

Operations User Manual

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CHAPTER 1

Getting Started with Operations

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

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

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

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

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

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

About the User Manuals

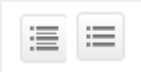
The user manuals for Tourplan NX are a set of manuals, available both online and in print, that assist users to use the system.

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	<i>Italics</i> 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	<u>Enter rate details</u>	Heading label for procedures, which are specific tasks or sets of steps to be carried out.
Breadcrumb Trail	Menu > Sub-menu > Selection	Indicates a menu selection path to follow, to arrive at a particular screen. For example, Home > Bookings and Quotes > FITs .

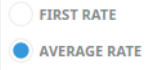
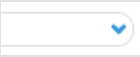
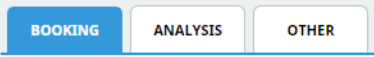
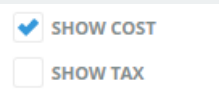
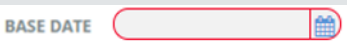
Getting Started With Tourplan NX

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

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

Tourplan NX Application Conventions

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

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

About the Landing Page

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

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

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

Landing Page Sections

The screenshot displays the Tourplan-NX Landing Page. On the left is a dark sidebar menu with options like PCMs, QUOTES, GROUPS, and BOOKINGS AND QUOTES. The top header shows 'Home', the user 'PA-NAOMIJOHNS', and a 'logged in as' status. The main body is divided into four sections: 'Recently Worked On' (with a table of bookings), 'Travelling Soon' (with a table of upcoming bookings), 'My Messages' (with a table of messages), and 'Useful Links' (with a link to 'myTourplan'). A large watermark 'Body (4 Sections)' is overlaid on the right side of the dashboard.

About the Landing Page Sections

Recently Worked On

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

Travelling Soon

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

My Messages

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

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

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

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

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

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

Respond to a Message in My Messages

Messages can be responded to and the message status updated.

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

Queue Message [EXIT] [SAVE]

SENT BY: PA-GEOFFBEAVER

QUEUE DEFAULTS: [Field]

QUEUE TO: [Field]

ASSIGNED TO: Naomi Johns

BOOKING NAME: Halstead Mr & Mrs/Armstrong Mr & Mr

SERVICE LINE: [Field]

PCM NAME: [Field]

PCM SERVICE LINE: [Field]

AGENT: [Field]

SUPPLIER: [Field]

DUE DATE TIME: 23-Jan-2025 15:00

MESSAGE: Another test queue message - this time from a booking!

MESSAGE STATUS

☐ QUEUED ☒ PENDING ☐ ACTIONED ☐ ARCHIVED

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**.

followed by

Send

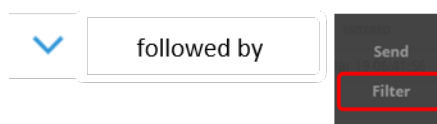
Filter

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.

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



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

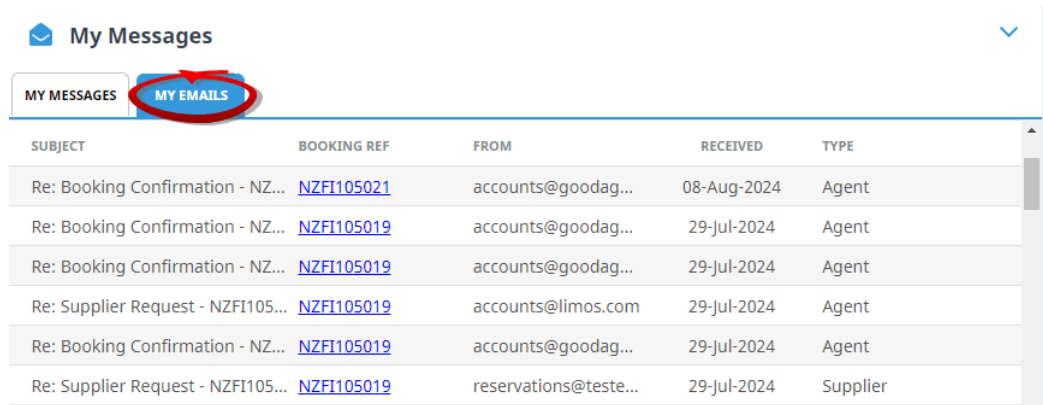


- On the **Filter Queue Items** screen, enter filter criteria and click **OK**.

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

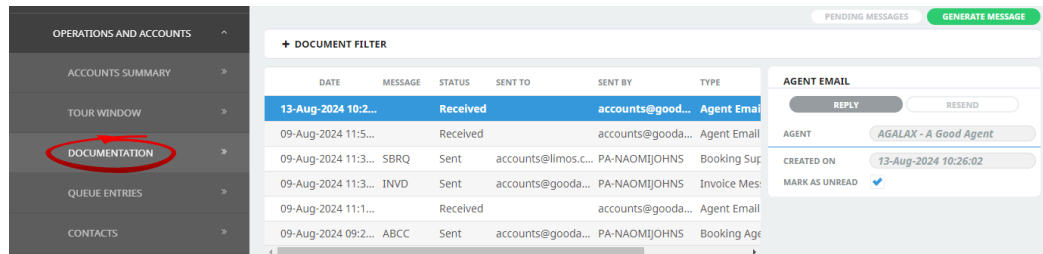
View Received Emails & Open Booking

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



SUBJECT	BOOKING REF	FROM	RECEIVED	TYPE
Re: Booking Confirmation - NZ...	NZFI105021	accounts@goodag...	08-Aug-2024	Agent
Re: Booking Confirmation - NZ...	NZFI105019	accounts@goodag...	29-Jul-2024	Agent
Re: Booking Confirmation - NZ...	NZFI105019	accounts@goodag...	29-Jul-2024	Agent
Re: Supplier Request - NZFI105...	NZFI105019	accounts@limos.com	29-Jul-2024	Agent
Re: Booking Confirmation - NZ...	NZFI105019	accounts@goodag...	29-Jul-2024	Agent
Re: Supplier Request - NZFI105...	NZFI105019	reservations@teste...	29-Jul-2024	Supplier

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.



DATE	MESSAGE	STATUS	SENT TO	SENT BY	TYPE
13-Aug-2024 10:2...		Received	accounts@gooda...	Agent Email	
09-Aug-2024 11:5...		Received	accounts@gooda...	Agent Email	
09-Aug-2024 11:3...	SBRQ	Sent	accounts@limos.c...	PA-NAOMIJOHNS	Booking Sup
09-Aug-2024 11:3...	INVD	Sent	accounts@gooda...	PA-NAOMIJOHNS	Invoice Mes
09-Aug-2024 11:1...		Received	accounts@gooda...	Agent Email	
09-Aug-2024 09:2...	ABCC	Sent	accounts@gooda...	PA-NAOMIJOHNS	Booking Age

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.

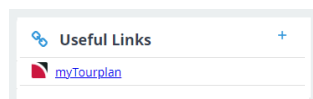


The URLs on a user's desktop may differ from those of another user.

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.

Useful Links

[DELETE](#)[EXIT](#)[SAVE](#)

NAME

URL

SEQUENCE

About the Tourplan-NX Menu

The Hamburger Menu

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



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

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

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

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

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

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

Menu Changes with Selections

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

Menu Breadcrumb Trails

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

About Quick Links

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

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CHAPTER 2

Bulk Documentation

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

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

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

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

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Bulk Messaging Solutions

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

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

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

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

Supplier Messaging

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

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

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

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

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

Bulk Supplier Messaging - Accommodation NB Service Status for KK Booking Statu							
COPY FILTER SAVE FILTER DELETE EXIT SEND							
BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS			
SELECTED		0		FOUND	92		SELECT ALL UNSELECT ALL
	DATE	VOUCHER SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS	BKG STATUS
☐	10-Apr-2024	100,461 HERA01	ROH	Superior Room	NZSE104528	NB	KK
☐	10-Apr-2024	100,444 HERA01	ROH	Superior Room	NZSE104527	NB	KK
☐	11-Apr-2024	100,463 MILR01	ROH	Superior Room	NZSE104528	NB	KK
☐	11-Apr-2024	100,447 MILR01	ROH	Superior Room	NZSE104527	NB	KK
☐	13-Apr-2024	100,469 QHEC01	ROH	Standard Room	NZSE104528	NB	KK
☐	13-Apr-2024	100,453 QHEC01	ROH	Standard Room	NZSE104527	NB	KK
☐	15-Apr-2024	100,471 KGHG01	ROH	Run of House Room	NZSE104528	NB	KK
☐	15-Apr-2024	102,562 HERA01	ROH	Superior Room	NZSE104539	NB	KK

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

Bulk Supplier Messaging
EXIT
OK

DOCUMENT FORMAT
SBRQ - Supplier Request

CONSOLIDATE BY
NONE
SUPPLIER
MASTER SUPPLIER
BOOKING
SINGLE DOCUMENT

ORDER BY
SERVICE DATE
PICKUP DATE/TIME
SUPPLIER CODE

SERVICE STATUS
UPDATE STATUS

DOCUMENT DESTINATION
Email

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

Create Manual Supplier Messaging Filters and Send Messages

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

MANUAL

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

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

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

4. Check the **completed screens**.

Booking Tab

Bulk Supplier Messaging - Manual Selection

COPY FILTER
SAVE FILTER
DELETE
EXIT
SEND

BOOKING
ANALYSIS
SERVICE
ANALYSIS
RESULTS

LAST WORKED DATE FROM
LAST WORKED DATE TO
TRAVEL DATE FROM
TRAVEL DATE TO
AGENT FROM
AGENT TO
MASTER AGENT FROM
MASTER AGENT TO

DATE ENTERED FROM
DATE ENTERED TO
CONSULTANT
BOOKING TYPES
REFERENCE

BOOKING STATUS
ALL
CANCELLED
CANCELLED WITH COST
CONFIRMED
DEPOSIT INVOICE
FINALISED
INVOICED
QUOTATION

BRANCH
ALL
ADMINISTRATION
AUSTRALIAN OFFICE
BALANCE SHEET
NZ OFFICE
ONLINE SALES
UNASSIGNED
USA OFFICE

DEPARTMENT
ALL
ADMINISTRATION
COASTAL EXCURSIONS
FIT
GROUPS
INCENTIVES
INTERNET FIT
SERIES TOURS
SHORE EXCURSIONS
SPECIAL GROUPS
UNASSIGNED

Analysis Tab (Booking and Agent Analysis)

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

Bulk Supplier Messaging - Manual Selection

COPY FILTER
SAVE FILTER
DELETE
EXIT
SEND

BOOKING
ANALYSIS
SERVICE
ANALYSIS
RESULTS

BOOKING TYPE

- ALL
- CONFERENCE
- FAM TRIP
- INCENTIVE
- PACKAGE
- SERIES
- SPECIAL INTEREST
- TAILOR MADE/BESPOKE

PAX NATIONALITY

- ALL
- ARGENTINA
- AUSTRALIA
- CANADA
- CHINA
- COSTA RICA
- CZECHIA
- FRANCE

SOURCE

- ALL
- ADVERTISEMENT
- BROCHURE
- DIRECT
- INTERNET
- TRAVEL AGENT
- TRAVELLED BEFORE
- UNASSIGNED

MARKUP M/A

- ALL
- MANUAL
- UNASSIGNED

DOC'S STATUS

- ALL
- FINALISED
- IN PRODUCTION
- REQUESTED
- UNASSIGNED

REASON REFUSED

- ALL
- BOOKED ELSEWHERE
- ILLNESS
- PRICE
- SERVICE
- UNABLE TO TRAVEL
- UNASSIGNED

+ AGENT TYPE
+ CONSORTIUM

REGION
RATE GROUP

PAYMENT TERMS
SALES REP

Service Tab

Bulk Supplier Messaging - Manual Selection

COPY FILTER
SAVE FILTER
DELETE
EXIT
SEND

BOOKING
ANALYSIS
SERVICE
ANALYSIS
RESULTS

SERVICE DATE FROM
SERVICE DATE TO
SUPPLIER FROM
SUPPLIER TO
MASTER SUPPLIER FROM
MASTER SUPPLIER TO

LOCATION

SERVICE STATUS

- ALL
- AMENDED FROM KK
- AMENDED FROM RQ
- AMENDED FROM WL
- CANCELLED
- CANCELLED - CHARGE
- CONF FROM ALLOCATION
- CONFIRMED
- CONFIRMED FREESALE
- INITIAL STATUS
- ITINERARY ONLY
- NOT BOOKED
- ON REQUEST
- OPTIONAL SERVICE
- PACKAGE SERVICE
- PARTIAL ALLOCATION

