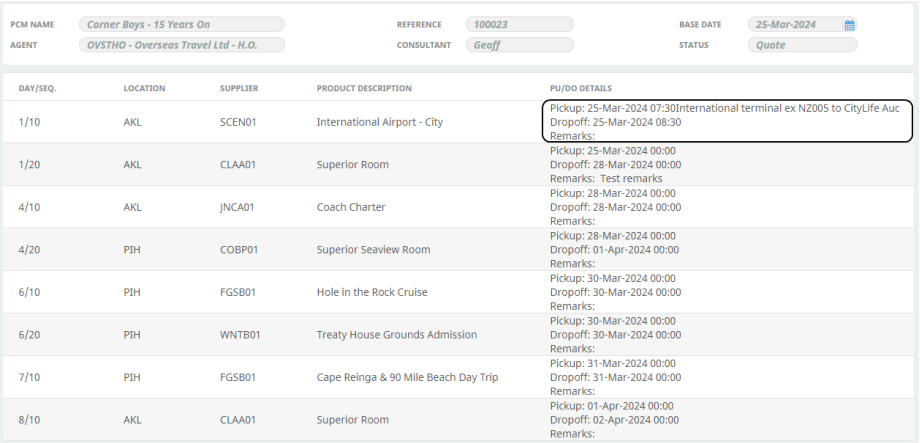
or use the **Previous** and **Next** buttons to update other services in the itinerary list.

v. Saved **Pickup/Dropoff Details** will be recorded in the Pickup/Drop off list.



PCM NAME	Corner Boys - 15 Years On	REFERENCE	100023	BASE DATE	25-Mar-2024
AGENT	OVSTHO - Overseas Travel Ltd - H.O.	CONSULTANT	Geoff	STATUS	Quote

DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	PU/DO DETAILS
1/10	AKL	SCEN01	International Airport - City	Pickup: 25-Mar-2024 07:30International terminal ex NZ005 to CityLife Auc Dropoff: 25-Mar-2024 08:30 Remarks:
1/20	AKL	CLAA01	Superior Room	Pickup: 25-Mar-2024 00:00 Dropoff: 28-Mar-2024 00:00 Remarks: Test remarks
4/10	AKL	JNCA01	Coach Charter	Pickup: 28-Mar-2024 00:00 Dropoff: 28-Mar-2024 00:00 Remarks:
4/20	PIH	COBP01	Superior Seaview Room	Pickup: 28-Mar-2024 00:00 Dropoff: 01-Apr-2024 00:00 Remarks:
6/10	PIH	FGSB01	Hole in the Rock Cruise	Pickup: 30-Mar-2024 00:00 Dropoff: 30-Mar-2024 00:00 Remarks:
6/20	PIH	WNTB01	Treaty House Grounds Admission	Pickup: 30-Mar-2024 00:00 Dropoff: 30-Mar-2024 00:00 Remarks:
7/10	PIH	FGSB01	Cape Reinga & 90 Mile Beach Day Trip	Pickup: 31-Mar-2024 00:00 Dropoff: 31-Mar-2024 00:00 Remarks:
8/10	AKL	CLAA01	Superior Room	Pickup: 01-Apr-2024 00:00 Dropoff: 02-Apr-2024 00:00 Remarks:

About the Pickup / Dropoff Fields

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

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

Refer to "Add Services to a PCM" on page 31 for more information on adding additional services.

Voucher Text

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

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

The full list is:

1. "Pickup / Dropoff" on page 79
2. "Voucher Text" above (this task)
3. "Service Notes" on page 89
4. "Product Notes" on page 95
5. "Change Base Date" on page 98
6. "Manage Days" on page 100
7. "Insert PCM" on page 104

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

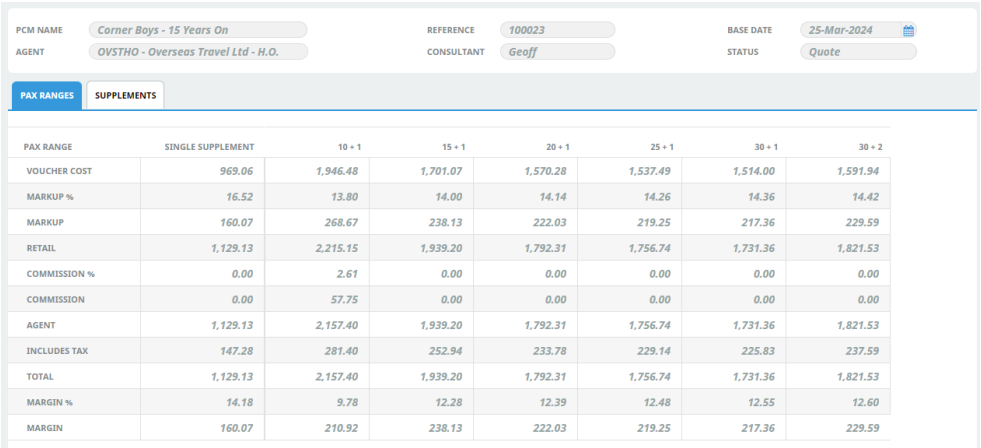
NOTE: It is not uncommon for there to be no voucher text attached to services. The actual voucher template setup in Messaging enables most data that is required to be printed on vouchers to be incorporated into the voucher document without needing any additional text in these fields.

Add or Modify Voucher Text

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Switch to the **Itinerary View** of the PCM.

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



PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

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

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

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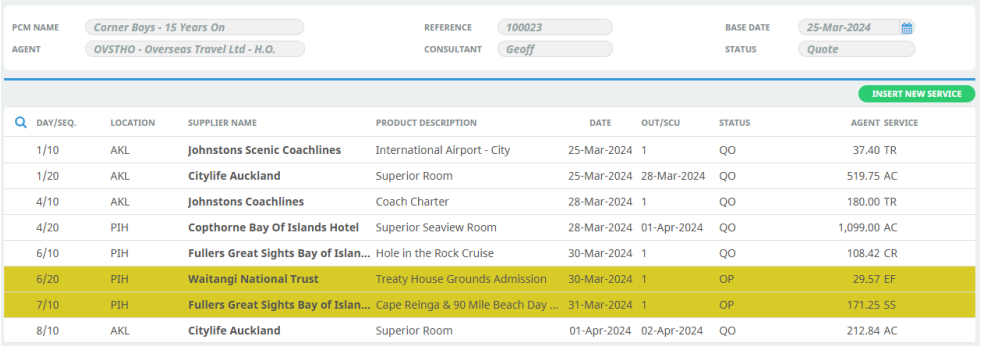
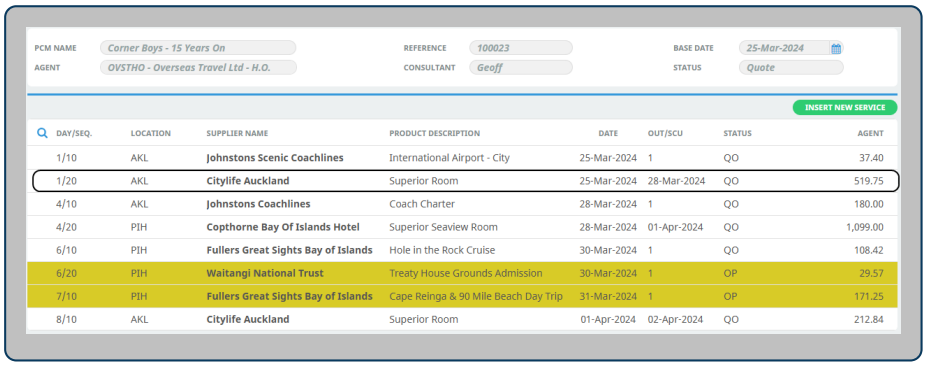


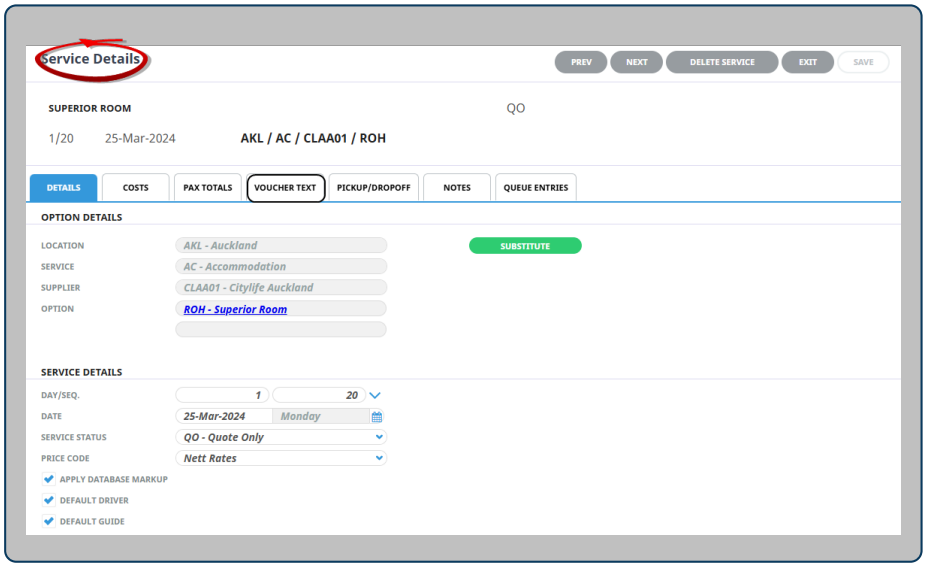
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT SERVICE
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40 TR
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75 AC
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00 TR
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00 AC
6/10	PIH	Fullers Great Sights Bay of Islan...	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42 CR
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57 EF
7/10	PIH	Fullers Great Sights Bay of Islan...	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25 SS
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84 AC

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

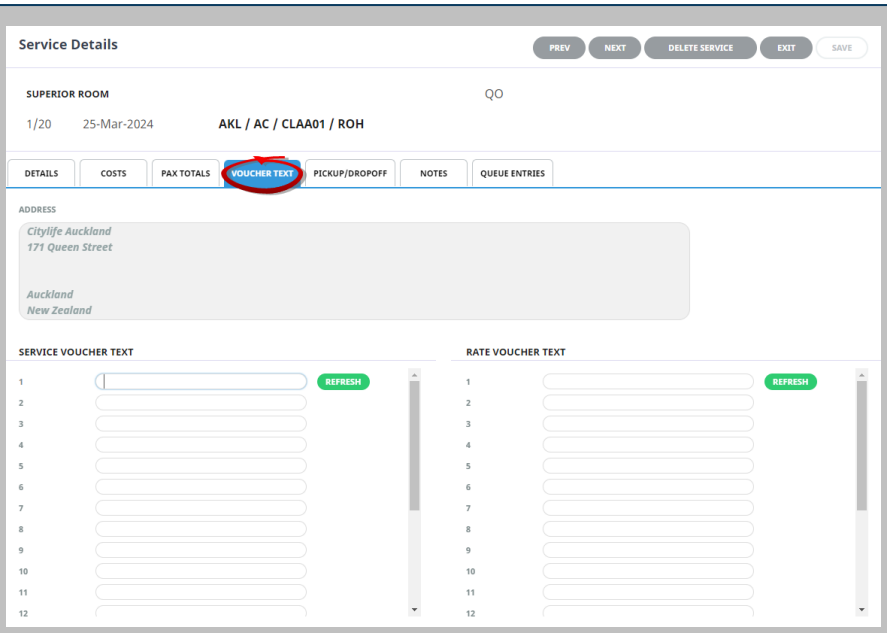


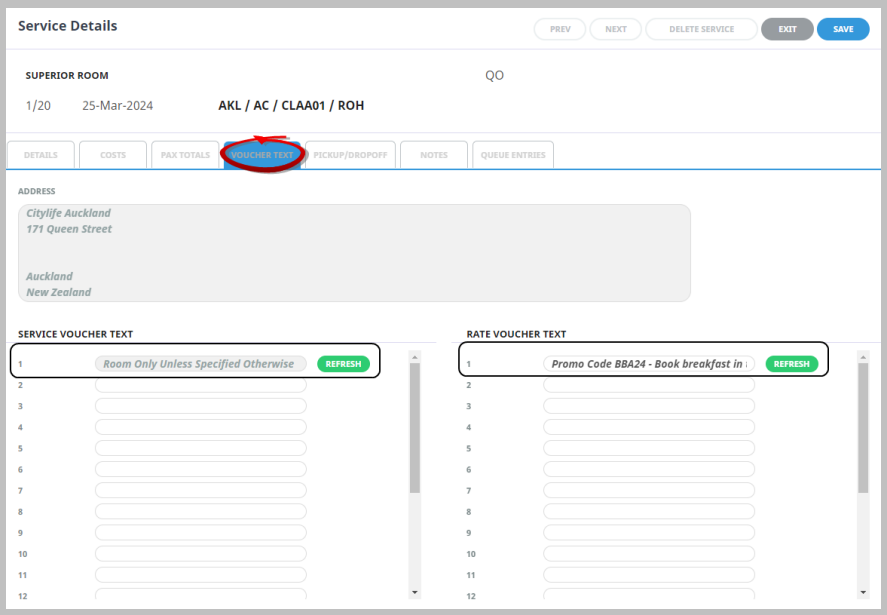
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00
6/10	PIH	Fullers Great Sights Bay of Islands	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57
7/10	PIH	Fullers Great Sights Bay of Islands	Cape Reinga & 90 Mile Beach Day Trip	31-Mar-2024	1	OP	171.25
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84

      ii. On the **Service Details** screen, click *the Voucher Text* tab.