SERVICE

- ALL
- ACCOMMODATION
- ACTIVITY
- CANCELLATION FEE
- CRUISE
- ENTRANCE FEE
- FLIGHT
- GUIDE
- ITINERARY TEXT
- MEAL
- PACKAGE
- RENTAL VEHICLE
- SIGHTSEEING/DAY TOUR
- SUNDRY
- SURCHARGE FEE
- TRANSFER

Analysis Tab (Supplier and Service Analysis)

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

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Bulk Supplier Messaging - Manual Selection COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

SUPPLIER TYPE

- ☒ ALL
- ☒ ACCOMMODATION
- ☒ SIGHTS/MEALS/ACTIVITY/ENTRY
- ☒ TRANSPORT
- ☒ UNASSIGNED

REGION

- ☒ ALL
- ☒ AUCKLAND
- ☒ BANKS PENINSULA
- ☒ BAY OF PLENTY
- ☒ CANTERBURY
- ☒ CENTRAL OTAGO
- ☒ COROMANDEL
- ☒ EAST COAST NORTH ISLAND

ELECTRONIC PAY FLAG

- ☒ ALL
- ☒ ELECTRONIC FUNDS TRANSFER
- ☒ UNASSIGNED

SUPPLIER CHAIN

- ☒ ALL
- ☒ ACCOR HOTELS
- ☒ AMORA HOTELS
- ☒ BELLA VISTA MOTEL GROUP
- ☒ BOUTIQUE HOTELS
- ☒ CHOICE HOTELS
- ☒ DISTINCTION HOTELS
- ☒ HERITAGE HOTELS

BRAND WITHIN CHAIN

- ☒ ALL
- ☒ CITY LIFE
- ☒ COPTHORNE
- ☒ CROWNE PLAZA
- ☒ GRAND MERCURE
- ☒ HERITAGE
- ☒ HOLIDAY INN
- ☒ IBIS

INTERNAL RATING

- ☒ ALL
- ☒ 1.5 STAR
- ☒ 1STAR
- ☒ 2 STAR
- ☒ 2.5 STAR
- ☒ 3 STAR
- ☒ 3.5 STAR
- ☒ 4 STAR

SERVICE CATEGORY ☒ **PASS TYPE** ☒ **ANALYSIS 3** ☒

ANALYSIS 4 ☒ **ANALYSIS 5** ☒ **ANALYSIS 6** ☒

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

Bulk Supplier Messaging - Manual Selection COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

SELECTED **2** FOUND **31** SELECT ALL UNSELECT ALL

	DATE	VOUCHER	SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS
☐	13-Jan-2026	103,366	OOONZL	DOCS	Documentation Fee	NZFI104640	NB
☒	13-Jan-2026	103,365	HMLA01	CITAPT	City Hotels to Airport & Airport Hotels	NZFI104640	NB
☒	12-Jan-2026	103,367	SKGA01	ROHBUY	City View Luxury Room (ROH)	NZFI104640	NB
☐	11-Jan-2026	103,363	POSR01	VISIT	Adult Pools & Priest Spa	NZFI104640	NB
☐	11-Jan-2026	103,362	AGPR01	VISIT	Sheep Show	NZFI104640	NB
☐	10-Jan-2026	103,361	MILR01	ROH	Superior Room	NZFI104640	NB
☐	10-Jan-2026	103,360	HMSM01	FITTOU	Movie Set & Farm Tour	NZFI104640	NB
☐	08-Jan-2026	103,359	GRSA01	GS1K	Auckland Morning City Sights + Kelly Tarl...	NZFI104640	NB
☐	07-Jan-2026	103,358	BUDN01	EDMR	Group A - Sub Compact Manual	NZFI104640	NB
☐	07-Jan-2026	103,357	SKGA01	ROHCTY	City View Luxury Room (ROH)	NZFI104640	NB
☐	07-Jan-2026	103,356	HMLA01	INTHOT	International Airport to City Hotel (Privat...	NZFI104640	NB
☐	04-Jan-2026	102,747	RYLC01	RM05	Superior Room	NZGP104549	NB
☐	03-Jan-2026	102,746	HGHO01	ROH	Standard Room (Group)	NZGP104549	NB
☐	03-Jan-2026	102,745	TGRD01	DUMIOW	Dunedin - Middlemarch (One-way)	NZGP104549	NB

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

SEND

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

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

Bulk Supplier Messaging EXIT OK

DOCUMENT FORMAT: **SBRQ - Supplier Request**

CONSOLIDATE BY: ☐ NONE ☒ SUPPLIER ☐ MASTER SUPPLIER ☐ BOOKING ☐ SINGLE DOCUMENT

ORDER BY: ☒ SERVICE DATE ☐ PICKUP DATE/TIME ☐ SUPPLIER CODE

SERVICE STATUS: ☐ UPDATE STATUS

DOCUMENT DESTINATION: **Email**

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

Bulk Supplier Messaging EXIT OK

DOCUMENT FORMAT: **SBRQ - Supplier Request**

CONSOLIDATE BY: ☐ NONE ☒ SUPPLIER ☐ MASTER SUPPLIER ☐ BOOKING ☐ SINGLE DOCUMENT

ORDER BY: ☒ SERVICE DATE ☐ PICKUP DATE/TIME ☐ SUPPLIER CODE

SERVICE STATUS: ☒ UPDATE STATUS

DOCUMENT DESTINATION: **Email**

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

- Click **OK** to keep the changes and save or update the entry.
- Click **Exit** to discard any changes.
- If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.

Review & Send Document EXIT DOWNLOAD ALL EMAIL EMAIL ALL

CITY HOTELS TO AIRPORT & AIRPORT HOT
CITY VIEW LUXURY ROOM (ROH)

DOCUMENT REFERENCE: **BSP-NZFI104640-SKGA01-103367-SBRQ-2022-10-12** DOWNLOAD

DOCUMENT **SENDING** **ATTACHMENTS**

SUBJECT

SUPPLIER CONTACTS

SUPPLIER	TYPE	CONTACT NAME	CONTACT DETAIL
TO	All	Reservations	Email: naomi.johns@pa.tourp...

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

EXIT DOWNLOAD ALL EMAIL EMAIL ALL

DOCUMENT REFERENCE: **BSP-NZFI104640-SKGA01-103367-SBRQ-2022-10-12** DOWNLOAD

DOCUMENT **SENDING** **ATTACHMENTS**

SUBJECT

SUPPLIER CONTACTS

SUPPLIER	TYPE	CONTACT NAME	CONTACT DETAIL
TO	All	Reservations	Email: naomi.johns@pa.tourp...

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.

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

EXIT DOWNLOAD ALL EMAIL EMAIL ALL

DOCUMENT REFERENCE BSP-NZFI104640-SKGA01-103367-SBRQ-2022-10-12

DOCUMENT SENDING ATTACHMENTS

Format Font Size

B I U A- Source

ABC Tours & Travel

NEW BOOKING REQUEST

To: Skycity Grand Hotel

From: ABC Tours – Reservations

Date: 12 Oct 22

Please reserve the following arrangements for our client(s) at our agreed contract rates:

Booking Name: Halstead Mr & Mrs/Armstrong Mr & Mrs

Our Reference: NZFI104640

Room Basis: City View Luxury Room (ROH)

Pax: 4 adults, 1 child(ren), 0 infant(s)

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



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

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

EXIT DOWNLOAD ALL EMAIL EMAIL ALL

DOCUMENT REFERENCE BSP-NZFI104640-SKGA01-103367-SBRQ-2022-10-12

DOCUMENT SENDING ATTACHMENTS

ATTACHMENTS ADD

NAME	SIZE	DELETE
------	------	--------

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

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

EMAIL

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

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

About Bulk Supplier Messaging Filters

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

There are 4 Tabs that include field filter selections:

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

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

Booking Tab

Last Worked Date From/To

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

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

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

Date Entered From/To

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

Consultant

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

Booking Types

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

Booking Type selection includes:

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

Reference

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

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

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

Service Tab**Service Date From/To**

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

Supplier From/To

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

Master Supplier From/To

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

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

Location

Used to select services in a specific location.

Service Status

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

Service

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

Analysis Tab (Supplier and Product Analysis)**Supplier Analysis**

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

Product Analysis

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

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

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

Results Tab**Selected**

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

Found

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

Select All/Unselect All

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Supplier Messaging, see ["Bulk Documentation" on page 231](#).

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

Selected check boxes

Services can be individually selected.

Save Filters for Supplier Messages

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

Save Filters for Supplier Messages

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

2. Click **Manual**.



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

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

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

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



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



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



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

NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the description will display each time a user opens Bulk Supplier Messaging. If selected for future Bulk Supplier Message sending, results will be returned based on the saved filters.

10. If **Add** is selected the results screen will re-display, where you can select to **Send** messages (following from [Step 5](#) in the previous procedure), or **Exit**.

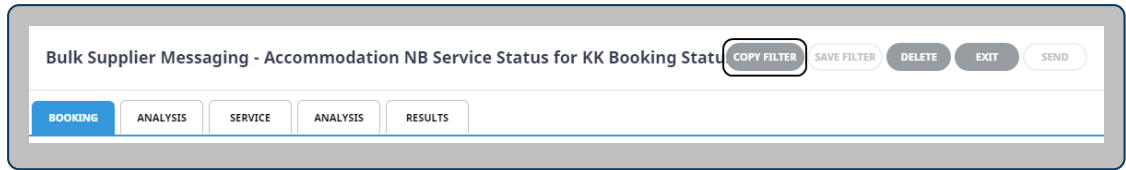


The procedures just described are sufficient to create manual filter criteria to send bulk supplier messages from PCMs, and to save filters for future use. There are many unique filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields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

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

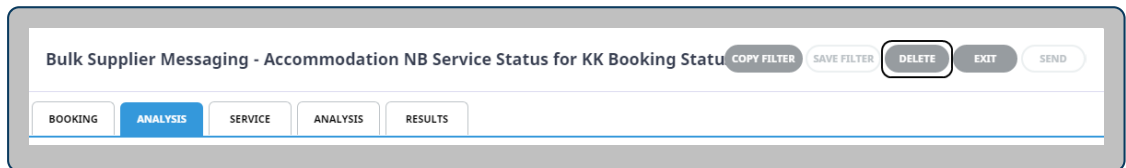
Copy Supplier Messaging Filters

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



Deletion of Supplier Messaging Filter Descriptions

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



Agent Messaging

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

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

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

Create Manual Agent Messaging Filters and Send Messages

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

2. Click **Manual**.



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

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

Booking Tab

Bulk Agent Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS SERVICE RESULTS

TRAVEL DATE FROM [] DATE ENTERED FROM []

TRAVEL DATE TO [] DATE ENTERED TO []

AGENT FROM [] CONSULTANT []

AGENT TO [] BOOKING TYPES [All booking types]

MASTER AGENT FROM [] REFERENCE []

MASTER AGENT TO []

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

Analysis Tab

Bulk Agent Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING **ANALYSIS** SERVICE RESULTS

BOOKING TYPE	PAX NATIONALITY	SOURCE
☒ ALL	☒ ALL	☒ ALL
☒ CONFERENCE	☒ ARGENTINA	☒ ADVERTISEMENT
☒ FAM TRIP	☒ AUSTRALIA	☒ BROCHURE
☒ INCENTIVE	☒ CANADA	☒ DIRECT
☒ PACKAGE	☒ CHINA	☒ INTERNET
☒ SERIES	☒ COSTA RICA	☒ TRAVEL AGENT
☒ SPECIAL INTEREST	☒ CZECHIA	☒ TRAVELLED BEFORE
☒ TAILOR MADE/BESPOKE	☒ FRANCE	☒ UNASSIGNED

MARKUP M/A	DOC'S STATUS	REASON REFUSED
☒ ALL	☒ ALL	☒ ALL
☒ MANUAL	☒ FINALISED	☒ BOOKED ELSEWHERE
☒ UNASSIGNED	☒ IN PRODUCTION	☒ ILLNESS
	☒ REQUESTED	☒ PRICE
	☒ UNASSIGNED	☒ SERVICE
		☒ UNABLE TO TRAVEL
		☒ UNASSIGNED

+ AGENT TYPE REGION PAYMENT TERMS

+ CONSORTIUM RATE GROUP SALES REP

Services Tab

Bulk Agent Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS **SERVICE** RESULTS

SERVICE DATE FROM

SERVICE DATE TO

SUPPLIER FROM

SUPPLIER TO

SERVICE

- ☒ ALL
- ☒ ACCOMMODATION
- ☒ ACTIVITY
- ☒ CANCELLATION FEE
- ☒ CRUISE
- ☒ ENTRANCE FEE
- ☒ FLIGHT
- ☒ GUIDE
- ☒ ITINERARY TEXT
- ☒ MEAL
- ☒ PACKAGE
- ☒ RENTAL VEHICLE
- ☒ SIGHTSEEING/DAY TOUR
- ☒ SUNDRY
- ☒ SURCHARGE FEE
- ☒ TRANSFER

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

Bulk Agent Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS SERVICE **RESULTS**

SELECTED 0 FOUND 4 SELECT ALL UNSELECT ALL

	BOOKING NAME	CONSULTANT	BOOKING REF	TRAVEL DATE	AGENT	LAST SERVICE DATE
☐	Henshaw Mr E	GRB	NZFI104692	08-Dec-2025	AV1PAR	23-Dec-2025
☐	Independent Traders Group	GVE	NZGP104549	19-Dec-2025	RDHHAG	06-Jan-2026
☐	Rodriguez	GVE	NZFI104658	31-Dec-2025	KOLBAS	03-Jan-2026
☐	Halstead Mr & Mrs/Armstrong Mr & Mrs	GRB	NZFI104640	07-Jan-2026	AGALAX	13-Jan-2026

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

SEND

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

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

About Bulk Agent Messaging Fields

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

There are 4 Tabs that include field filter selections:

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

Booking Tab

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Consultant

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

Booking Types

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

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

Reference

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

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

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

Service Tab

Service Date From/To

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

Supplier From/To

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

Service

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

Results Tab

Selected

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

Found

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

Select All/Unselect All

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Agent Messaging, see ["Bulk Documentation" on page 231](#).

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

Selected check boxes

Bookings can be individually selected.

Save Filters for Agent Messages

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

Save Filters for Agent Messages

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

2. Click **Manual**.



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

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

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



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

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



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



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

NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Agent Messaging, if selected for future Bulk Agent Message sending results will be returned based on the saved filters.

10. If **Add** is selected you will return to the results screen, where you can select to **Send** messages (following from [Step 5](#) in the previous procedure), or **Exit**.

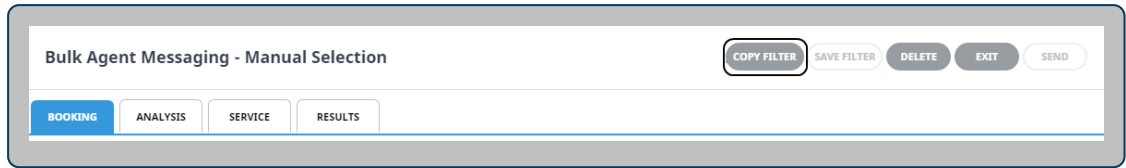


The procedures just described are sufficient to create manual filter criteria to send bulk agent messages from PCMs, and to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check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

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

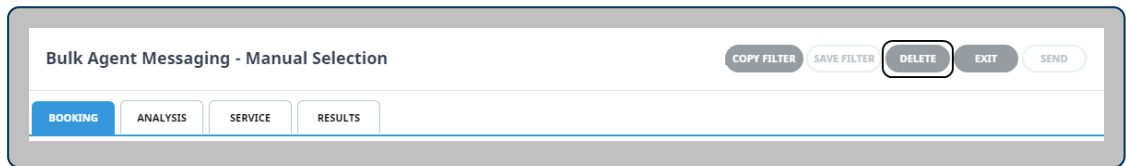
Copy Agent Messaging Filters

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



Deletion of Agent Messaging Filter Descriptions

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



Vouchers

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

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

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

Create Manual Voucher Messaging Filters and Send Messages

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



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

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

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

Booking Tab

Bulk Voucher Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS SERVICE ANALYSIS RESULTS

TRAVEL DATE FROM [calendar icon]
 TRAVEL DATE TO [calendar icon]
 AGENT FROM [dropdown]
 AGENT TO [dropdown]
 MASTER AGENT FROM [dropdown]
 MASTER AGENT TO [dropdown]

DATE ENTERED FROM [calendar icon]
 DATE ENTERED TO [calendar icon]
 CONSULTANT [dropdown]

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

Analysis Tab (Booking Analysis)

Bulk Voucher Messaging - Manual Selection COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

BOOKING TYPE	PAX NATIONALITY	SOURCE
☒ ALL	☒ ALL	☒ ALL
☒ CONFERENCE	☒ ARGENTINA	☒ ADVERTISEMENT
☒ FAM TRIP	☒ AUSTRALIA	☒ BROCHURE
☒ INCENTIVE	☒ CANADA	☒ DIRECT
☒ PACKAGE	☒ CHINA	☒ INTERNET
☒ SERIES	☒ COSTA RICA	☒ TRAVEL AGENT
☒ SPECIAL INTEREST	☒ CZECHIA	☒ TRAVELLED BEFORE
☒ TAILOR MADE/BESPOKE	☒ FRANCE	☒ UNASSIGNED

MARKUP M/A	DOC'S STATUS	REASON REFUSED
☒ ALL	☒ ALL	☒ ALL
☒ MANUAL	☒ FINALISED	☒ BOOKED ELSEWHERE
☒ UNASSIGNED	☒ IN PRODUCTION	☒ ILLNESS
	☒ REQUESTED	☒ PRICE
	☒ UNASSIGNED	☒ SERVICE
		☒ UNABLE TO TRAVEL
		☒ UNASSIGNED

Service Tab

Bulk Voucher Messaging - Manual Selection COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

SERVICE DATE FROM

SERVICE DATE TO

LOCATION

SUPPLIER FROM

SUPPLIER TO

MASTER SUPPLIER FROM

MASTER SUPPLIER TO

SERVICE STATUS	SERVICE	VOUCHER STATUS
☒ ALL	☒ ALL	☒ ALL
☒ AMENDED FROM KK	☒ ACCOMMODATION	☒ ALREADY PRINTED
☒ AMENDED FROM RQ	☒ ACTIVITY	☒ CLOSED
☒ AMENDED FROM WL	☒ CANCELLATION FEE	☒ REPRINT CHANGED
☒ CANCELLED	☒ CRUISE	☒ UNPRINTED
☒ CANCELLED - CHARGE	☒ ENTRANCE FEE	
☒ CONF FROM ALLOCATION	☒ FLIGHT	
☒ CONFIRMED	☒ GUIDE	
☒ CONFIRMED FREESALE	☒ ITINERARY TEXT	
☒ INITIAL STATUS	☒ MEAL	
☒ ITINERARY ONLY	☒ PACKAGE	
☒ NOT BOOKED	☒ RENTAL VEHICLE	
☒ ON REQUEST	☒ SIGHTSEEING/DAY TOUR	
☒ OPTIONAL SERVICE	☒ SUNDRY	
☒ PACKAGE SERVICE	☒ SURCHARGE FEE	
☒ PARTIAL ALLOCATION	☒ TRANSFER	

Analysis Tab (Supplier Analysis)

Bulk Voucher Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS SERVICE **ANALYSIS** RESULTS

SUPPLIER TYPE

- ☒ ALL
- ☒ ACCOMMODATION
- ☒ SIGHTS/MEALS/ACTIVITY/ENTRY
- ☒ TRANSPORT
- ☒ UNASSIGNED

REGION

- ☒ ALL
- ☒ AUCKLAND
- ☒ BANKS PENINSULA
- ☒ BAY OF PLENTY
- ☒ CANTERBURY
- ☒ CENTRAL OTAGO
- ☒ COROMANDEL
- ☒ EAST COAST NORTH ISLAND

ELECTRONIC PAY FLAG

- ☒ ALL
- ☒ ELECTRONIC FUNDS TRANSFER
- ☒ UNASSIGNED

SUPPLIER CHAIN

- ☒ ALL
- ☒ ACCOR HOTELS
- ☒ AMORA HOTELS
- ☒ BELLA VISTA MOTEL GROUP
- ☒ BOUTIQUE HOTELS
- ☒ CHOICE HOTELS
- ☒ DISTINCTION HOTELS
- ☒ HERITAGE HOTELS

BRAND WITHIN CHAIN

- ☒ ALL
- ☒ CITY LIFE
- ☒ COPTHORNE
- ☒ CROWNE PLAZA
- ☒ GRAND MERCURE
- ☒ HERITAGE
- ☒ HOLIDAY INN
- ☒ IBIS

INTERNAL RATING

- ☒ ALL
- ☒ 1.5 STAR
- ☒ 1STAR
- ☒ 2 STAR
- ☒ 2.5 STAR
- ☒ 3 STAR
- ☒ 3.5 STAR
- ☒ 4 STAR

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

Bulk Voucher Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

BOOKING ANALYSIS SERVICE ANALYSIS **RESULTS**

SELECTED	DATE	VOUCHER	SUPPLIER	FOUND	CODE	DESCRIPTION	BOOKING REF	STATUS
☒	08-Dec-2025	103,768	SUSA01	APHOT	APHOT	Airport to Hotel Shuttle Transfer	NZFI104692	KK
☒	08-Dec-2025	103,769	SKCA01	DLHAR	DLHAR	Deluxe Harbourview Room (Level 4 City ...	NZFI104692	KK
☒	09-Dec-2025	103,770	FULA01	AMHACR	AMHACR	Auckland Harbour Cruise	NZFI104692	KK
☒	09-Dec-2025	103,771	BUDN01	IDARI	IDARI	Group D - Intermediate Automatic - All I...	NZFI104692	KK
☒	10-Dec-2025	103,772	WGCW01	WAIRUA	WAIRUA	Waitomo & Ruakuri Cave Combo	NZFI104692	KK
☒	10-Dec-2025	103,773	NOVR01	LAKEVI	LAKEVI	Superior Room Lake View	NZFI104692	KK
☒	11-Dec-2025	103,774	TEPR01	VISIT	VISIT	Guided Tour (90minutes)	NZFI104692	KK
☒	11-Dec-2025	103,777	TAMR01	HANGI	HANGI	Tamaki Maori Village - Hangi & Concert	NZFI104692	KK
☒	12-Dec-2025	103,778	CTHW01	ROHEXE	ROHEXE	Executive Spa Suite	NZFI104692	KK
☒	13-Dec-2025	103,779	AGON01	1DAYTC	1DAYTC	1 day Guided Tongariro Crossing	NZFI104692	KK
☒	14-Dec-2025	103,780	HOIW01	SUPRM	SUPRM	Deluxe Room	NZFI104692	KK
☒	15-Dec-2025	103,781	IILW01	KAITAK	KAITAK	Wellington/Picton Ferry - Premium Plus	NZFI104692	KK
☒	15-Dec-2025	103,782	GMMN01	DELUXE	DELUXE	Standard Room	NZFI104692	KK
☒	16-Dec-2025	103,783	KGHG01	ROH	ROH	Run of House Room	NZFI104692	KK
☒	17-Dec-2025	103,784	APGF01	HDGLAC	HDGLAC	Fox Trot, Half Day Guided Glacier Walk	NZFI104692	KK
☒	17-Dec-2025	103,785	DFGF01	ROHRM	ROHRM	Run of House includes Full Breakfast	NZFI104692	KK
☒	18-Dec-2025	103,786	STMZ01	1BRAPL	1BRAPL	One Bedroom Alpine Lakeview Suite	NZFI104692	KK
☒	19-Dec-2025	103,787	GRSA01	G5500L	G5500L	G5500L Discover Milford Sound Coach/C...	NZFI104692	KK
☐	19-Dec-2025	102,725	PTLC01	CHARTR	CHARTR	Coach Charter	NZGP104549	KK

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

SEND

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

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

Bulk Voucher Messaging EXIT OK

DOCUMENT FORMAT *VOU2 - Voucher Msg*

DOCUMENT DESTINATION *Email*

9. Click **OK** to keep the changes and save or update the entry.
10. Click **Exit** to discard any changes.
11. If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.

Review & Send Document EXIT DOWNLOAD ALL EMAIL EMAIL ALL

DOCUMENT REFERENCE *VCH-NZFI104692-SUSA01-103768-VOU2-2022-10-11* DOWNLOAD

DOCUMENT **SENDING** **ATTACHMENTS**

SUBJECT

— SUPPLIER CONTACTS

SUPPLIER	TYPE	CONTACT NAME	CONTACT DETAIL
TO	All	<i>Voucher Contact</i>	Email: naomi.johns@pa.tourp...