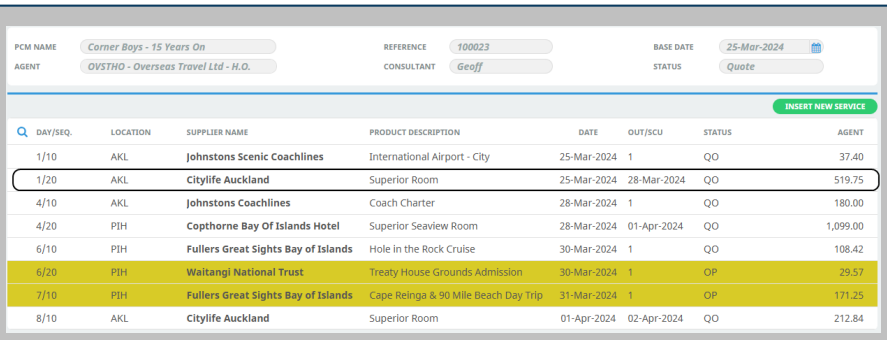
      iii. On the **Voucher Text** tab, modify details as required.





The example above displays Service Voucher Text on line one, this information has transferred from the product voucher text an in a booking is read only. The Rate Voucher Text however can be edited in the booking.

iv. Click **Save** to keep the changes, followed by **Exit** to return to the Itinerary.



DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00
6/10	PIH	Fullers Great Sights Bay of Islands	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57
7/10	PIH	Fullers Great Sights Bay of Islands	Cape Reinga & 90 Mile Beach Day Trip	31-Mar-2024	1	OP	171.25
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84

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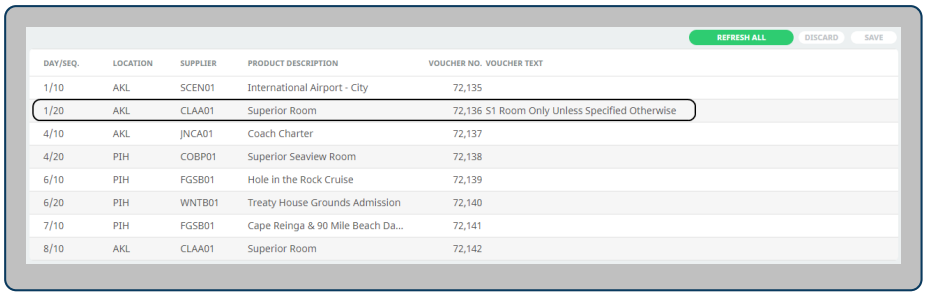
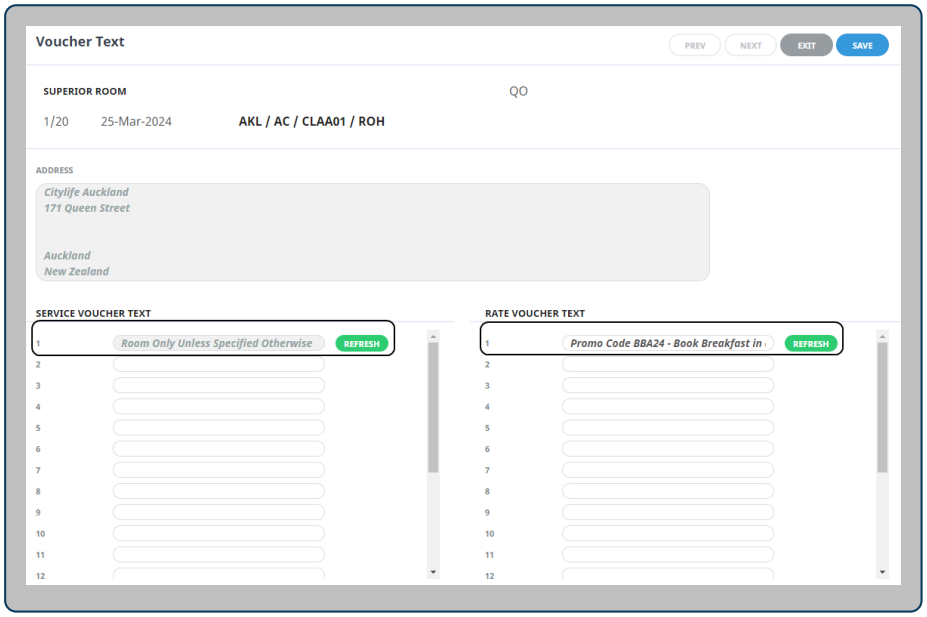
b. Change voucher text details via the *PCM Quotes* menu:

i. Select menu **PCM Quotes > Itinerary > Voucher Text**.

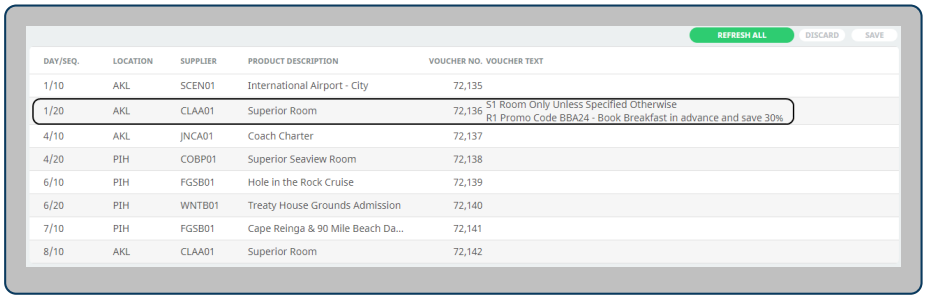
ii. Click the **service** whose Voucher details you want to change.



iii. On the **Voucher Text** screen, modify fields as required.



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



About the Voucher Text Fields

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

NOTE:

- If text in a field is dimmed out, it is read-only and cannot be edited.
- Any voucher text fields which have items inside <chevron brackets> must *not* be edited. The codes inside the brackets will be translated when the vouchers are output.

- Each voucher text field has a maximum of 60 characters.
- Using the same Voucher text numbered fields for consistent data entry is advised.

Refresh buttons

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

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Service Notes

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

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

The full list is:

1. "Pickup / Dropoff" on page 79
2. "Voucher Text" on page 84
3. "Service Notes" above (this task)
4. "Product Notes" on page 95
5. "Change Base Date" on page 98
6. "Manage Days" on page 100
7. "Insert PCM" on page 104

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

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

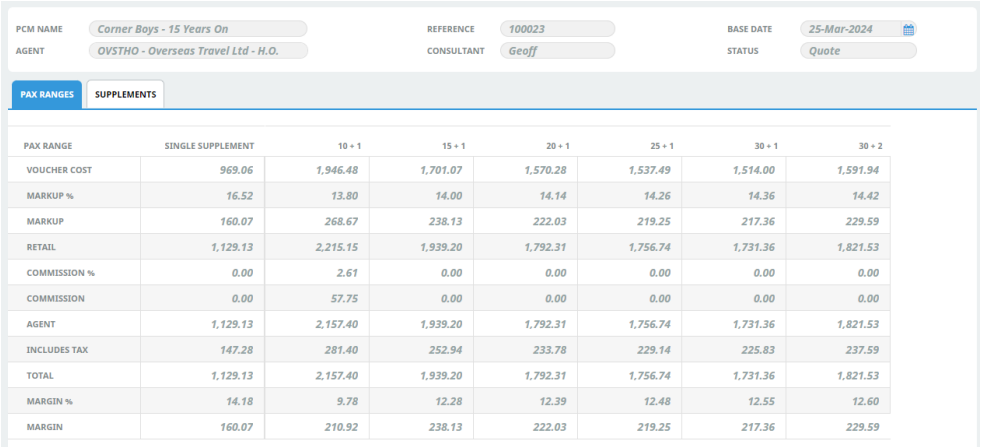
The note category (in Code Setup) will need to be set to 'Include in Messaging'

Insert or Update Service Notes

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Switch to the **Itinerary View**.

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



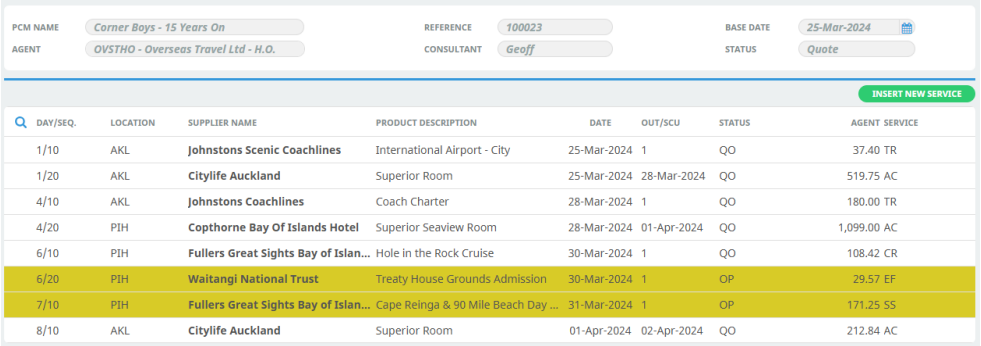
PCM NAME: Corner Bays - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

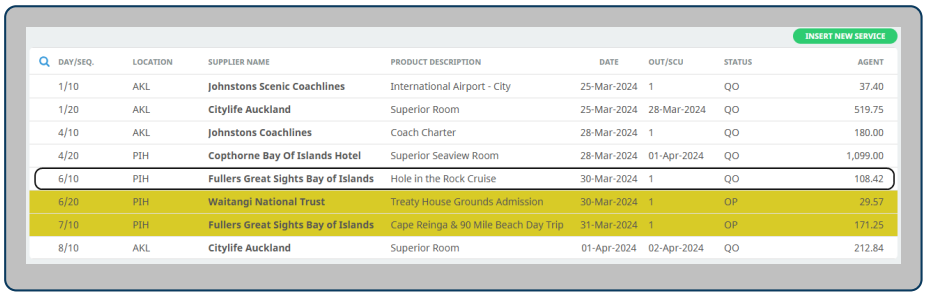
   b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the PCM Quotes menu, **PCM Quotes > Itinerary**.

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



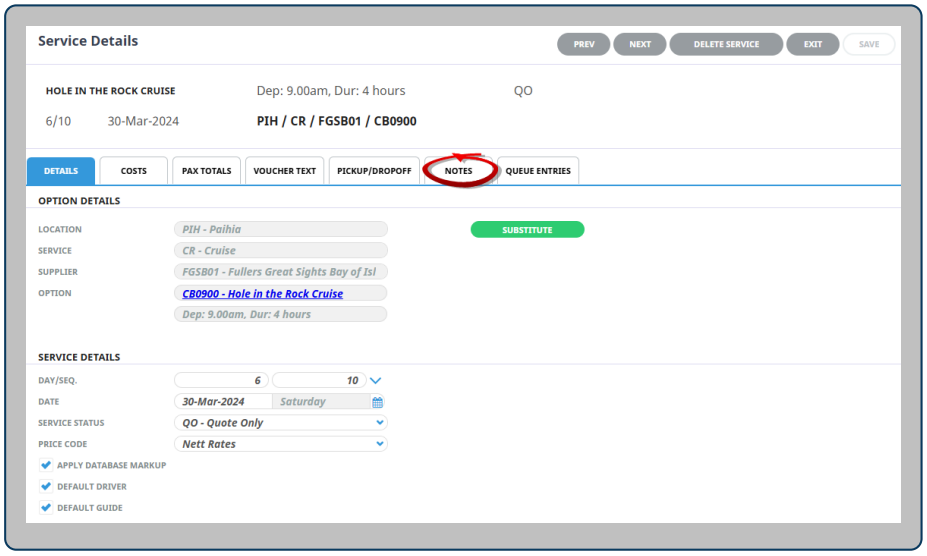
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT SERVICE
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40 TR
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75 AC
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00 TR
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00 AC
6/10	PIH	Fullers Great Sights Bay of Islan...	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42 CR
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57 EF
7/10	PIH	Fullers Great Sights Bay of Islan...	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25 SS
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84 AC

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

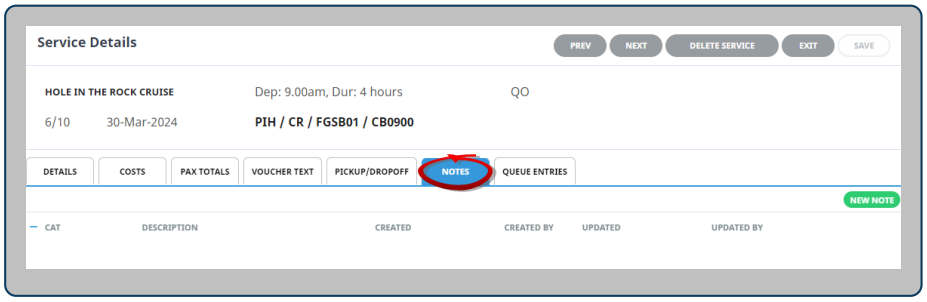


DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00
6/10	PIH	Fullers Great Sights Bay of Islands	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57
7/10	PIH	Fullers Great Sights Bay of Islands	Cape Reinga & 90 Mile Beach Day Trip	31-Mar-2024	1	OP	171.25
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84

      ii. On the **Service Details** screen, click *the Notes Text* tab.



      iii. On the **Notes** tab, click *New Note* and modify details as required.



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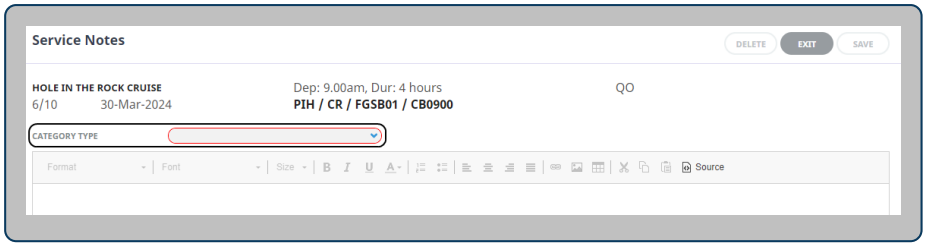
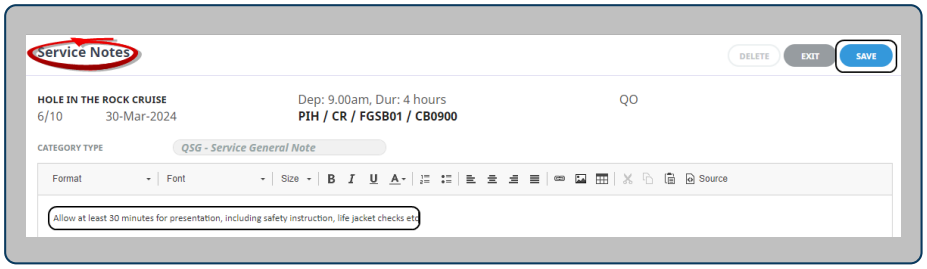
iv. Select a **Category Type**.



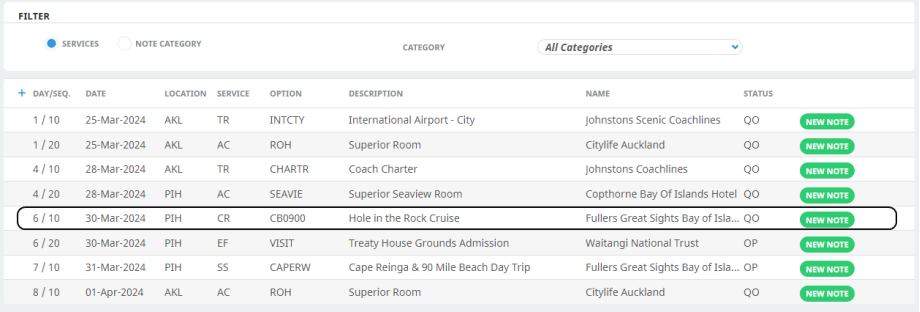
v. Enter the note information, click **Save** to keep the changes, followed by **Exit** to return to the Itinerary.



b. Change Service Notes details via the *PCM Quotes* menu:

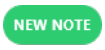
i. Select menu **PCM Quotes > Itinerary > Service Notes**.

ii. From the **list of services**, identify the service that is to have a new note added.

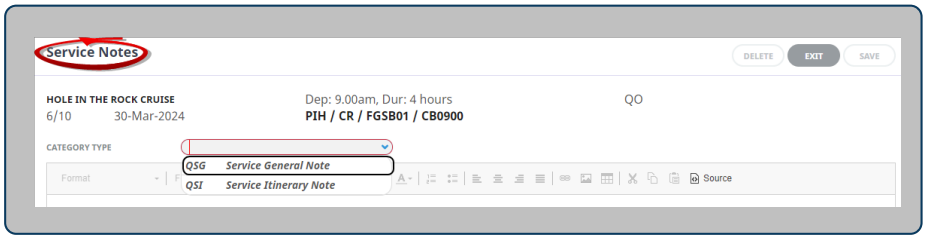


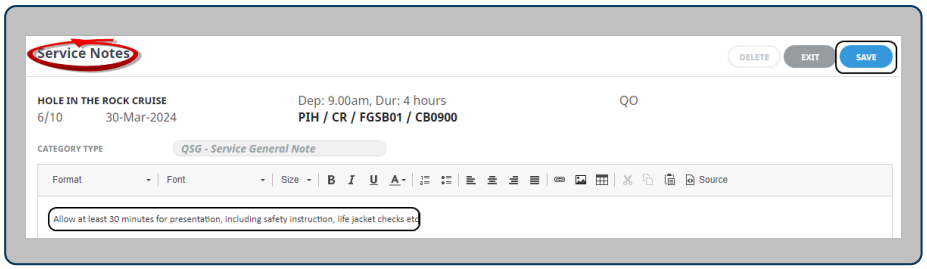
NOTE: Notes are presented in summary view, one line per service. You can expand all notes to show full details by clicking the blue **+** symbol next to the Day/Seq column heading. Alternatively, you can click the **+** symbol alongside any service to expand the note (s) for just that service.

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

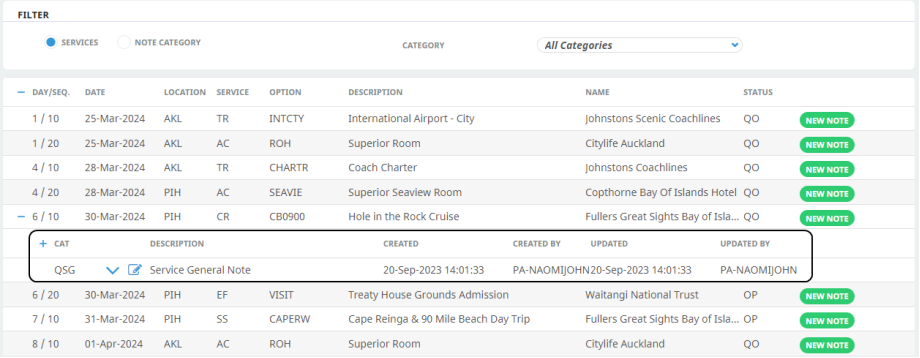


iv. On the **Service Notes** screen, select a Category Type from the drop-down and enter the text of the note as illustrated in the example.





v. Once details are entered, click **Save** to keep the note and return to the list. The note is now available to view, otherwise, click **Exit**.



About the Service Notes Fields

- Whether the note detail is output is determined by the design of the document template, not selections on this screen.
- There could be many more categories of Service Notes – for example, one for general information; one for accounts information; one for additional itinerary information. By clicking on each of these categories, the notes that have previously been entered (if any) for the service can be viewed.
- Unlimited text can be added under each category. A Date and Time stamp will be attached to each Note, reflecting the last time it was updated.

> The Note categories must first be setup in Code Setup.
> (see System Setup User Manual Messaging > Notes).

Service Note Filtering

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

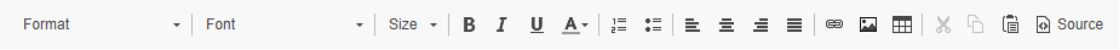
A filter can be applied to target and display a specific Note Category. This is useful for consultants who may want to view or insert a series of service notes with information saved for a particular Note Category.

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

About the Service Notes Formatting Fields

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

The Editing screen has the following items:



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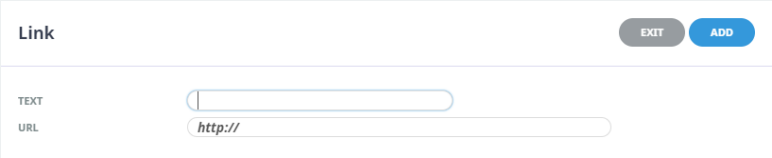
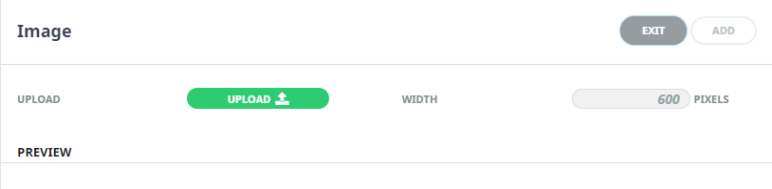
Format type	Format Option Descriptions
Format	Format of the paragraph text. Normal, Headings 1,2,3,4,5, & 6, Formatted, Address,
Font	Font of text (will default from the INI Setting DEFAULTFONT)
Size	Font Size of text (will default from the INI Setting DEFAULTEDITFONTSIZE)
	Style, Font and Font Size.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

Format type	Format Option Descriptions
	Paste text (Ctrl+V) place the cursor at the point where copied/cut text is to be placed and click this button
Source	Selecting this button will show the text editor in CSS styling source code

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Product Notes

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

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

The full list is:

1. "Pickup / Dropoff" on page 79
2. "Voucher Text" on page 84
3. "Service Notes" on page 89
4. "Product Notes" above (this task)
5. "Change Base Date" on page 98
6. "Manage Days" on page 100
7. "Insert PCM" on page 104

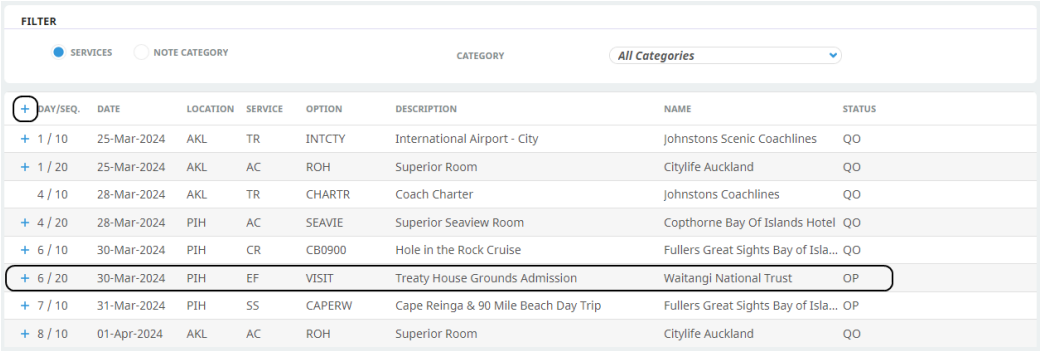
The Product Notes screen allows **viewing only** of any notes that might be attached to a product. Adding, modifying or deleting product notes is done via Product Setup (see the Product User Manual).