AIRPORT TO HOTEL SHUTTLE TRANSFER

DELUXE HARBOURVIEW ROOM (LEVEL 4 CT

AUCKLAND HARBOUR CRUISE

GROUP D - INTERMEDIATE AUTOMATIC - AI

WAITOMO & RUAKURI CAVE COMBO

SUPERIOR ROOM LAKE VIEW

GUIDED TOUR (90MINUTES)

TAMAKI MAORI VILLAGE - HANGI & CONCE

EXECUTIVE SPA SUITE

1 DAY GUIDED TONGARIRO CROSSING

DELUXE ROOM

WELLINGTON/PICTON FERRY - PREMIUM P

STANDARD ROOM

RUN OF HOUSE ROOM

FOX TROT, HALF DAY GUIDED GLACIER WA

RUN OF HOUSE INCLUDES FULL BREAKFAS

ONE BEDROOM ALPINE LAKEVIEW SUITE

GS500L DISCOVER MILFORD SOUND COACH

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

EXIT DOWNLOAD ALL EMAIL EMAIL ALL

DOCUMENT REFERENCE *VCH-NZFI104692-SUSA01-103768-VOU2-2022-10-11* DOWNLOAD

DOCUMENT **SENDING** **ATTACHMENTS**

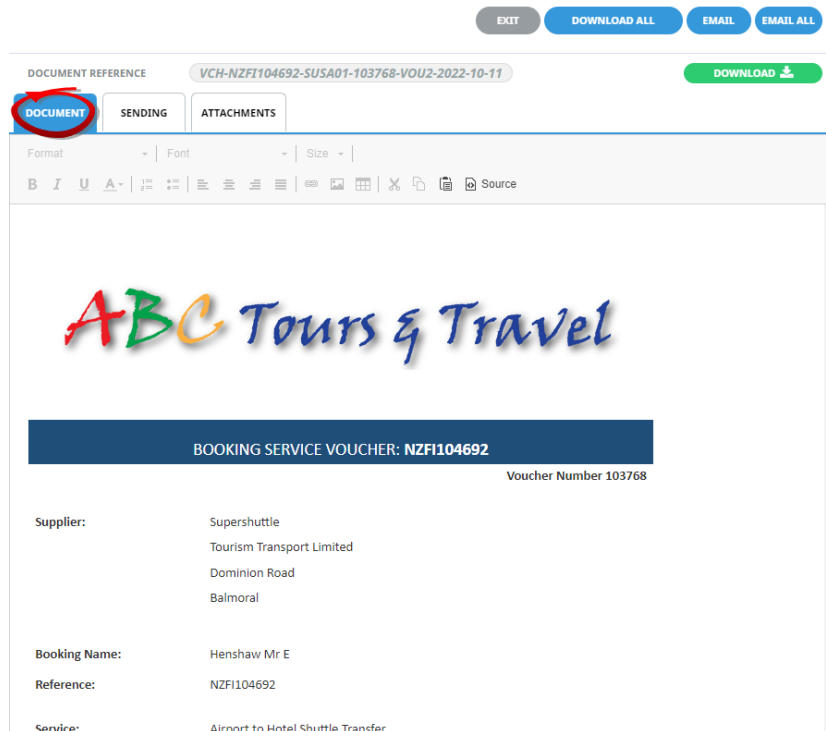
SUBJECT

— SUPPLIER CONTACTS

SUPPLIER	TYPE	CONTACT NAME	CONTACT DETAIL
TO	All	<i>Voucher Contact</i>	Email: naomi.johns@pa.tourp...

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.

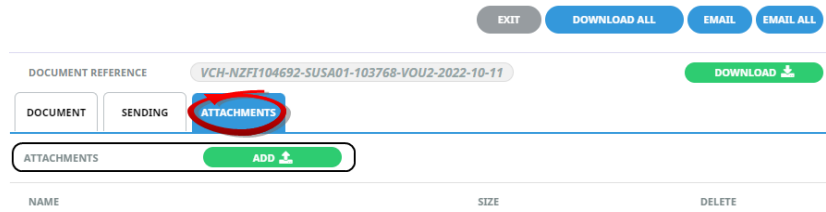
- On the **Document Tab**, you can examine the generated document or download it (using the **Download** button).



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

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

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



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

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



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

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

About Bulk Documentation - Voucher Messaging Filter Selections

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

There are 4 Tabs that include field filter selections:

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

Booking Tab

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

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

Date Entered From/To

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

Consultant

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

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking Analysis)

Booking Analysis

These are booking level selections.

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

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

Service Tab

Service Date From/To

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

Supplier From/To

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

Master Supplier From/To

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

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

Location

Used to select services in a specific location.

Service Status

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

Service

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

Voucher Status

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

Analysis Tab (Supplier Analysis)

Supplier Analysis

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

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

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

Results Tab

Selected

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

Found

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

Select All/Unselect All

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Voucher Messaging, see ["Bulk Documentation" on page 231](#).

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

Selected check boxes

Services can be individually selected.

Save Filters for Vouchers

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

Save Filters Procedure for Vouchers

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



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

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

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

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



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



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



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

NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Voucher Messaging. If selected for future Bulk Voucher Message sending - results will be returned based on the saved filters.

10. If **Add** is selected you will return to the results screen, where you can select to **Send** messages (following from [Step 5](#) in the previous procedure), or **Exit**.



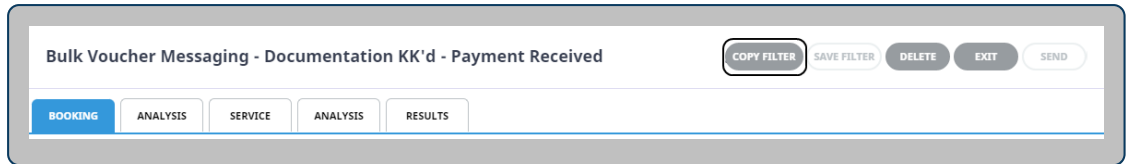
The procedures just described are sufficient to create manual filter criteria to send bulk voucher run from to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation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

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

Copy Voucher Filters

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

and re-save giving the newly copied filters a new description.

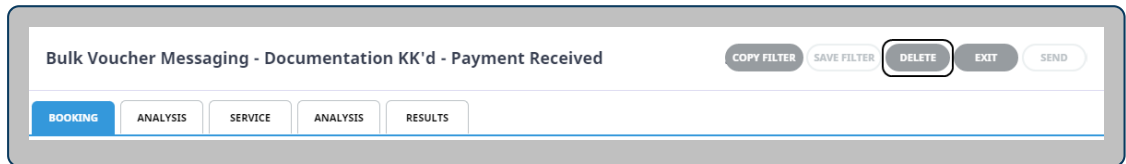


The screenshot shows a web interface for 'Bulk Voucher Messaging - Documentation KK'd - Payment Received'. At the top right, there are five buttons: 'COPY FILTER' (highlighted with a red border), 'SAVE FILTER', 'DELETE', 'EXIT', and 'SEND'. Below these buttons is a horizontal menu with five tabs: 'BOOKING' (active, highlighted in blue), 'ANALYSIS', 'SERVICE', 'ANALYSIS', and 'RESULTS'.

Deletion of Voucher Filter Descriptions

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

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



This screenshot is identical to the one above, showing the same interface for 'Bulk Voucher Messaging - Documentation KK'd - Payment Received'. In this instance, the 'DELETE' button at the top right is highlighted with a red border, indicating the action being performed.

PCM Supplier Messaging

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

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

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

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

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

Bulk Supplier Messaging - Accommodation NB Service Status for KK Booking Statu

COPY FILTER

SAVE FILTER

DELETE

EXIT

SEND

BOOKING

ANALYSIS

SERVICE

ANALYSIS

RESULTS

SELECTED

0

FOUND

92

SELECT ALL

UNSELECT ALL

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

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

Bulk Supplier Messaging EXIT OK

DOCUMENT FORMAT: SBRQ - Supplier Request

CONSOLIDATE BY: NONE ☒ SUPPLIER MASTER SUPPLIER BOOKING SINGLE DOCUMENT

ORDER BY: ☒ SERVICE DATE PICKUP DATE/TIME SUPPLIER CODE

SERVICE STATUS: UPDATE STATUS

DOCUMENT DESTINATION: Email

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

Create Manual Supplier Messaging Filters and Send Messages

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

2. Click **Manual**.



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

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

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

4. Check the **completed** screens.

Service Tab

Bulk PCM Supplier Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

PCM ANALYSIS **SERVICE** ANALYSIS RESULTS

SERVICE DATE FROM

SERVICE DATE TO

SUPPLIER FROM

SUPPLIER TO

MASTER SUPPLIER FROM

MASTER SUPPLIER TO

LOCATION

SERVICE STATUS

SERVICE

Analysis Tab (PCM Analysis)

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

PCM **ANALYSIS** SERVICE ANALYSIS RESULTS

PCM TYPE

MARKUP TYPE

PCM Tab

PCM
ANALYSIS
SERVICE
ANALYSIS
RESULTS

BASE DATE FROM
BASE DATE TO
AGENT FROM
AGENT TO
MASTER AGENT FROM
MASTER AGENT TO

DATE ENTERED FROM
DATE ENTERED TO
CONSULTANT
REFERENCE

PCM STATUS
☒ ALL
☒ CANCELLED
☒ MASTER
☒ PACKAGE
☒ QUOTE

BRANCH
☒ ALL
☒ AUSTRALIAN OFFICE
☒ NZ OFFICE
☒ USA OFFICE

DEPARTMENT
☒ ALL
☒ COASTAL EXCURSIONS
☒ FIT
☒ GROUPS
☒ INCENTIVES
☒ INTERNET FIT
☒ SERIES TOURS
☒ SHORE EXCURSIONS
☒ SPECIAL GROUPS

Analysis Tab (Supplier)

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

PCM
ANALYSIS
SERVICE
ANALYSIS
RESULTS

SUPPLIER TYPE
☒ ALL
☒ ACCOMMODATION
☒ SIGHTS/MEALS/ACTIVITY/ENTRY
☒ TRANSPORT
☒ UNASSIGNED

REGION
☒ ALL
☒ AUCKLAND
☒ BANKS PENINSULA
☒ BAY OF PLENTY
☒ CANTERBURY
☒ CENTRAL OTAGO
☒ COROMANDEL
☒ EAST COAST NORTH ISLAND

ELECTRONIC PAY FLAG
☒ ALL
☒ ELECTRONIC FUNDS TRANSFER
☒ UNASSIGNED

SUPPLIER CHAIN
☒ ALL
☒ ACCOR HOTELS
☒ AMORA HOTELS
☒ BELLA VISTA MOTEL GROUP
☒ BOUTIQUE HOTELS
☒ CHOICE HOTELS
☒ DISTINCTION HOTELS
☒ HERITAGE HOTELS

BRAND WITHIN CHAIN
☒ ALL
☒ CITY LIFE
☒ COTHORNE
☒ CROWNE PLAZA
☒ GRAND MERCURE
☒ HERITAGE
☒ HOLIDAY INN
☒ IBIS

INTERNAL RATING
☒ ALL
☒ 1.5 STAR
☒ 1STAR
☒ 2 STAR
☒ 2.5 STAR
☒ 3 STAR
☒ 3.5 STAR
☒ 4 STAR

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

PCM	ANALYSIS	SERVICE	ANALYSIS	RESULTS						
SELECTED		2		FOUND	7		SELECT ALL		UNSELECT ALL	
☐	DATE	SUPPLIER	CODE	DESCRIPTION	PCM REFERENCE	STATUS	SUPPLIER CONF.			
☐	04-Apr-2025	HERA01	ROH	Superior Room	100024	PS				
☐	07-Apr-2025	ANZN01	ROTCHC	Domestic Flight ROT - CHC	100027	PS				
☐	07-Apr-2025	ANZN01	ROTCHC	Domestic Flight ROT - CHC	100031	PS				
☒	09-Apr-2025	KGHG01	PREMIU	Superior Room	100025	PS				
☒	09-Apr-2025	KGHG01	PREMIU	Superior Room	100026	PS				
☐	12-Apr-2025	BPHW01	STAND	Standard Room	100040	QO				
☐	14-Apr-2025	NOVC01	ASUP	Superior Room	100028	PS				

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

SEND

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

Bulk PCM Supplier Messaging EXIT OK

DOCUMENT FORMAT *PSRQ - PCM Supplier Request for Quote*

CONSOLIDATE BY ☐ NONE ☒ SUPPLIER ☐ MASTER SUPPLIER ☐ PCM ☐ SINGLE DOCUMENT

SERVICE STATUS ☐ UPDATE STATUS

DOCUMENT DESTINATION *Email*

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

Bulk PCM Supplier Messaging EXIT OK

DOCUMENT FORMAT *PSRQ - PCM Supplier Request for Quote*

CONSOLIDATE BY ☐ NONE ☒ SUPPLIER ☐ MASTER SUPPLIER ☐ PCM ☐ SINGLE DOCUMENT

SERVICE STATUS ☐ UPDATE STATUS

DOCUMENT DESTINATION *Email*

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

10. Click **OK** to keep the changes and save or update the entry.
11. Click **Exit** to discard any changes.
12. If **OK** is clicked, the **Send & Review Document** screen displays and a full list of the services selected will show on the left of the screen.

Review & Send Document EXIT DOWNLOAD ALL EMAIL EMAIL ALL

THE HERITAGE AUCKLAND
KINGSGATE HOTEL GREYMOUTH
 AIR NEW ZEALAND LTD
 NOVOTEL CHRISTCHURCH
 BAY PLAZA HOTEL

DOCUMENT REFERENCE *PSP-KGHG01-PSRQ-2025-04-16-23-08-36* DOWNLOAD

DOCUMENT EMAIL **SENDING** ATTACHMENTS

SUBJECT *Request Rate/Availability - 100025 / 6 Day Mountains Forest & Lakes*

SUPPLIER CONTACTS

	SUPPLIER	TYPE	CONTACT NAME	CONTACT DETAIL
TO	Kingsgate Hotel...	(RS)	<i>Central Reservations</i>	Email : WholesaleReservations@hot...
CC	All			Email:
BCC	All			Email:

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

Review & Send Document

DOCUMENT REFERENCE

PSP-KGHG01-PSRQ-2025-04-16-22-21-23

DOWNLOAD

DOCUMENT

EMAIL

SENDING

ATTACHMENTS

SUBJECT

Request Rate/Availability - 100025 / 6 Day Mountains Forest & Lakes

— SUPPLIER CONTACTS

	SUPPLIER	TYPE	CONTACT NAME	CONTACT DETAIL
TO	Kingsgate Hotel Grey...	All	Central Reservations	Email: naomi.johns@pa.tourplan.com
CC		All		Email:
BCC		All		Email:

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

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

DOCUMENT REFERENCE

PSP-KGHG01-PSRQ-2025-04-16-23-08-36

DOWNLOAD

DOCUMENTEMAILSENDINGATTACHMENTS

FormatFontSizeSource

ABC Tours & Travel

REQUEST FOR RATE/AVAILABILITY

To:Kingsgate Hotel Greymouth
From:ABC Tours – Reservations
Date:16 Apr 25

We are providing a quote to client for travel around 08 Apr 25 and ask if you can advise the rate and availability as detailed below.

Quote Name:6 Day Mountains Forest & Lakes

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

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

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

DOCUMENT REFERENCE: PSP-KGHG01-PSRQ-2025-04-16-23-08-36

DOWNLOAD

DOCUMENT EMAIL SENDING **ATTACHMENTS**

ATTACHMENTS

ADD

NAME	SIZE	DELETE
------	------	--------

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

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



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

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

About Bulk Supplier Messaging Filters

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

There are 4 Tabs that include field filter selections:

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

PCM Tab

Base Date From/To

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

Agent From/To

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

Master Agent From/To

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

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

Date Entered From/To

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

Consultant

The consultant code attached to the PCM.

Reference

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

PCM Status

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

Branch

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

Department

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

Analysis Tab (PCM)

PCM Analysis

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

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

Service Tab

Service Date From/To

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

Supplier From/To

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

Master Supplier From/To

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

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

Location

Used to select services in a specific location.

Service Status

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

Service

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

Analysis Tab (Supplier Analysis)

Supplier Analysis

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

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

Results Tab

Selected

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

Found

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

Select All/Unselect All

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Supplier Messaging, see ["Bulk Documentation" on page 231](#).

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

Selected check boxes

Services can be individually selected.

Save Filters for Supplier Messages

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

Save Filters for Supplier Messages

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

2. Click **Manual**.



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

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

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

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



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



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



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

NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the description will display each time a user opens Bulk Supplier Messaging. If selected for future Bulk Supplier Message sending, results will be returned based on the saved filters.

10. If **Add** is selected the results screen will re-display, where you can select to **Send** messages (following from [Step 5](#) in the previous procedure), or **Exit**.

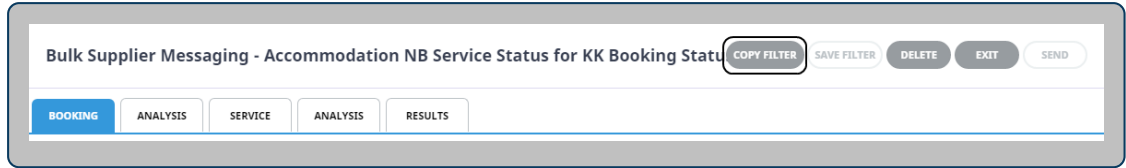


The procedures just described are sufficient to create manual filter criteria to send bulk supplier messages from PCMs, and to save filters for future use. There are many unique filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields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

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

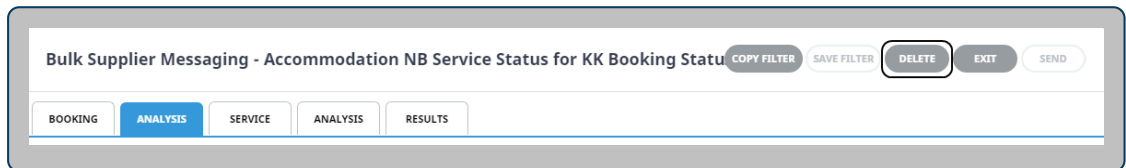
Copy Supplier Messaging Filters

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



Deletion of Supplier Messaging Filter Descriptions

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



PCM Agent Messaging

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

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

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

Create Manual Agent Messaging Filters and Send Messages

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



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

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

PCM Tab

Bulk PCM Agent Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

PCM ANALYSIS SERVICE RESULTS

BASE DATE FROM DATE ENTERED FROM
 BASE DATE TO DATE ENTERED TO
 AGENT FROM AGENT TO
 MASTER AGENT FROM MASTER AGENT TO
 CONSULTANT REFERENCE

PCM STATUS BRANCH DEPARTMENT

☒ ALL
☒ CANCELLED
☒ MASTER
☒ PACKAGE
☒ QUOTE

☒ ALL
☒ AUSTRALIAN OFFICE
☒ NZ OFFICE
☒ USA OFFICE

☒ ALL
☒ COASTAL EXCURSIONS
☒ FIT
☒ GROUPS
☒ INCENTIVES
☒ INTERNET FIT
☒ SERIES TOURS
☒ SHORE EXCURSIONS
☒ SPECIAL GROUPS

Analysis Tab

PCM ANALYSIS SERVICE RESULTS

PCM TYPE MARKUP TYPE

☒ ALL
☒ CONFERENCE
☒ FAM TRIP
☒ INCENTIVE
☒ PACKAGE
☒ SERIES
☒ SPECIAL INTEREST
☒ TAILOR MADE/BESPOKE

☒ ALL
☒ MANUAL
☒ STANDARD
☒ UNASSIGNED

Services Tab

PCM ANALYSIS **SERVICE** RESULTS

SERVICE DATE FROM

SERVICE DATE TO

SUPPLIER FROM

SUPPLIER TO

SERVICE STATUS

- ☒ ALL
- ☒ OPTIONAL SERVICE
- ☒ PACKAGE SERVICE
- ☒ QUOTE ONLY

SERVICE

- ☒ ALL
- ☒ ACCOMMODATION
- ☒ ACTIVITY
- ☒ CANCELLATION FEE
- ☒ CRUISE
- ☒ ENTRANCE FEE
- ☒ FLIGHT
- ☒ GUIDE
- ☒ ITINERARY TEXT
- ☒ MEAL
- ☒ PACKAGE
- ☒ RENTAL VEHICLE
- ☒ SIGHTSEEING/DAY TOUR
- ☒ SUNDRY

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

Bulk PCM Agent Messaging - Manual Selection

COPY FILTER SAVE FILTER DELETE EXIT SEND

PCM ANALYSIS SERVICE **RESULTS**

SELECTED 0 FOUND 53

SELECT ALL UNSELECT ALL

PCM NAME	PCM REFERENCE	BASE DATE	CONSULTANT
4 Day Salls & Sulphur	100024	04-Apr-2025	GRB
6 Day Mountains Forest & Lakes	100025	08-Apr-2025	GRB
8 Day Super South	100026	08-Apr-2025	GRB
12 Day Best of New Zealand	100027	04-Apr-2025	GRB

SEND

6. To send the messages, click **Send**.
7. Click **Exit** to discard any changes.
8. If Send is clicked, the **Bulk PCM Agent Messaging** screen will display. Select the **Document Format**, and the **Document Destination**.

Bulk PCM Agent Messaging

EXIT OK

DOCUMENT FORMAT *PCOS - PCM Cost Sheet - Internal*

DOCUMENT DESTINATION *Email*

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

Review & Send Document

DOCUMENT REFERENCE: PAG-6DayMountainsForestLakes-PKGBKG-PCOS-26

DOCUMENT: 6 DAY MOUNTAINS FOREST & LAKES

PCOS ID 6466

PK (PCOS Status)

Package (Status Description)

Entered: 25 Feb 25 / Last Work 11 Mar 25

Agent: Packages Debtor

Worksheet for: 6 Day Mountains Forest & Lakes (PCOS Name)

Tour Date - Start: 08 Apr 25

Tour Date - End: 13 Apr 25

Consultant: GRB - Geoff

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

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

DOCUMENT REFERENCE: PAG-4DaySailsSulphur-PKGBKG-PCOS-2025-04-17-6

DOCUMENT: 4 DAY SAILS & SULPHUR

SUBJECT

AGENT CONTACTS

AGENT	TYPE	CONTACT NAME	CONTACT DETAIL
TO	All		Email: agent@email.com

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.

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

DOCUMENT REFERENCE **PAG-4DaySailsSulphur-PKGBKG-PCOS-2025-04-17-0** **DOWNLOAD**

DOCUMENT **SENDING** **ATTACHMENTS**

Format Font Size

B I U A | | | | | | | | | Source

PCM ID 6465	17 Apr 25
PK (PCM Status)	
Package (Status Description)	Worksheet for: 4 Day Sails & Sulphur (PCM Name)
Entered: 25 Feb 25 / Last Work 10 Apr 25	
Agent: Packages Debtor	Tour Date - Start: 04 Apr 25 Tour Date - End: 07 Apr 25 Consultant: GRB - Geoff

<ct>

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

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

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

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

DOCUMENT REFERENCE

PAG-4DaySailsSulphur-PKGBKG-PCOS-2025-04-17-6

DOWNLOAD 

DOCUMENT

SENDING

ATTACHMENTS

ATTACHMENTS

ADD 

NAME	SIZE	DELETE
------	------	--------

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

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

EMAIL

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

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

About Bulk Agent Messaging Fields

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

There are 4 Tabs that include field filter selections:

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

PCM Tab

Base Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Consultant

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

Reference

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

Booking Status

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

Branch

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

Department

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

Analysis Tab (PCM Analysis)

PCM Analysis

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

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

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

Service Tab

Service Date From/To

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

Supplier From/To

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

Service Status

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

Service

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

Results Tab

Selected

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

Found

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

Select All/Unselect All

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Agent Messaging, see ["Bulk Documentation" on page 231](#).

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

Selected check boxes

PCMs can be individually selected.

Save Filters for Agent Messages

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

Save Filters for Agent Messages

1. From the Home menu, select **Home > Operations > Bulk Documentation > PCM Quotes > Agent Messaging**.
2. Click **Manual**.
3. On the blank Bulk Agent Messaging - Manual Selection screen, the **PCM Tab** will open. Select the required filters from the field selections available within the **PCM Tab**, **Analysis Tab (Booking and Agent)** and the **Service Tab**.
View [Agent PCM Filter Selections](#) to learn more about all field selections available, or view the individual tab filters: [PCM](#), [Analysis](#) (Booking and Agent), [Service](#) or [Results](#).
4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

SAVE FILTER

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

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

New Selection

EXIT

ADD

DESCRIPTION

Manual Selection

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

ADD

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

NOTE: If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Agent Messaging, if selected for future Bulk Agent Message sending results will be returned based on the saved filters.

10. If **Add** is selected you will return to the results screen, where you can select to **Send** messages (following from [Step 5](#) in the previous procedure), or **Exit**.