View Product Notes

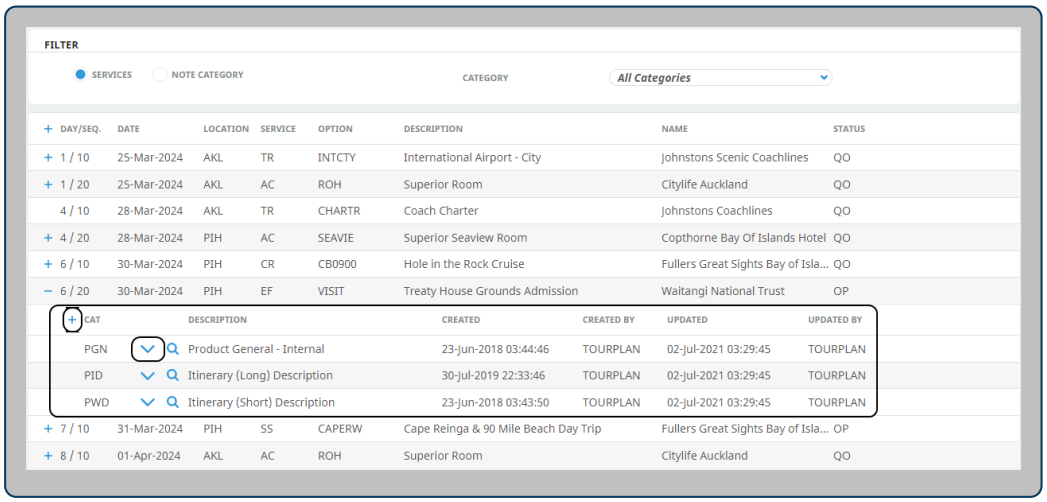
1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

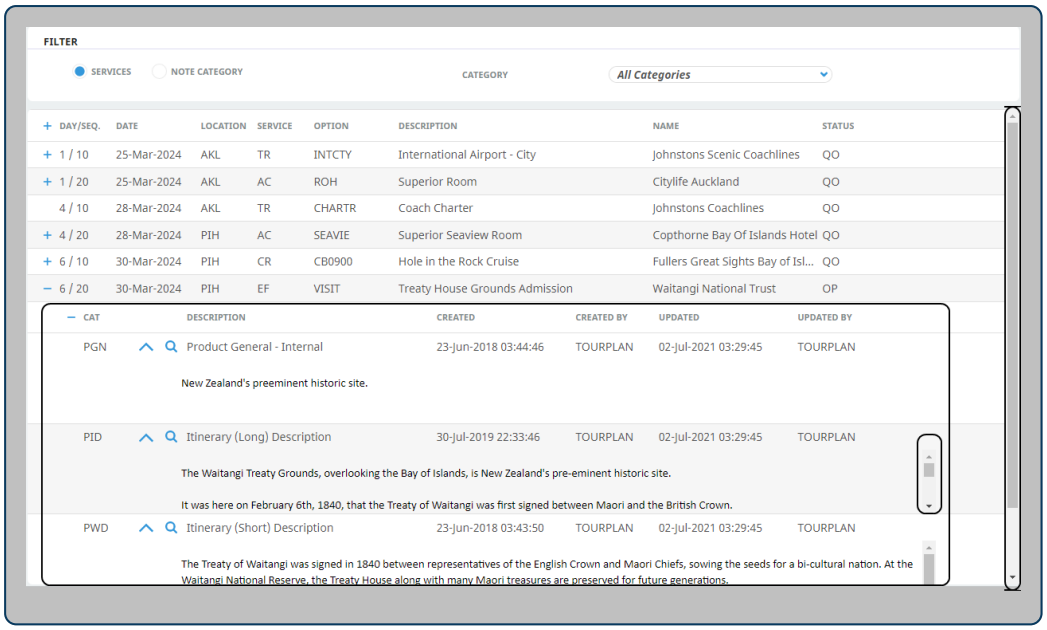
2. Select menu **PCM Quotes > Itinerary > Product Notes**.

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



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





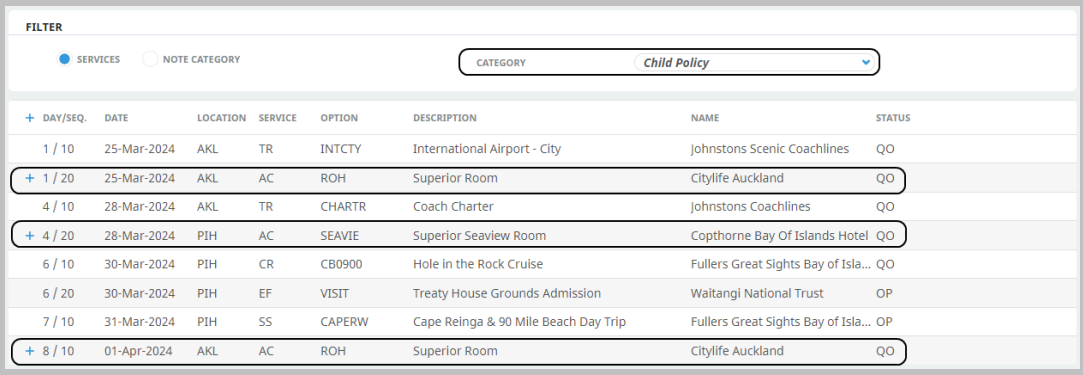
From the expanded list, view content associated with each note by clicking the **down** icon or using the scroll bars.

Note Filtering

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

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

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



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

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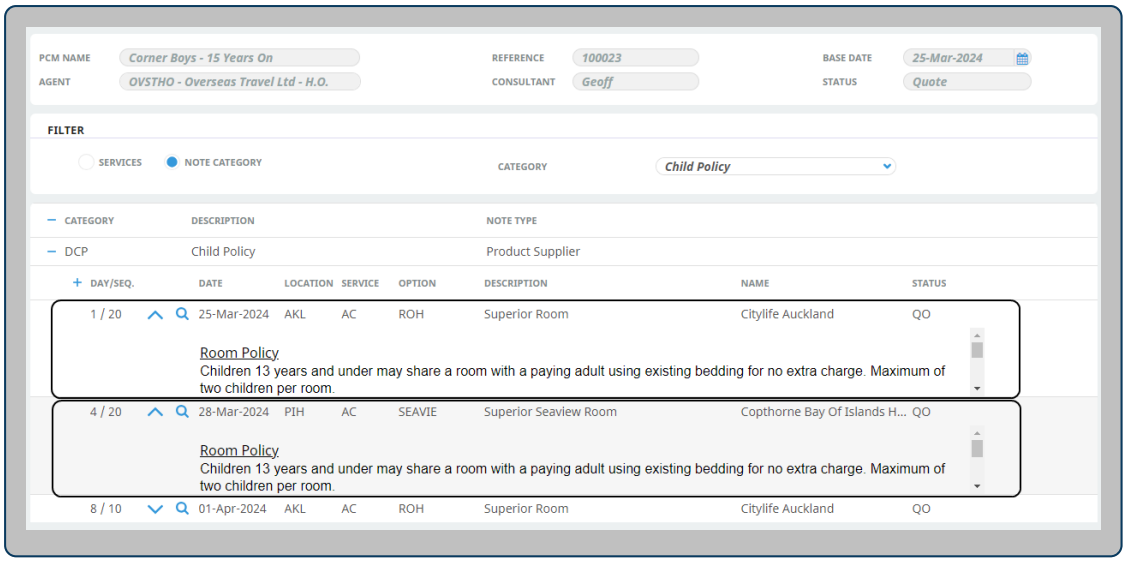

PCM NAME
Corner Boys - 15 Years On
REFERENCE
100023
BASE DATE
25-Mar-2024
AGENT
OVSTHO - Overseas Travel Ltd - H.O.
CONSULTANT
Geoff
STATUS
Quote
FILTER
SERVICES
NOTE CATEGORY
CATEGORY
Child Policy
CATEGORY
DESCRIPTION
NOTE TYPE
DCP
Child Policy
Product Supplier
DAY/SEQ.
DATE
LOCATION
SERVICE
OPTION
DESCRIPTION
NAME
STATUS
1 / 20
25-Mar-2024
AKL
AC
ROH
Superior Room
Citylife Auckland
QO
Room Policy
Children 13 years and under may share a room with a paying adult using existing bedding for no extra charge. Maximum of two children per room.
4 / 20
28-Mar-2024
PIH
AC
SEAVIE
Superior Seaview Room
Copthorne Bay Of Islands H...
QO
Room Policy
Children 13 years and under may share a room with a paying adult using existing bedding for no extra charge. Maximum of two children per room.
8 / 10
01-Apr-2024
AKL
AC
ROH
Superior Room
Citylife Auckland
QO

Change Base Date

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

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

The full list is:

1. "Pickup / Dropoff" on page 79
2. "Voucher Text" on page 84
3. "Service Notes" on page 89
4. "Product Notes" on page 95
5. "Change Base Date" above (this task)
6. "Manage Days" on page 100
7. "Insert PCM" on page 104

This screen allows changes to be made to the PCM base date.

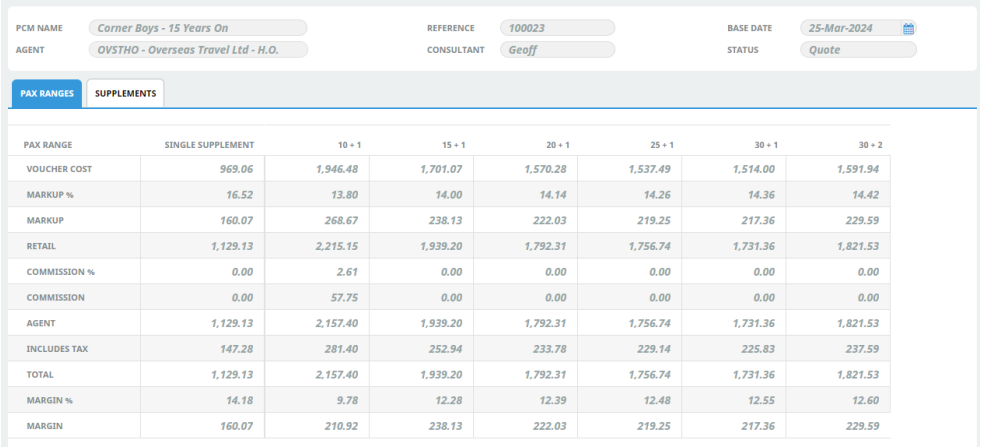
NOTE: Because PCMs are not an actual Booking, the date is not really the 'Travel Date'. It is the date on which the pricing is based, hence the use of the term 'Base Date'.

Change Base Date

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Switch to the **Itinerary View**.

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



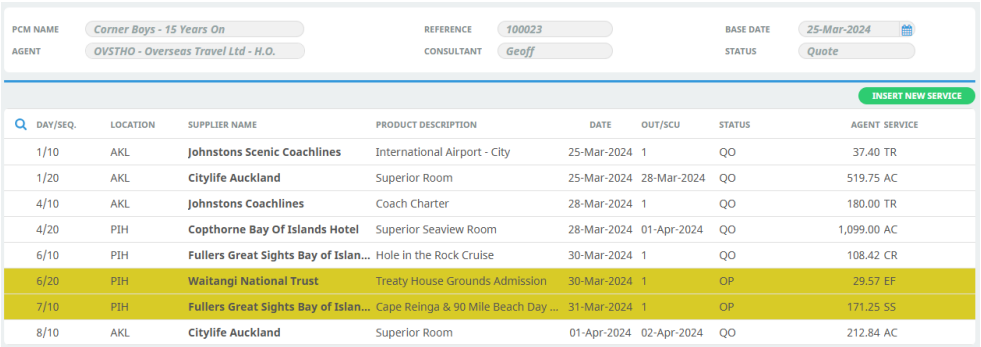
PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

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

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



PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT SERVICE
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40 TR
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75 AC
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00 TR
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00 AC
6/10	PIH	Fullers Great Sights Bay of Islan...	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42 CR
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57 EF
7/10	PIH	Fullers Great Sights Bay of Islan...	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25 SS
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84 AC

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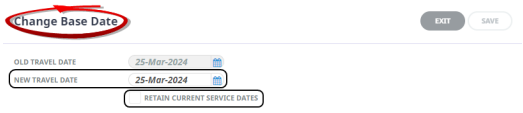
3. Select menu **PCM Quotes > Itinerary > Change Base Date**.

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



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

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

About Retain Current Service Dates

Unchecked

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

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

- *Replace All* – changes the PCM Header date and all service dates and re-costs all services for the revised travel dates.
- *All But Overrides* – as above however does not re-cost services where the original database rates were manually overridden. Manually overridden values need to be confirmed with the 'OK' button.
- *No Prices* – Recalculates the totals based on the existing service line values.
- *Update Exchange Rates* – When the 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 Currency Rates table for the new base date (checked).

Checked

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

In this case, no recalculation of the PCM is required.

Manage Days

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

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

The full list is:

1. "Pickup / Dropoff" on page 79
2. "Voucher Text" on page 84
3. "Service Notes" on page 89
4. "Product Notes" on page 95
5. "Change Base Date" on page 98
6. "Manage Days" above (this task)
7. "Insert PCM" on page 104

This screen enables days to be 'inserted' into a PCM (or removed from a PCM), thereby extending or contracting the duration of it.

For example, the agent/client may have advised that, due to a change in airline schedules, the departure date is 1 day later than originally planned. The PCM is revised to include one additional night in the current accommodation.

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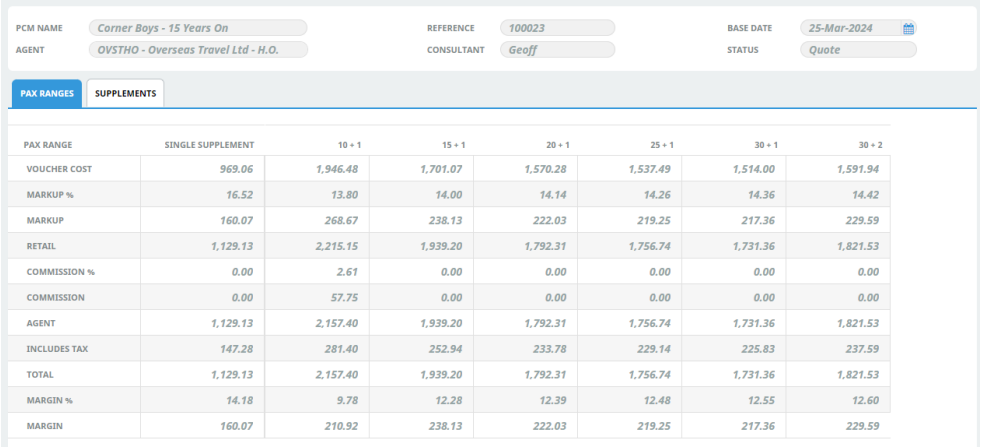
Insert or Delete Days

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Switch to the **Itinerary View**.

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



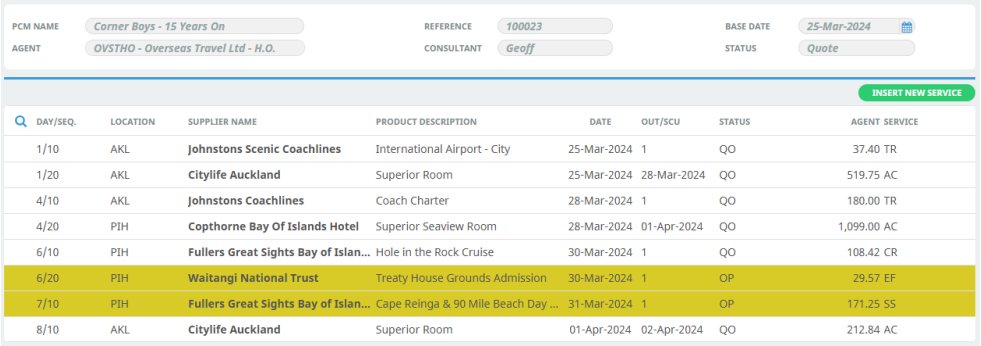
PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

PAX RANGES | SUPPLEMENTS

PAX RANGE	SINGLE SUPPLEMENT	10 + 1	15 + 1	20 + 1	25 + 1	30 + 1	30 + 2
VOUCHER COST	969.06	1,946.48	1,701.07	1,570.28	1,537.49	1,514.00	1,591.94
MARKUP %	16.52	13.80	14.00	14.14	14.26	14.36	14.42
MARKUP	160.07	268.67	238.13	222.03	219.25	217.36	229.59
RETAIL	1,129.13	2,215.15	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
COMMISSION %	0.00	2.61	0.00	0.00	0.00	0.00	0.00
COMMISSION	0.00	57.75	0.00	0.00	0.00	0.00	0.00
AGENT	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
INCLUDES TAX	147.28	281.40	252.94	233.78	229.14	225.83	237.59
TOTAL	1,129.13	2,157.40	1,939.20	1,792.31	1,756.74	1,731.36	1,821.53
MARGIN %	14.18	9.78	12.28	12.39	12.48	12.55	12.60
MARGIN	160.07	210.92	238.13	222.03	219.25	217.36	229.59

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

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



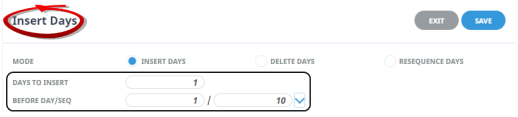
PCM NAME: Corner Boys - 15 Years On | REFERENCE: 100023 | BASE DATE: 25-Mar-2024
AGENT: OVSTHO - Overseas Travel Ltd - H.O. | CONSULTANT: Geoff | STATUS: Quote

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT SERVICE
1/10	AKL	Johnstons Scenic Coachlines	International Airport - City	25-Mar-2024	1	QO	37.40 TR
1/20	AKL	Citylife Auckland	Superior Room	25-Mar-2024	28-Mar-2024	QO	519.75 AC
4/10	AKL	Johnstons Coachlines	Coach Charter	28-Mar-2024	1	QO	180.00 TR
4/20	PIH	Copthorne Bay Of Islands Hotel	Superior Seaview Room	28-Mar-2024	01-Apr-2024	QO	1,099.00 AC
6/10	PIH	Fullers Great Sights Bay of Islan...	Hole in the Rock Cruise	30-Mar-2024	1	QO	108.42 CR
6/20	PIH	Waitangi National Trust	Treaty House Grounds Admission	30-Mar-2024	1	OP	29.57 EF
7/10	PIH	Fullers Great Sights Bay of Islan...	Cape Reinga & 90 Mile Beach Day ...	31-Mar-2024	1	OP	171.25 SS
8/10	AKL	Citylife Auckland	Superior Room	01-Apr-2024	02-Apr-2024	QO	212.84 AC

3. Select menu **PCM Quotes > Itinerary > Manage Days**.

4. On the **Insert Days** screen, choose a mode (i.e. *Insert Days* or *Delete Days*), enter the number of Days to Insert (or delete) and the new sequencing of those days, and then click **Save**.



Insert Days | EXIT | SAVE

MODE: INSERT DAYS | DELETE DAYS | RESEQUENCE DAYS
DAYS TO INSERT: 1
BEFORE DAY/SEQ: 1 / 10

   a. Or, select **Resequence Days**, enter a value for the system to start the sequence (of the first service), and to increment (subsequent services) by.

Resequence Days | EXIT | SAVE

MODE: INSERT DAYS | DELETE DAYS | RESEQUENCE DAYS
DAY TO RESEQUENCE: 1 - 25-Mar-2024
STARTING SEQUENCE: 10
INCREMENT BY: 10

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

If **Recalculate PCM** does pop-up, then Tourplan has determined that a recalculation is required. Generally, it's not possible to insert or delete days without a recalculation.

About the Insert/Delete/Resequence Days Fields

Mode

Select an option from either:

- Insert Days
- Delete Days
- Resequence Days

If Delete Days is chosen, the labels for the fields beneath it change to *Days to Delete* and *From Day/Seq*.

If Resequence Days is selected, then labels for the fields beneath it change to *Days to Resequence*, *Starting Sequence*, and *Increment By*.

Days to Insert/Delete

This field has a default value of 1 (one) when the screen is opened. Replace with the number of days to be inserted/deleted.

Before/From Day/Seq

Enter which day in the sequence to add before or delete from.

The Recalculate dialogue will display every time a service date/day number changes. This is because Tourplan needs to check whether the new date/day places the service in a different season/date range.

NOTE: The 'Insert Days' Utility will not adjust the number of nights for accommodation or rental vehicle services – these must be manually adjusted in the Costs screen.

Day to Re-sequence

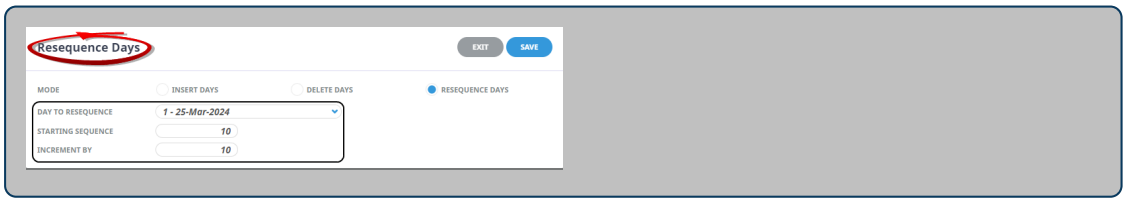
Drop down selection from booking day number and date. Select a day that you want the system to re-sequence services.

Starting Sequence

For the day selected enter a sequence number for the system to start the sequence from, the system will automatically default to 10.

Increment By

Enter a value for the system to increment the sequence for each service by, the system automatically defaults to 10. Setting a value here will give the service a new sequence number based on the order of services for this day.



Recalculate PCM

When making an amendment to booking dates and Save is clicked, Tourplan will prompt to re-cost the Booking. The choices are:

- *Replace All* – Changes the Booking Header date and all service dates and re-costs all services for the revised travel dates.
- *All Except Overrides* – As above however does not re-cost services where the original database rates were manually overridden. Manually overridden values need to be confirmed with the 'OK' button.
- *No Prices* – Recalculates the totals based on the existing service line values.

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- *Update Exchange Rates* – When the Booking services are re-costed should Tourplan continue to use the previous Exchange Rates (unchecked) or use the Exchange Rates from the Tourplan Code Setup module Currency Rates table for the new travel date (checked).

Insert PCM

This is the last of seven tasks described in this user manual for modifying a PCM itinerary.

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

The full list is:

1. "Pickup / Dropoff" on page 79
2. "Voucher Text" on page 84
3. "Service Notes" on page 89
4. "Product Notes" on page 95
5. "Change Base Date" on page 98
6. "Manage Days" on page 100
7. "Insert PCM" above (this task)

Insert PCM enables another PCM to be inserted inside the current one. This can be used in a number of ways:

- It can be used as an alternative method of copying a PCM, and
- It can be used to add all services from another PCM into the currently loaded one; i.e. to make one PCM out of several smaller PCMs.

Insert a PCM

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.
2. Select menu **PCM Quotes > Itinerary > Insert PCM**.
3. On the **Insert PCM** screen, enter details for the new PCM and click **Save**.

4. If the **Recalculate PCM** screen appears, select the relevant option and click **Yes**.
5. Click **Save** to keep the changes.
6. Click **Exit** to discard any changes.

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

About the Insert PCM Fields

PCM to Insert

Used for looking-up existing PCMs. Enter a few characters of the required PCM and click the *Search* icon to display a list of matching PCMs.

Selecting the *Search* icon with a blank PCM Name field will open the PCM Search screen to filter and find matched search results.

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Insert Type

The new PCM can be inserted into an existing PCM or merged with existing PCM services.

Selection	Description
INSERT	Renumbers the existing PCM service day and sequence numbers if necessary when inserting the new PCM. This means that if a 3-day PCM is inserted at say Day 2, Sequence 10, then Day 2 of the host PCM will become Day 5.
MERGE	Does not renumber the existing PCM services; instead, the inserted PCM services are renumbered to “fit around” the existing PCM services.

Insert at Day/Seq

The Day and Sequence Number at which the PCM will be inserted can be specified (or, if the PCM is to be inserted into a list of existing services, highlight a service in the list of existing services and the day/sequence number in these two fields will change to the day/sequence of the highlighted line).

NOTE: The insert will take place at the day/sequence specified. This means that if (e.g.) a PCM was to be inserted at 2/10, then the first service from the copied-in PCM would become Day 2/Sequence 10. On an Insert, this would push the service that was 2/10 down the list to be the first service after the newly inserted PCM Services. The following table attempts to explain the process:

Host PCM	Merge PCM	Result	Was
1 / 10		1 / 10	Host: 1 / 10
1 / 20		1 / 20	Host: 1 / 20
2 / 10	1 / 10	2 / 10	Host: 2 / 10
2 / 20	2 / 10	2 / 11	Merge: 1 / 10
3 / 10	3 / 10	2 / 20	Host: 2 / 20
3 / 20	3 / 20	3 / 10	Host: 3 / 10
4 / 10	4 / 10	3 / 11	Merge: 2 / 10
4 / 20	4 / 20	3 / 20	Host: 3 / 20
		4 / 10	Host: 4 / 10
		4 / 11	Merge: 3 / 10
		4 / 20	Host: 4 / 20
		4 / 21	Merge: 3 / 20
		5 / 10	Merge: 4 / 10
		5 / 20	Merge: 4 / 20

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CHAPTER 6

Working with PCM Operations

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

This chapter describes miscellaneous functions related to managing PCMs, including package setup, generating messages and maintaining contact details.

In this chapter ...