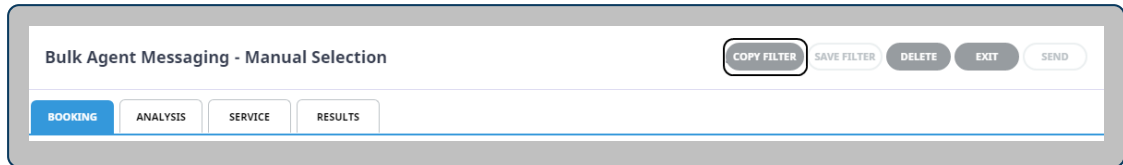


The procedures just described are sufficient to create manual filter criteria to send bulk agent messages from, and to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down fields or check boxes.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

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

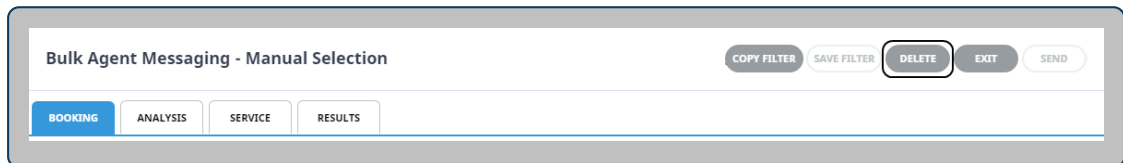
Copy Agent Messaging Filters

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



Deletion of Agent Messaging Filter Descriptions

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



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CHAPTER 3

Booking Operations

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

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

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

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Substitute Service

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

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

NOTE: Services will not be substituted if:

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

Substitute Service

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

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

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

Filter Tab

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

BOOKING STATUS	SERVICE STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ AMENDED FROM KK	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AMENDED FROM RQ	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ AMENDED FROM WL	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ CANCELLED	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ CANCELLED - CHARGE	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ CONF FROM ALLOCATION	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ CONFIRMED	☒ USA OFFICE	☒ SERIES TOURS
	☒ CONFIRMED FREESALE		☒ SHORE EXCURSIONS
	☒ INITIAL STATUS		☒ SPECIAL GROUPS
	☒ ITINERARY ONLY		☒ UNASSIGNED
	☒ NOT BOOKED		
	☒ ON REQUEST		
	☒ OPTIONAL SERVICE		
	☒ PACKAGE SERVICE		

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

Analysis Tab

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

Substitute Service

EXIT

OK

FILTER

ANALYSIS

RESULTS

BOOKING TYPE	PAX NATIONALITY	SOURCE
☒ ALL	☒ ALL	☒ ALL
☒ CONFERENCE	☒ ARGENTINA	☒ ADVERTISEMENT
☒ FAM TRIP	☒ AUSTRALIA	☒ BROCHURE
☒ INCENTIVE	☒ CANADA	☒ DIRECT
☒ PACKAGE	☒ CHINA	☒ INTERNET
☒ SERIES	☒ COSTA RICA	☒ TRAVEL AGENT
☒ SPECIAL INTEREST	☒ CZECHIA	☒ TRAVELLED BEFORE
☒ TAILOR MADE/BESPOKE	☒ FRANCE	☒ UNASSIGNED

MARKUP M/A	DOC'S STATUS	REASON REFUSED
☒ ALL	☒ ALL	☒ ALL
☒ MANUAL	☒ FINALISED	☒ BOOKED ELSEWHERE
☒ UNASSIGNED	☒ IN PRODUCTION	☒ ILLNESS
	☒ REQUESTED	☒ PRICE
	☒ UNASSIGNED	☒ SERVICE
		☒ UNABLE TO TRAVEL
		☒ UNASSIGNED

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

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

Substitute Service EXIT OK

FILTER	ANALYSIS	RESULTS
☐	LOCATION	SERVICE
☐	AKL	AC
☐	AKL	AC
☐	AKL	AC

SUBSTITUTE SERVICE

SERVICE LINES

PICKUP DETAILS

00:00

DROP-OFF DETAILS

00:00

REMARKS

EDIT DETAILS

PICKUP/DROP-OFF

FOUND 3

SELECTED 0

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

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

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

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

Replacement Service EXIT OK

LOCATION: HLZ - Hamilton

SERVICE: AC - Accommodation

SUPPLIER: KGHHD1 - Kingsgate Hotel Hamilton

CODE: ROH

SERVICE STATUS: (Default)

☒ RETAIN SELL PRICE

☒ RETAIN VOUCHER TEXT

ENTER PICKUP/DROP-OFF DETAILS

PICKUP TIME: 00:00

DROPOFF TIME: 00:00

REMARKS:

- Keeping with the **Replacement Service** screen, select *Service Status*.
- Click **OK** to keep the changes and save or update the entry.
- Click **Exit** to discard any changes.
- If '**OK**' was selected a Summary will appear with the number of successful services to be updated.

Summary OK

NUMBER OF SUCCESSFUL OPERATIONS: 1

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

About Substitute Service Fields

Filter Tab

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

Substitute Service EXIT OK

FILTER **ANALYSIS** **RESULTS**

CURRENT SERVICE

LOCATION

SERVICE

SUPPLIER

CODE

BOOKING FILTER

SERVICE DATE FROM

SERVICE DATE TO

AGENT FROM

AGENT TO

BOOKING STATUS

☒ ALL

☒ CANCELLED

☒ CANCELLED WITH COST

☒ CONFIRMED

☒ DEPOSIT INVOICE

☒ FINALISED

☒ INVOICED

☒ QUOTATION

SERVICE STATUS

☒ ALL

☒ AMENDED FROM KK

☒ AMENDED FROM RQ

☒ AMENDED FROM WL

☒ CANCELLED

☒ CANCELLED - CHARGE

☒ CONF FROM ALLOCATION

☒ CONFIRMED

☒ CONFIRMED FREESALE

☒ INITIAL STATUS

☒ ITNERARY ONLY

☒ NOT BOOKED

☒ ON REQUEST

☒ OPTIONAL SERVICE

☒ PACKAGE SERVICE

BRANCH

☒ ALL

☒ ADMINISTRATION

☒ AUSTRALIAN OFFICE

☒ BALANCE SHEET

☒ NZ OFFICE

☒ ONLINE SALES

☒ UNASSIGNED

☒ USA OFFICE

DEPARTMENT

☒ ALL

☒ ADMINISTRATION

☒ COASTAL EXCURSIONS

☒ FIT

☒ GROUPS

☒ INCENTIVES

☒ INTERNET FIT

☒ SERIES TOURS

☒ SHORE EXCURSIONS

☒ SPECIAL GROUPS

☒ UNASSIGNED

Current Service Fields

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

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

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

Booking Filter

Service Date From/To

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

Agent From/To

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

Booking Status Section

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

Service Status Section

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

Booking Branch Section

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

Booking Department Selection

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

Analysis Tab (Booking Analysis)

Substitute Service EXIT OK

FILTER **ANALYSIS** **RESULTS**

BOOKING TYPE	PAX NATIONALITY	SOURCE
☒ ALL	☒ ALL	☒ ALL
☒ CONFERENCE	☒ ARGENTINA	☒ ADVERTISEMENT
☒ FAM TRIP	☒ AUSTRALIA	☒ BROCHURE
☒ INCENTIVE	☒ CANADA	☒ DIRECT
☒ PACKAGE	☒ CHINA	☒ INTERNET
☒ SERIES	☒ COSTA RICA	☒ TRAVEL AGENT
☒ SPECIAL INTEREST	☒ CZECHIA	☒ TRAVELLED BEFORE
☒ TAILOR MADE/BESPOKE	☒ FRANCE	☒ UNASSIGNED

MARKUP M/A	DOC'S STATUS	REASON REFUSED
☒ ALL	☒ ALL	☒ ALL
☒ MANUAL	☒ FINALISED	☒ BOOKED ELSEWHERE
☒ UNASSIGNED	☒ IN PRODUCTION	☒ ILLNESS
	☒ REQUESTED	☒ PRICE
	☒ UNASSIGNED	☒ SERVICE
		☒ UNABLE TO TRAVEL
		☒ UNASSIGNED

Analysis Codes

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

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

Results Tab

Selected check boxes

Services can be individually selected.

Select All/Unselect All

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

Service Lines

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

Found

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

Selected

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Substitute Services, see ["Booking Operations" on page 226](#).

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

About Replacement Service Selection

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

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

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

Service Status

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

Retain Sell Price

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

Retain Voucher Text

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

Enter Pickup/Drop-off Details

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

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

Update Pickup & Dropoff

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

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

Updating Pick Up & Drop Off Details

1. From the Home menu, select **Home > Operations > Booking Operations > Update Pickup and Dropoff**.
2. On the blank **Update Pickup/Dropoff** screen, the **Service Tab** will open, select fields to narrow the search filter results.

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

The screenshot displays the 'Update Pickup/Dropoff' interface. At the top, there are buttons for EXIT, DISCARD, SAVE, and SEARCH. Below these are tabs for BOOKING, ANALYSIS, SERVICE (highlighted with a red circle), ANALYSIS, and RESULTS. The main area contains several filter fields: SERVICE DATE FROM/TO, SUPPLIER FROM/TO, CODE FROM/TO, PICKUP TIME RANGE (00:00 to 23:59), and DROPOFF TIME RANGE (00:00 to 23:59). There are also fields for DATE ENTERED FROM/TO, MASTER SUPPLIER FROM/TO, and LOCATION. At the bottom, there are two scrollable lists: 'SERVICE STATUS' and 'SERVICE', both with checkboxes for selection. The 'SAVE' button is visible in the top right corner.

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

Update Pickup/Dropoff EXIT DISCARD SAVE SEARCH

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
☒ BOOKING		PRODUCT		PAX PU/DO DETAILS
☒ Bolton Mr P & Mrs K USF1104705		CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer		2 06-May-2025 06-May-2025
☒ Brammeld Mr L & Ms L USF1104703		CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer		2 06-May-2025 06-May-2025
☒ Douglas Mr K & Mrs L USF1104701		CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer		2 06-May-2025 06-May-2025
☒ Motrum Mr B & Mrs F USF1104702		CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer		2 06-May-2025 06-May-2025
☒ Williamson Mr K & Mrs R USF1104704		CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer		2 06-May-2025 06-May-2025

> SELECT ALL UNSELECT ALL

☒ SELECT SERVICE

PICKUP DETAILS

06-May-2025 📅 00:00

DROP-OFF DETAILS

06-May-2025 📅 00:00

REMARKS

EDIT SERVICE DETAILS

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

> SELECT ALL UNSELECT ALL

☒ SELECT SERVICE

PICKUP DETAILS

06-May-2025 📅 00:00

DROP-OFF DETAILS

06-May-2025 📅 00:00

REMARKS

EDIT SERVICE DETAILS

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

EDIT SERVICE DETAILS

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

- Click **Save** to keep the changes.
- Click **Exit** to discard any changes.
- If **Save** was selected a Summary will appear with the number of successful bookings to be updated.
- Click **OK** to exit the modal.
- The **Update Pick Up and Drop Off Results** tab will re-display, the service details will have updated and can be viewed from here.

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
BOOKING		PRODUCT	PAX PU/DO DETAILS	
☒	Bolton Mr P & Mrs K USF1104705	CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer	2 06-May-2025 06-May-2025	Pick up 10:00am
☒	Brammied Mr L & Ms L USF1104703	CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer	2 06-May-2025 06-May-2025	Pick up 10:00am
☒	Douglas Mr K & Mrs L USF1104701	CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer	2 06-May-2025 06-May-2025	Pick up 10:00am
☒	Motrum Mr B & Mrs F USF1104702	CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer	2 06-May-2025 06-May-2025	Pick up 10:00am
☒	Williamson Mr K & Mrs R USF1104704	CHC/TF/SUSA01/HOTAPT Hotel to Airport Shuttle Transfer	2 06-May-2025 06-May-2025	Pick up 10:00am

About Update Pick Up/Drop Off Fields

Service Tab

Service Date From/To

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

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

Supplier From/To

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

Code From/To

This is the service code or range of service codes.

Pick up Time Range

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

Pick up Remarks

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

Service Remarks

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

Date Entered From/To

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

Master Supplier From/To

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

Location

The location code selection displays results for service in the booking matching the location.

Drop off Time Range

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

Drop off Remarks

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

Service Status

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

Service Type

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

Booking Tab

Travel Date From/To

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

Booking Name

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

Booking Ref From/To

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

Agent From/To

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

Consultant

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

Last Service Date From/To

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

Date Entered From/To

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

Booking Type

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

Master Agent From/To

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

Currency

Used to select bookings with a particular booking currency.

Booking Status

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

Branch

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

Department

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

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

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

Service Analysis

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

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

Bulk Service Insert

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

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



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

Bulk Service Insert

1. From the Home menu, select **Home > Operations > Booking Operations > Bulk Service Insert**.
2. On the blank **Bulk Service Insert - Manual Selection** screen, the **Booking Tab** opens. Complete the fields necessary to filter a list of Booking results. .