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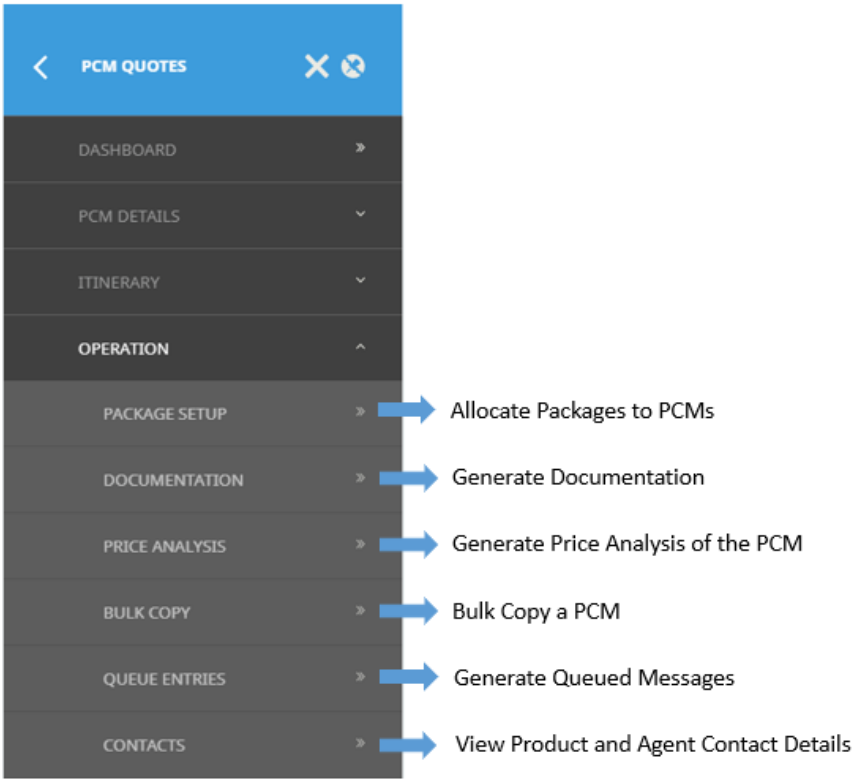
Package Setup 109
Documentation 110
Price Analysis 115
Copy Bulk PCMs from Analysis 118
Bulk Copy PCM Quote 121
Queue Entries 123
Contacts 126

TOURPLAN

Operation View

The Operation view picks up the remaining menu options related to modifying an existing PCM that are not already covered in one of the other PCM Quotes menus. As with changing general PCM details or itinerary information, there are several menu options, depending on the type of change needed.

The following graphic shows the PCM Quotes **Operation** menu matched with corresponding procedures in the PCM Quotes User Manual.



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Package Setup

This is the first of five tasks in this section of the user manual that describe 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" above (this task)
2. "Documentation" on the next page
3. "Price Analysis" on page 115
4. "Queue Entries" on page 123
5. "Contacts" on page 126

Package Setup has its own manual - the **PCM Packages User Manual**.

Refer to the PCM Packages User Manual for more information on Package Setup.

Documentation

This is the second of five tasks in this section of the user manual that describe 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" on the previous page
2. "Documentation" above (this task)
3. "Price Analysis" on page 115
4. "Queue Entries" on page 123
5. "Contacts" on page 126

The Documentation screen is where you generate, download and send documentation relating to the PCM.

NOTE: The setting up of message templates and the technical aspects of messaging are not discussed here. This section simply describes generating and outputting messages. The assumption is that message formats have been defined. The Messaging sub-system is covered in the System Setup User Manual.

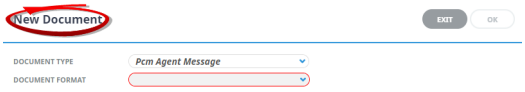
Generate Documentation

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Select menu **PCM Quotes > Operation > Documentation**.

3. To generate a new message, click **Generate Message**.

4. In the **New Document** screen select a Document Type and a Document Format. (If there are multiple itineraries, select the required itineraries for this message)

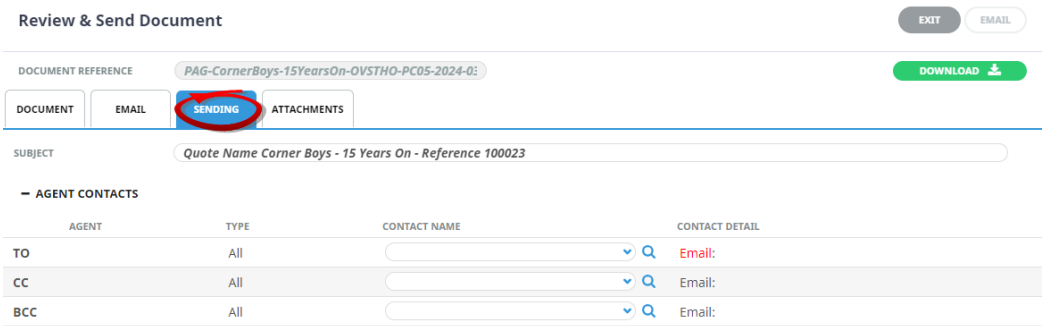
   

5. Click **OK** to keep the changes and save or update the entry.

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

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

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

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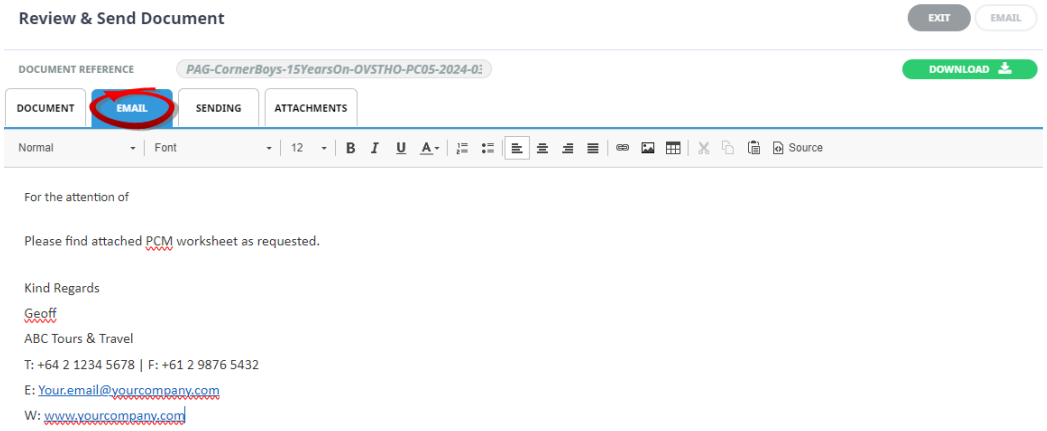
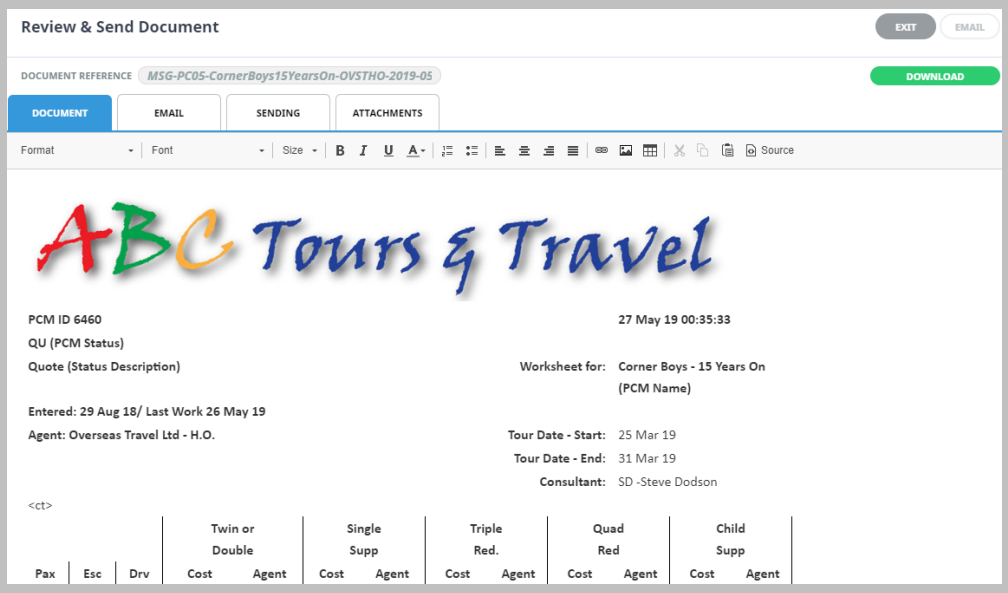
The email tab displays the body of the email coded within the Message Template. This can be viewed, and edited if required.



8. On the **Review & Send Document** screen, you can examine the generated document, download it (using the green **Download** button) or email (using the blue **Email** button).

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

This example shows the Review and Send **Document** screen for an Agent Message selection.



9. On the **Attachments** tab, click **Add** to add additional attachments to send with your email. - *Optional Task*. If the Message Template has been configured to send attachments, a list of attachments will show on screen.

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

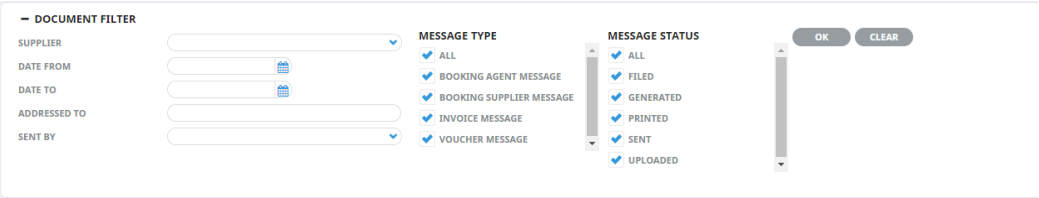
11. Click **Exit** to discard any changes.

View an Existing Message

1. Search for and retrieve a booking to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

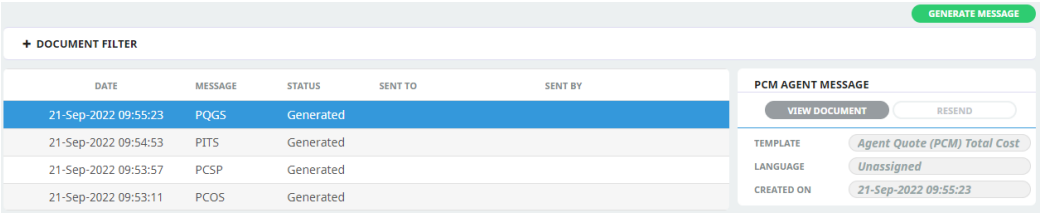
2. Select menu **PCM Quotes > Operation > Documentation**.

   NOTE: Filters can be used categorise the messages. Select the + next to the Document Filter heading to see the search filters available.



3. Examine the **list of documentation messages**, if any. The top (and most recently worked on) messages highlighted.

   The example messages were generated, however were not sent via an email. If an email was sent from Tourplan, the Sent To, and Sent By data would have recorded who the message was sent to and by whom.



4. To view an existing message, select it and click **View Document**.

   VIEW DOCUMENT

   a. If the document can be edited, an **Edit Document** button will display.

      EDIT DOCUMENT

5. On the **Review & Send Document** screen, you can examine the generated document, download it (using the green Download button) and email.

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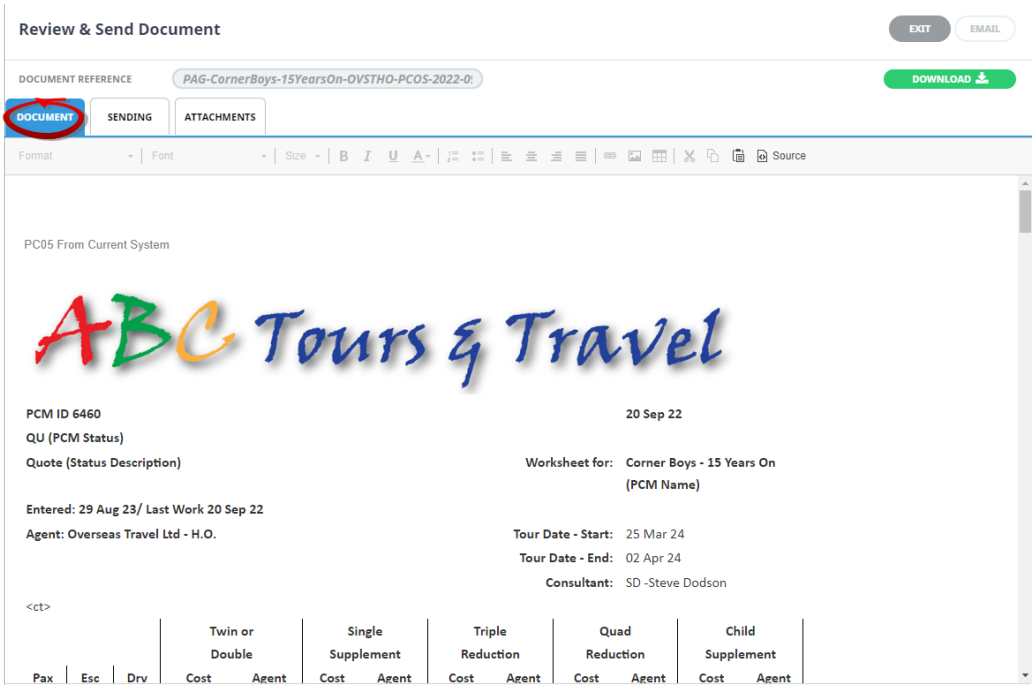

NOTE: You can scroll the document in the Document tab even if no scroll bars are visible.

6. Click *Download* to download the document into Microsoft Word.
7. To email a document:
   a. Click the *Sending* tab.
   b. Enter one or more email addresses (click the *Search* icon to enter email addresses).
   c. Add a Subject.
   d. Click *Email* to send the email or click *Exit* to return to the list of documentation messages.
8. As with View Document, from here you can examine the generated document, download it or email it.
9. As with generating a new document Attachments can be selected to send with the re-generated message.

Document Filter Fields

Supplier

Selection for a specific supplier code, or supplier name will narrow the search to return messages for this supplier only.

Date From / To

If you know the approximate date the message was sent or generated. Enter a from and to date range to filter messages generated during this time. Otherwise the from date will automatically default to 3 months before todays date.

Addressed To

The filtered results will return for the email address.

Sent By

The name of the Tourplan User who sent the message.

Message Type

Message Type selection allows results to return based on the message type checked.

Options available include: PCM Agent Messages, PCM Supplier Messages.

Message Status

Selection for all, individual or multiple message statuses allow the system to filter by; Filed, Generated, Printed, Sent and/or Uploaded Messages.

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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" on page 109
2. "Documentation" on page 110
3. "Price Analysis" above (this task)
4. "Queue Entries" on page 123
5. "Contacts" on page 126

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.

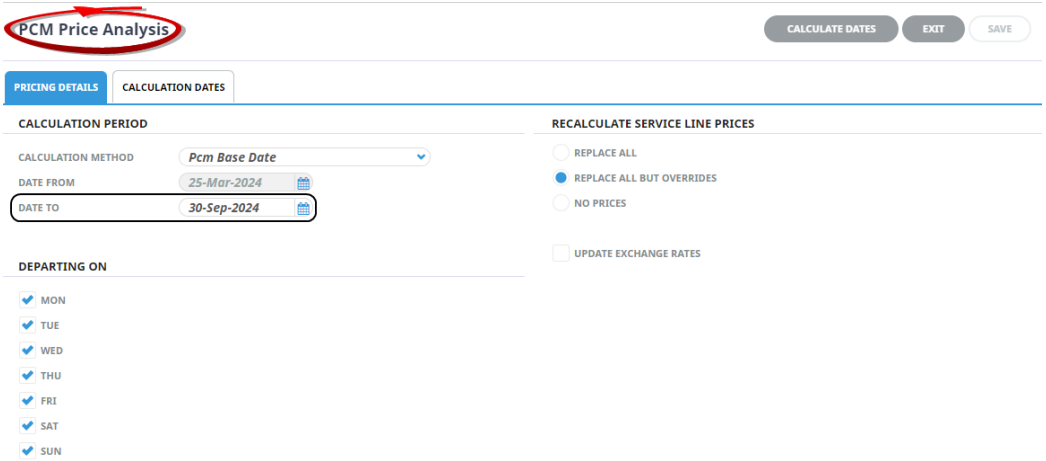
Performing a PCM Price Analysis

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

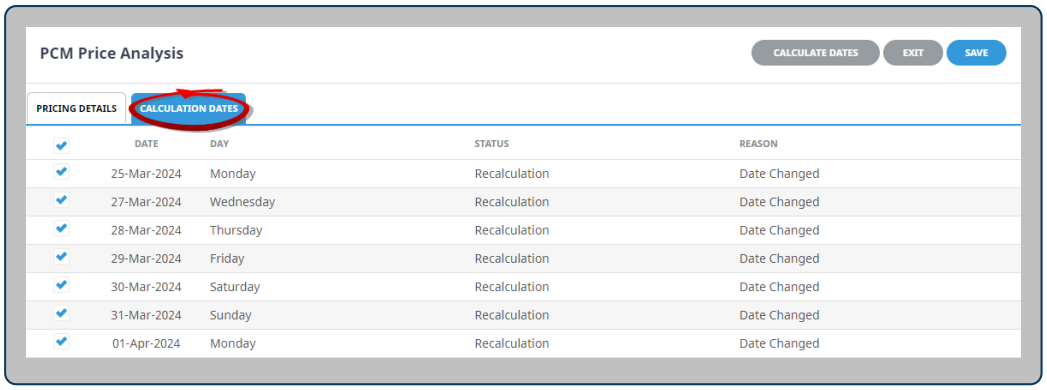
2. Select menu **PCM Quotes > Operation > Price Analysis**.

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

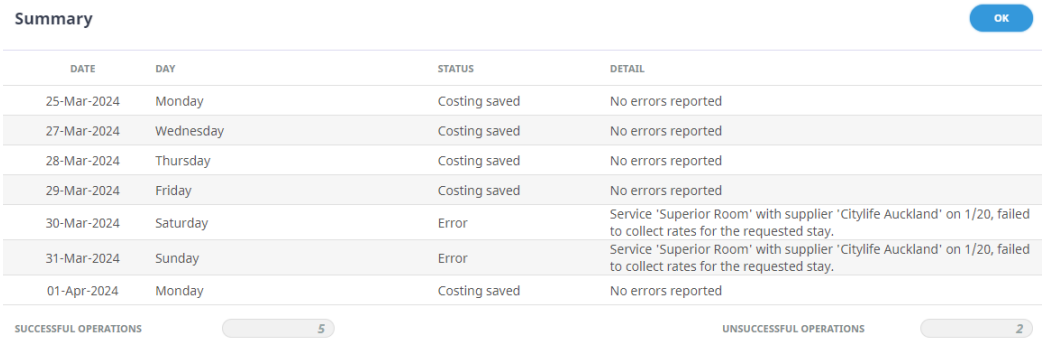


6. 'Select all' is the default setting, all identified recalculation changes will be selected. Users can select specific dates to re-calculate if required.

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.



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

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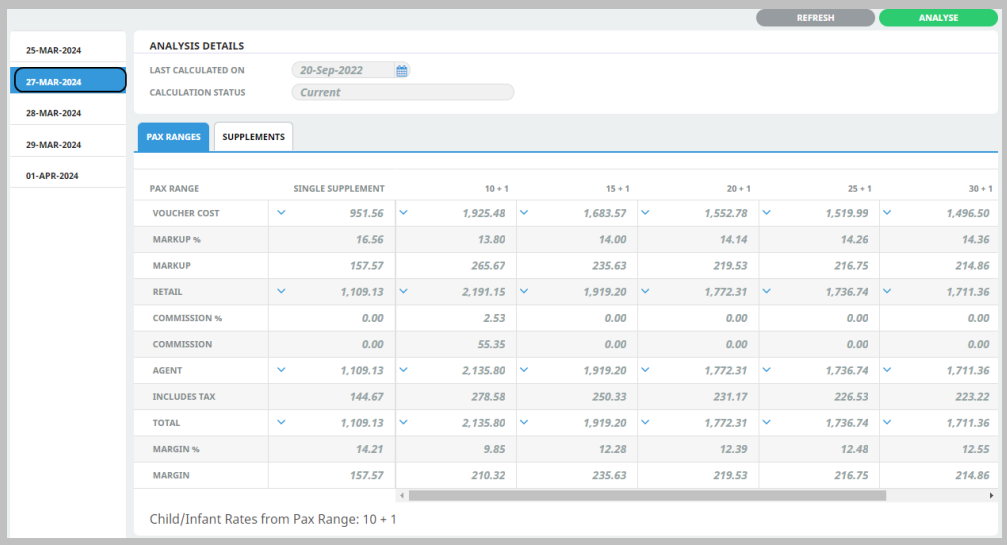
10. A list of date ranges will show to the left of the screen and values per pax range / supplement are available.

    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

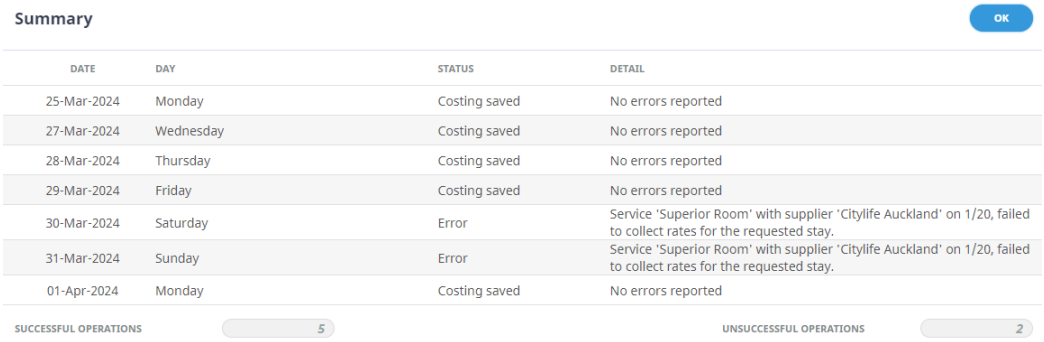
1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

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

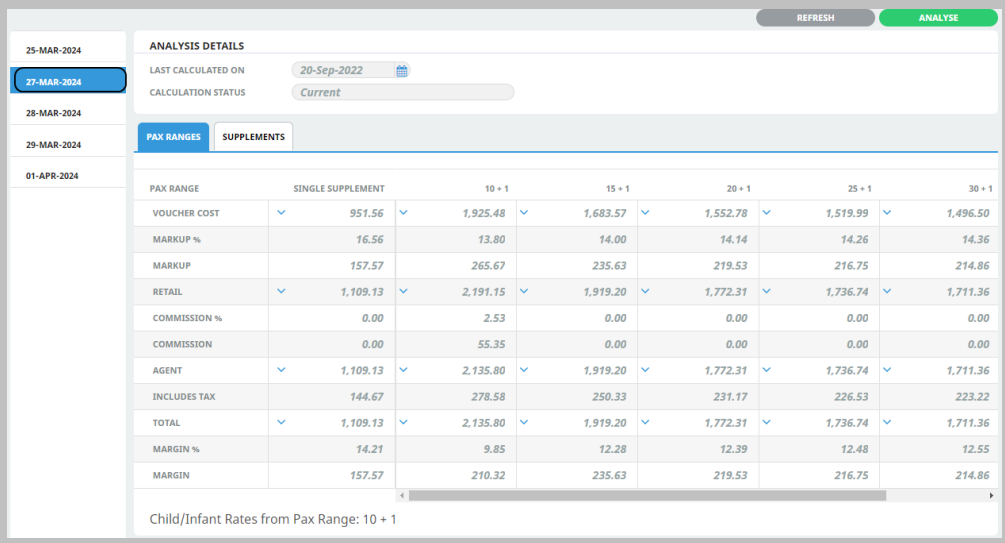
DATE	DAY	STATUS	DETAIL
25-Mar-2024	Monday	Costing saved	No errors reported
27-Mar-2024	Wednesday	Costing saved	No errors reported
28-Mar-2024	Thursday	Costing saved	No errors reported
29-Mar-2024	Friday	Costing saved	No errors reported
30-Mar-2024	Saturday	Error	Service 'Superior Room' with supplier '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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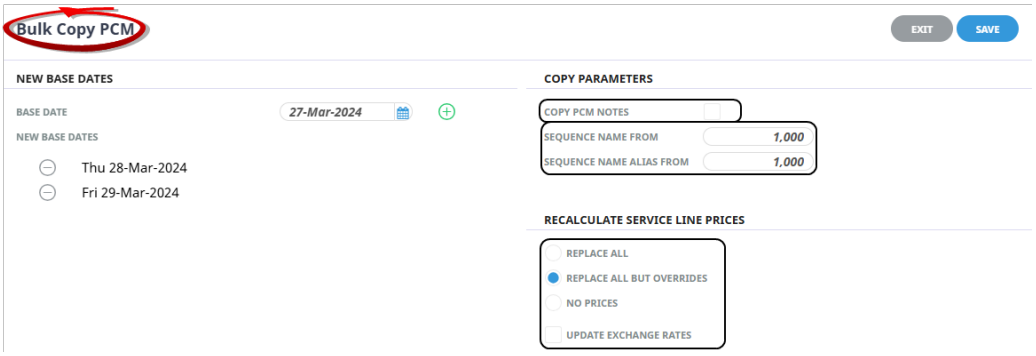
7. Click **Create PCMs**.