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

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

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

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

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

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

BOOKING TYPE

- ☒ ALL
- ☒ CONFERENCE
- ☒ FAM TRIP
- ☒ INCENTIVE
- ☒ PACKAGE
- ☒ SERIES
- ☒ SPECIAL INTEREST
- ☒ TAILOR MADE/BESPOKE

MARKUP M/A

- ☒ ALL
- ☒ MANUAL
- ☒ UNASSIGNED

PAX NATIONALITY

- ☒ ALL
- ☒ ARGENTINA
- ☒ AUSTRALIA
- ☒ CANADA
- ☒ CHINA
- ☒ COSTA RICA
- ☒ CZECHIA
- ☒ FRANCE

DOC'S STATUS

- ☒ ALL
- ☒ FINALISED
- ☒ IN PRODUCTION
- ☒ REQUESTED
- ☒ UNASSIGNED

SOURCE

- ☒ ALL
- ☒ ADVERTISEMENT
- ☒ BROCHURE
- ☒ DIRECT
- ☒ INTERNET
- ☒ TRAVEL AGENT
- ☒ TRAVELLED BEFORE
- ☒ UNASSIGNED

REASON REFUSED

- ☒ ALL
- ☒ BOOKED ELSEWHERE
- ☒ ILLNESS
- ☒ PRICE
- ☒ SERVICE
- ☒ UNABLE TO TRAVEL
- ☒ UNASSIGNED

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

SERVICE

SERVICE DATE FROM:

SERVICE DATE TO:

SUPPLIER FROM:

SUPPLIER TO:

MASTER SUPPLIER FROM:

MASTER SUPPLIER TO:

LOCATION:

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

Service Tab

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

SERVICE STATUS

- ☒ ALL
- ☒ AMENDED FROM KK
- ☒ AMENDED FROM RQ
- ☒ AMENDED FROM WL
- ☒ CANCELLED
- ☒ CANCELLED - CHARGE
- ☒ CANCELLED EXTERNALLY
- ☒ CONF FROM ALLOCATION
- ☒ CONFIRMED
- ☒ CONFIRMED EXTERNALLY
- ☒ CONFIRMED FREESALE
- ☒ INITIAL STATUS
- ☒ ITINERARY ONLY
- ☒ NOT BOOKED

SERVICE

- ☒ ALL
- ☒ ACCOMMODATION
- ☒ ACTIVITY
- ☒ CANCELLATION FEE
- ☒ CRUISE
- ☒ ENTRANCE FEE
- ☒ FLIGHT
- ☒ GUIDE
- ☒ ITINERARY TEXT
- ☒ MEAL
- ☒ PACKAGE
- ☒ RENTAL VEHICLE
- ☒ SIGHTSEEING/DAY TOUR
- ☒ SUNDRY

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

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

BOOKING		ANALYSIS		SERVICE		RESULTS	
SELECTED		0		FOUND		3	
						SELECT ALL	
						UNSELECT ALL	
	BOOKING NAME	CONSULTANT	BOOKING REF	TRAVEL DATE	AGENT	LAST SERVICE DATE	STATUS
	Cultuur Vakanties Group 010625	PNJ	NZSE104723	01-jun-2025	RDHHAG	10-jun-2025	Quotation
	Cultuur Vakanties Group 080625	PNJ	NZSE104725	08-jun-2025	RDHHAG	17-jun-2025	Quotation
	Cultuur Vakanties Group 050625	PNJ	NZSE104726	15-jun-2025	RDHHAG	24-jun-2025	Quotation

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

INSERT

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

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

Service Line Insert

EXIT

SELECTIONRESULTS

ALL SERVICES

ACCOMMODATION

ACTIVITY

CANCELLATION FEE

CRUISE

ENTRANCE FEE

FLIGHT

GUIDE

ITINERARY TEXT

MEAL

PACKAGE

RENTAL VEHICLE

SIGHTSEEING/DAY TOUR

SUNDRY

SURCHARGE FEE

TRANSFER

TRANSPORT

DAY/SEQ.

1 / 40

SERVICE DATE

02-Jun-2025

Monday

SCU

1

COUNTRY

DESTINATION

LOCATION

SUPPLIER

CODE

FIND PRODUCTS

+ PRICE CODE

11. Click **Find Products**.

[FIND PRODUCTS](#)

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

SELECTION	RESULTS									
Q	INSERT	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	AVAILABLE	RETAIL	AGENT	
INSERT	Surcharge Fee	Willowbank Wildlife Reserve	Wildlife Surcharge			RQ		10.00	10.00	

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

INSERT

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

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

BOOKING NAME	REFERENCE	TRAVEL DATE	CONSULTANT
Cultuur Vakanties Group 010625	NZSE104723	01-Jun-2025	PNJ
Cultuur Vakanties Group 050625	NZSE104726	15-Jun-2025	PNJ
Cultuur Vakanties Group 080625	NZSE104725	08-Jun-2025	PNJ

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

About Bulk Service Insert Fields

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

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

Booking Tab

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

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Booking Types

Groups - those bookings that are Group bookings will be selected.

Consultant

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

Reference

Used to select a specific Booking reference.

Booking Status

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

Branch

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

Department

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

Analysis Tab

Booking Analysis

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

Service Tab

Service Date From/To

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

Supplier From/To

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

Master Supplier From/To

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

Location

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

Service Status

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

Service Type

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

Results Tab

Selected check boxes

Bookings can be individually selected.

Selected/Found Fields

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

Select All/Unselect All

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Bulk Service Insert (PCM), see ["Booking Operations" on page 226](#).

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

Service Line Insert**All Service Types**

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

Day/Seq.

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

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

Service Date

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

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

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

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

Once a product is selected, the SCU gets a label, which comes from the Second Charge Unit description in the Product Database.

For example, the supplier **SCEN01 - Johnstons Scenic Coachlines**, out of **AKL - Auckland** has two product offerings; a charter service and an intercity service. These are found in the Product Database via *Home > Products > Product Setup (Price Rules tab)*.

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

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

NOTE:

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

Country

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

Destination

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

Location

The location where the service takes place or originates.

Supplier

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

Code

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

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

Price Code (+ to expand)

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

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

The remaining selections are:

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

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

Insert Service Line Results

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

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

Filter Button

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

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

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

Search Icon

There is a search icon located next to the column 'Book' heading. This allows users to quickly search the Product Search application for an existing entry. An additional search field will enable users to insert text to

search, and previous and next (arrow buttons) identify entries which match the search criteria.



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

Insert

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

Location Name

Full name of the location where the service is provided.

Service Name

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

Name

Full name of the service supplier.

Description

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

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

INFORMATION				RATES	ALLOCATION	NOTES
FYI						
MESSAGE	VALID FROM	EXPIRES	PUBLIC			
RWC rates may apply - see RWC terms & conditi...	02-Sep-2025	31-Oct-2025				

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



"Booked" is not Saved

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

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

Summary

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

Summary Modal displays three tabs:

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

Save Bulk Service Insert Filters

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

Bulk Service Insert

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

2. Click **Manual**.

MANUAL

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

View "[About Bulk Service Insert Fields](#)" on page 199 to learn more about all field selections available, or view the individual tab filters; "[PCM Tab](#)" on page 199, "[Analysis Tab](#)" on page 200 (Booking), "[Service Tab](#)" on page 200, or "[Results Tab](#)" on page 200.

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.

SAVE FILTER

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

DESCRIPTION	Manual Selection

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

ADD

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

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



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

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

Copy Bulk Service Insert Filters

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

Bulk Service Insert - Date Entered From

COPY FILTER
SAVE FILTER
DELETE
EXIT
INSERT

BOOKING
ANALYSIS
SERVICE
RESULTS

Deletion of Bulk Service Insert Filters

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

Bulk Service Insert - Date Entered From

COPY FILTER
SAVE FILTER
DELETE
EXIT
INSERT

BOOKING
ANALYSIS
SERVICE
RESULTS

Booking Status Update

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

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

Bulk Update Booking Status

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

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

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

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

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

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

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

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

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

9. To keep the changes, click **Yes**.
10. Click **Exit** to discard any changes.
11. If '**Yes**' was selected a Summary will appear with the number of **Successful** Bookings to be updated.

Summary OK				
SUCCESSFUL (8)		ERRORS ENCOUNTERED (0)		
BOOKING NAME	REFERENCE	STATUS	CONSULTANT	TRAVEL DATE
P:Best of New Zealand - 10 Day Coach	NZSE104548	Deposit Invoice	GRB	23-Nov-2024

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

About Booking Status Update Fields

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Consultant

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

Booking Type

Group Bookings are pre-selected here as the feature is available to update Group Bookings in bulk.

Booking Ref

Used to select a specific Booking Reference.

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking & Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

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

Results Tab

Selected check boxes

Bookings can be individually selected.

Select All/Unselect All

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

Selected

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

Found

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

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

Summary

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

Summary Modal displays two tabs:

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

Book On

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

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

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

» Copy In Package

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

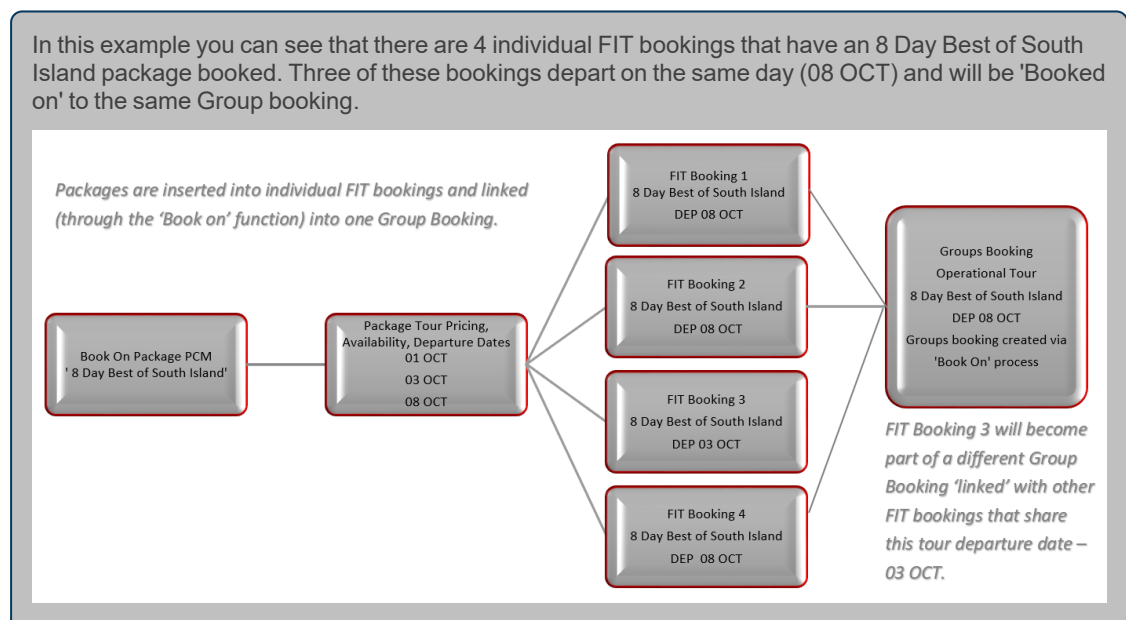
The operation of FIT Packages is detailed in the [FITs User Manual](#) within the chapter Create New FIT Bookings > Package Insert.

» Book On Package

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

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

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





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

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

Book On

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

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

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

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

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

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

PACKAGE NAME	MASTER GROUP	ALLOCATION DATE	MAX	USED	UNUSED	UTILISATION	STATUS
☒ 8 Day S.I. Highlights (Coach)		08-Oct-2025	36	0	36	0.00%	Link R
☐ 8 Day S.I. Highlights (Coach)		10-Oct-2025	36	0	36	0.00%	Link R
☐ 8 Day S.I. Highlights (Coach)		12-Oct-2025	36	0	36	0.00%	Link R
☐ 8 Day S.I. Highlights (Coach)		13-Oct-2025	36	0	36	0.00%	Link R
☐ 8 Day S.I. Highlights (Coach)		15-Oct-2025	36	0	36	0.00%	Link R

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

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

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

7. Click **OK** to keep the changes and save or update the entry.
8. Click **Exit** to discard any changes.
9. If **OK** was selected a Summary will appear with the number of successful packages to be updated.
- Click **OK** to keep the changes and save or update the entry.
10. The **Book On Results** screen will re-display, the package will have updated the status to 'Linked' select '**Exit**' to close.

About Book On Fields

Filter Tab

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

Package Name

The name of the PCM that constitutes the package.

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

Service

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

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

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

Booking Filter

Departures From/To

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

Link Status

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

Utilisation Level

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

Hide Unused Entries

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

Results Tab

Selected check boxes

Packages can be individually selected.

Select All/Unselect All

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

Process Package

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

Booking Filter

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

Link Status

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

Utilisation Level

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

Hide Unused Entries

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

Found

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

Selected

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Book On, see ["Booking Operations" on page 226](#).

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

About Book On Detail

Source Bookings Status Section

Statuses

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

Target Booking Section

Booking Status

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

Consultant

The Consultant detail to be attached to the Groups booking.

Branch

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

Department

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

Generate Rooming List

This checkbox is only available if:

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

Generate Report

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

Recalculate Service Line Prices

Click the recalculation option required.