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" on page 50.

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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Bulk Copy PCM Quote

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

Locate and open the original PCM Quotes 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 Quotes. A sequence number will be added to the PCM Name and PCM Alias Name to help distinguish the PCM from the newly created copies.

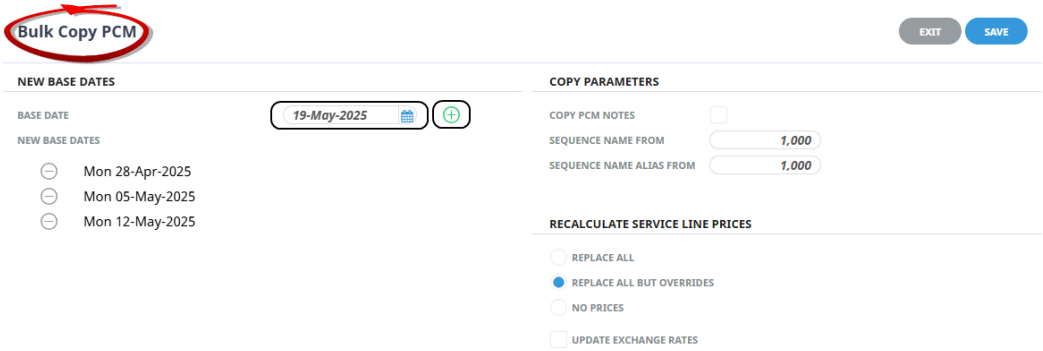
All details from the original PCM are copied, including the Agent and Branch/Department. You can choose whether to include the PCM Notes and decide how service line prices should be recalculated for the copied PCM s.

Copy PCM

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

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

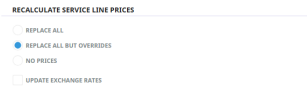
3. On the **Bulk Copy PCM** screen, add new **Base Date**s using the calendar selection, or manually entering a date, then select + to continue adding Base Dates.



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" on page 50.

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.

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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Queue Entries

This is the fourth of five tasks in this section of the user manual that describe 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. "Queue Entries" above
2. "Documentation" on page 110
3. "Price Analysis" on page 115
4. "Queue Entries" above (this task)
5. "Contacts" on page 126

The Queue Entries screen displays queue messages that have been sent and received for the PCM. Clicking an entry will open it.

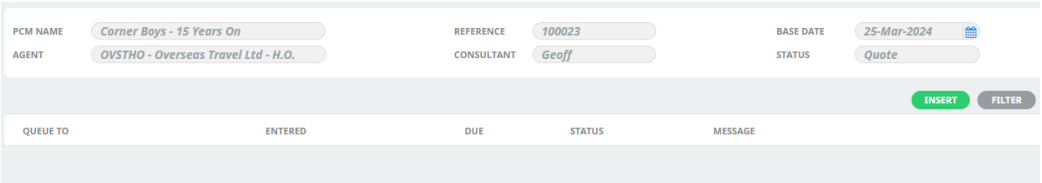
NOTE: The sending/receiving and handling of Message Queues are covered in the System Setup User Manual.

View and/or Insert Queue Messages

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

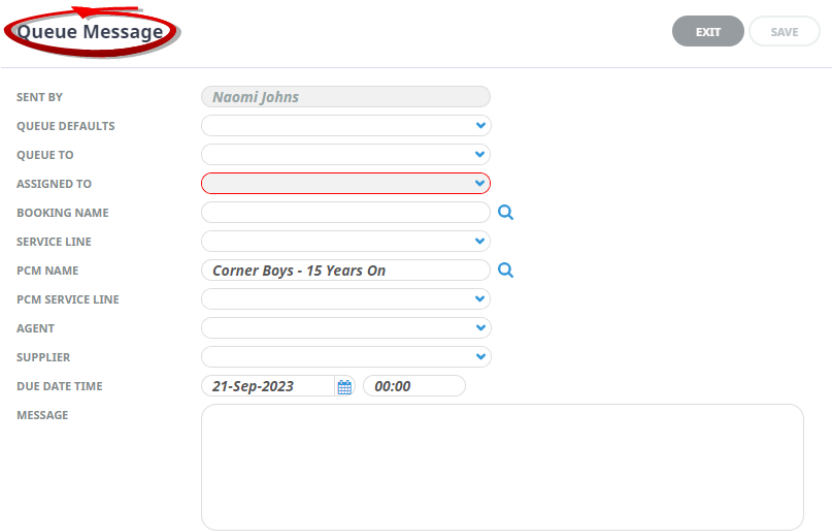
2. Select menu **PCM quotes > Operation > Queue Entries**.

3. On the **Queue Entries** screen, examine the list of queue messages, if any. This example shows no entries yet created.



4. To add a queue entry to the PCM, click **Insert**.

5. On the **Queue Message** screen, enter message details. Refer to "About the Queue Message Fields" on the next page for information on each of the fields on the Queue Message screen.



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

About the Queue Message Fields

Sent By

Queue entry sent by user name

Queue Defaults

A dropdown selection is available if Queue Defaults have been assigned in Code Setup.

Queue To

Queue name (if used).

Assigned To

User or Group queue is assigned to.

Booking Name

Booking name, if you have a booking that this message relates to selection can occur - otherwise leave the field blank

Service Line

A drop down service selection will allow users to select the specific service this message relates to.

PCM Name

Name of PCM if queue relates to a PCM. If you have the PCM open and have used the PCM Quotes menu selection to select Queue Entries the PCM Name will automatically display in this field.

PCM Service Line

A drop down list of service selection will allow users to select the specific PCM service this message relates to.

Agent

Booking agent code and name.

Supplier

Service supplier code and name.

Due Date Time

Queue due date and time.

Message

Free format text field to store message text.

Filtering Previously Sent Messages

Messages can be searched for using the grey filter button. A screen opens with specific search filter criteria to show messages that have been previously sent.

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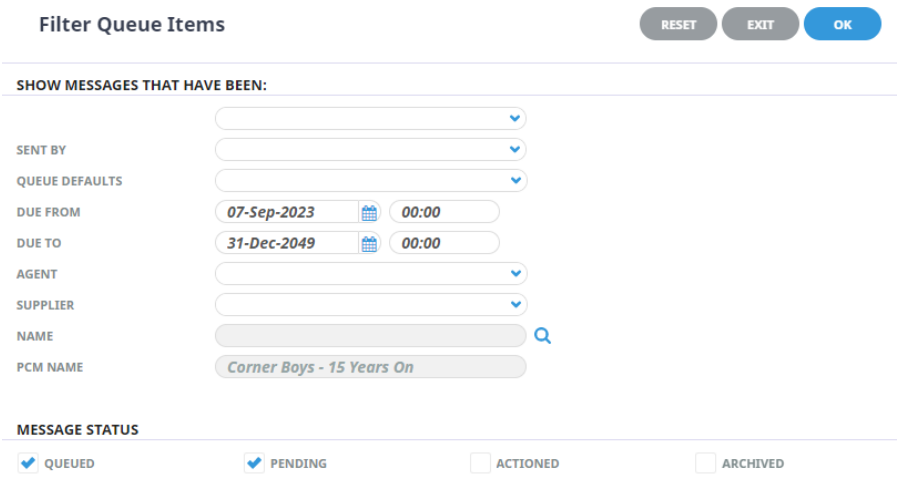


Filter Queue Items Fields

Sent To

A dropdown selection available to select who the queue message was sent to (either a User Name or a Group Queue Name).

Sent By

A dropdown selection available to select who the queue message was sent from (either a User Name or a Group Queue Name).

Queue Defaults

A dropdown selection available to select a pre-set Queue Default group.

Due From/To

Date and time selections to narrow the date time frame of when the queue was sent.

Agent

A dropdown selection available to select the Agent the queue message was sent to.

Supplier

A dropdown selection available to select the Supplier the queue message was sent to.

Name and PCM Name

The Booking Name/PCM Name fields are read only and populate from the booking/PCM open.

Message Status

Checkbox selection to filter and search for a Queue Message with a particular Message Status.

Contacts

This is the last of five tasks in this section of the user manual that describe 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" on page 109
2. "Documentation" on page 110
3. "Queue Entries" on page 123
4. "Price Analysis" on page 115
5. "Contacts" above (this task)

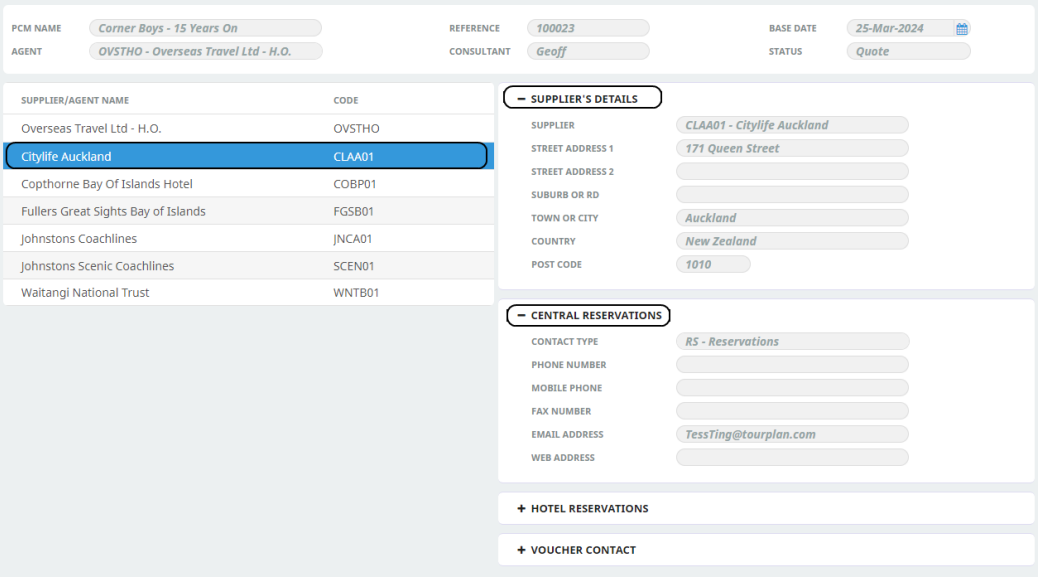
The Contacts screen displays all contacts for a PCM.

View PCM Contact Details

1. Search for and retrieve a PCM to work with. If you haven't done this already, see "Retrieve an Existing PCM" on page 50.

2. Select menu **PCM Quotes > Operation > Contacts**.

3. On the **contact details** screen (left-hand side), select a service line under **Supplier/Agent Name** and expand the relevant section on the right-hand side.



In the example above, the service line selected is **Citylife Auckland** and contact details for two sections on the right-hand side are expanded: *Supplier's Details* and *Hotel Reservations*.

NOTE: Click the **-** (minus) icon in the section header to collapse and the **+** (plus) icon to expand.

> Contact details cannot be changed in this screen. Contact details are added and edited in the **Debtors** (Agents), **Creditors** (Suppliers) and **Code Setup** applications.

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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 128

TOURPLAN

Appendix 1 - Scroll Column Headings

Change Default Column Headings

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

PCM Quotes (PCM Packages) 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 Booking markup).
* (Retail) Comm	The value of any agent commission (commission being paid to the debtor/agent attached to the Booking), which is deducted from the retail price.
* (Retail) Comm %	An on-screen calculation (i.e. not stored in the system) of the Commission value expressed as a percentage of the Retail total.
* Agent	The sum of Retail less Commission = the price the agent/debtor will pay.
Margin	The value added to the cost after Agent Commission has been applied.
Margin %	An on-screen calculation of the Margin value expressed as a percentage.
Supplier Name	The service supplier full name.
Local Supplier Name	If local fields are used, the service supplier local name.
Service	The service code.
(Product) Code	The service (i.e. product) code.
Product Comment	Service product comment.
* Product Description	Service (i.e. product) full description.

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PCM Quotes (PCM Packages) 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 or *Product > Product Packages > 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 128.

Bookings and Quotes > *PCM Quotes* > *Itinerary* > Insert Service *or Product* > *Product Packages* > *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 128.

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 128.

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