Book On Report

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

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

Searching Book On Packages by Link Status

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

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

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

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

3. Select the **Link Status**.

4. Check the **completed screens**.

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

PRINT

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

DOWNLOAD CSV

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

DOWNLOAD PDF

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

VIEW

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

Book On Packages Report

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

Report Parameters

Order By: Departure Date, Package Name
Report Bookings: No
Package Name:
Option Code: CHCPK0000018DYSIG
Departure Date From: 01-Oct-2025
Departure Date To: 08-Oct-2025
Status: LinkRequired
Utilisation Level: 0
Hide Unused Entries: No

iCom Activity

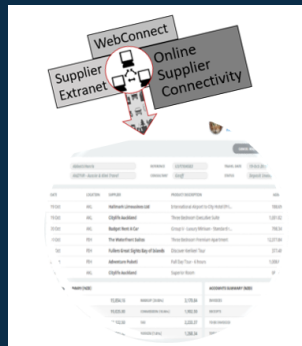
If user organisations are using iCom, booking activity can be monitored and bookings can be actioned. Filters are selected and a list of bookings will show the action of the booking or modified via any of the Internet Add-Ons over a selected date/time range. Bookings can be searched for using filters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

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

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



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



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

iCom Activity Report

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

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

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

Booking Tab

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

iCom Activity

[EXIT](#)
[ACTION BOOKINGS](#)
[SEARCH](#)

BOOKING

ANALYSIS

RESULTS

ICOM ACTIVITY FROM 14-Oct-2024 ICOM ACTIVITY TO 14-Oct-2024 ACTION STATUS Not Actioned ERROR STATUS ACTIVITY TYPE TRAVEL DATE FROM TRAVEL DATE TO LAST SERVICE DATE FROM LAST SERVICE DATE TO 	BOOKING NAME BOOKING REF FROM BOOKING REF TO CURRENCY CONSULTANT AGENT FROM AGENT TO MASTER AGENT FROM MASTER AGENT TO
---	--

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

Analysis Tab

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

iCom Activity

EXIT

ACTION BOOKINGS

SEARCH

BOOKING

ANALYSIS

RESULTS

+ BOOKING TYPE	▼	PAX NATIONALITY	▼	SOURCE	▼
+ MARKUP M/A	▼	DOC'S STATUS	▼	REASON REFUSED	▼
+ AGENT TYPE	▼	REGION	▼	PAYMENT TERMS	▼
+ CONSORTIUM	▼	RATE GROUP	▼	SALES REP	▼

3. Check the **completed screens**.
4. Click on the **Results Tab**. Select the bookings using the *Check-boxes* next to each booking, or use *Select All*. Click on the link provided to learn more about the [Results Tab](#).

iCom Activity

EXIT

ACTION BOOKINGS

SEARCH

BOOKING

ANALYSIS

RESULTS

☐	TRAVEL DATE	BOOKING NAME	BOOKING REF	AGENT	ACTIVITIES	ERRORS	LAST ACTIVITY
☒	01-Jul-2025	McCall Mr P & Mrs K	OLF1104696	ATCJAI	4	0	14-Oct-2024 C
☐	01-Oct-2025	Walsh Mr L & Mrs A	OLF1104697	BTTTRT	6	0	14-Oct-2024 C
☐	07-Oct-2025	Green Mr B & Mrs P	OLF1104698	CWTGRE	6	0	14-Oct-2024 C

SELECT ALL

UNSELECT ALL

ACTIVITY DETAILS (NOT ACTIONED)

☒ SELECT BOOKING

OPEN THIS BOOKING

ACTION	DETAIL
NewBooking	New Booking QU
AddService	Add Service 1/5
AddService	Add Service 1/10
AddService	Add Service 2/10

- If selected bookings are to be actioned, click **Action Bookings**. Click on the link to view [Action Bookings](#) Settings.

ACTION BOOKINGS

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

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

Action Bookings EXIT SAVE

☒ **MARK AS ACTIONED**

☒ **UPDATE BOOKING**

CONSULTANT ▼

BOOKING STATUS ▼

☐ **QUEUE MESSAGE**

QUEUE DEFAULTS

QUEUE TO ▼

ASSIGNED TO ▼

DUE DATE TIME 17-Oct-2022 00:00

BOOKING NAME McCall Mr P & Mrs K

MESSAGE

New Booking QU
Add Service 1/5
Add Service 1/10
Add Service 2/10

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

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

About iCom Activity Booking Fields

Booking Tab

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

iCom Activity (Date) From/To

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

iCom Activity (Time) From/To

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

Action Status

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

- » Actioned
- » All
- » Not Actioned (defaulted)

Error Status

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

- » All
- » Error
- » No Error

Activity Type

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

- » Add Service
- » Agent Advice

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

Travel Date From/To

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

Last Service Date From/To

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

Booking Name

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

Booking Reference From/To

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

Currency

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

Consultant

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

Agent From/To

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

Master Agent From/To

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

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

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

Results Tab

Selected check boxes

Bookings can be individually selected.

Select All/Unselect All

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

Select Bookings

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

Open this Booking

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

Action and Detail

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in iCOM Activity, see ["Booking Operations" on page 226](#).

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

About Action Bookings Settings

Mark as Actioned

Selection.

Update Bookings

Booking information can be updated:

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

Queue Messages

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

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

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

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

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

Email Management

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



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

Inbox

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

From the Email Management Inbox, Admin staff can:

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

View Email

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

- » ["Assign Email to Existing Booking" on the facing page](#)
- » ["Assign Email to New Booking" on page 111](#)
- » ["Unassign Email from Booking" on page 113](#)
- » ["Forwarding an Email" on page 114](#)

View an Email Message

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

+ EMAIL FILTER

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

STATUS	RECEIVED	FROM	SUBJECT	AGENT EMAIL
☐ Assigned	08-Aug-2024	accounts@goodagent.com	Re: Booking Confirmation - NZF11050...	UNASSIGN ASSIGN VIEW
☐ Unassigned	08-Aug-2024	accounts@goodagent.com	Re: NZF1105021 / Mail Mr E	EMAIL ACCOUNT Agent Email
☐ Assigned	08-Aug-2024	accounts@limos.com	Re: Supplier Request - NZF1105021 / ...	FROM accounts@goodagent.com
				TO agent@email.com
				RECEIVED 08-Aug-2024 21:32:34
				AGENT AGALAX - A Good Agent
				BOOKING NZF1105021 - Mail Mr E

4. Click **Exit** to close.

EXIT

Assign Emails

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

There are two procedures for assigning an email:

[Assign to an Existing Booking](#)

[Assign to a New Booking](#)

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

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

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

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

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

Assign Email to Existing Booking

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

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

+ EMAIL FILTER

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

☐	RECEIVED	FROM	SUBJECT	EMAIL ACCOUNT	STATUS
☐	05-Mar-2025 13:25:32	reservations@limos.com	Re: Supplier Request - NZF104...	Supplier Email	Unassigned
☐	05-Mar-2025 13:18:51	reservations@limos.com	Re: Supplier Request - NZF104...	Supplier Email	Unassigned
☐	04-Mar-2025 16:52:51	accounts@goodagent.com	New Booking Request for Pete...	Agent Email	Unassigned
☐	09-Aug-2024 11:36:29	accounts@limos.com	Re: Supplier Request - NZF105...	Supplier Email	Unassigned
☒	09-Aug-2024 11:32:39	accounts@goodagent.com	Re: NZF105021 / Mail Mr E	Agent Email	Unassigned

GENERAL

FORWARD UNASSIGN **VIEW**

EMAIL ACCOUNT *Agent Email*

FROM *accounts@goodagent.com*

TO *agent@email.com*

RECEIVED *09-Aug-2024 11:32:39*

BOOKING

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

Email CREATE NEW BOOKING MOVE TO TRASH FORWARD UNASSIGN EXIT SAVE

EMAIL TYPE **Booking Agent**

EMAIL ACCOUNT **Booking**

FROM **Booking Agent**

TO **Booking Supplier**

RECEIVED **General**

BOOKING **General Agent**

AGENT **General Supplier**

SUPPLIER

SUBJECT **Re: NZFI105021 / Mail Mr E**

MESSAGE

Hello

Payment processed, please forward vouchers.

Regards

Sally

August 9, 2024 11:30 AM, messaging@example.test
(mailto:messaging@example.test) wrote:
BOOKING INVOICE
BILLED TO:

- Enter the Booking Name (if known) and click the corresponding **Search** icon. Or,
- Use the full Booking Search, select the **Search** icon, to open the **Booking Search** screen.

Booking Search CLEAR EXIT SEARCH

BOOKING PAX/SERVICE ANALYSIS RESULTS

BOOKING FILTERS

NAME STARTS WITH

NAME CONTAINS

BOOKING REF FROM

BOOKING REF TO

CONSULTANT

TRAVEL DATE FROM **01-Jan-2024**

TRAVEL DATE TO **14-Mar-2027**

DATE ENTERED FROM **13-Jun-2023**

DATE ENTERED TO **14-Mar-2027**

AGENT

AGENT REFERENCE

BOOKING CURRENCY

QUOTE VALIDITY

USER DEFINED TEXT 2

USER DEFINED TEXT 3

USER DEFINED TEXT 4

USER DEFINED TEXT 5

BOOKING STATUS

ALL

CANCELLED

CANCELLED WITH COST

CONFIRMED

DEPOSIT INVOICE

FINALISED

INVOICED

QUOTATION

BRANCH

ALL

ADMINISTRATION

AUSTRALIAN OFFICE

BALANCE SHEET

NZ OFFICE

ONLINE SALES

UNASSIGNED

USA OFFICE

DEPARTMENT

ALL

ADMINISTRATION

COASTAL EXCURSIONS

FIT

GROUPS

INCENTIVES

INTERNET FIT

SERIES TOURS

SHORE EXCURSIONS

SPECIAL GROUPS

UNASSIGNED

- Click **Search**.
- The **Results** screen opens, click the Booking you want to Assign the email to.

Booking Search CLEAR EXIT SEARCH

BOOKING	REFERENCE	TRAVEL DATE	ENTERED	AGENT	CURRENCY	CONSULTANT	STATUS	AGENT REF.
Mail Mr E	NZF1105021	19-Oct-2024	08-Aug-2024	AGALAX	NZD	PNJ	Confirmed	

d.

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

Email

CREATE NEW BOOKING

MOVE TO TRASH

FORWARD

UNASSIGN

EXIT

SAVE

EMAIL TYPE

Booking Agent

EMAIL ACCOUNT

Agent Email

FROM

accounts@goodagent.com

TO

agent@email.com

RECEIVED

09-Aug-2024 11:32:39

BOOKING

NZFI105021 - Mail Mr E

AGENT

AGALAX - A Good Agent

SUPPLIER

SUBJECT

Re: NZFI105021 / Mail Mr E

MESSAGE

Hello

Payment processed, please forward vouchers.

Regards

Sally

August 9, 2024 11:30 AM, messaging@example.test (mailto:messaging@example.test) wrote:

BOOKING INVOICE

BILLED TO:

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

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

☐	RECEIVED	FROM	SUBJECT	EMAIL ACCOUNT	STATUS
☐	04-Mar-2025 16:52:51	accounts@goodagent.com	New Booking Request for Pet...	Agent Email	Unassigned
☐	04-Mar-2025 16:49:12	accounts@goodagent.com	Re: Booking Confirmation - N...	Agent Email	Assigned
☐	09-Aug-2024 13:27:18	accounts@goodagent.com	New booking request Mr & Mr...	Agent Email	Assigned
☐	09-Aug-2024 11:36:29	accounts@limos.com	Re: Supplier Request - NZFI10...	Supplier Email	Unassigned
☒	09-Aug-2024 11:32:39	accounts@goodagent.com	Re: NZFI105021 / Mail Mr E	Agent Email	Assigned
☐	09-Aug-2024 09:32:34	accounts@goodagent.com	Re: Booking Confirmation - N...	Agent Email	Assigned

BOOKING AGENT

FORWARD

UNASSIGN

VIEW

EMAIL ACCOUNT

Agent Email

FROM

accounts@goodagent.com

TO

agent@email.com

RECEIVED

09-Aug-2024 11:32:39

AGENT

AGALAX - A Good Agent

BOOKING

NZFI105021 - Mail Mr E

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

Assign Email to New Booking

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

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

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

+ EMAIL FILTER

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

☐	RECEIVED	FROM	SUBJECT	EMAIL ACCOUNT	STATUS
☐	05-Mar-2025 13:25:32	reservations@limos.com	Re: Supplier Request - NZFI104...	Supplier Email	Unassigned
☐	05-Mar-2025 13:18:51	reservations@limos.com	Re: Supplier Request - NZFI104...	Supplier Email	Unassigned
☐	04-Mar-2025 16:52:51	accounts@goodagent.com	New Booking Request for Pete...	Agent Email	Unassigned
☐	09-Aug-2024 11:36:29	accounts@limos.com	Re: Supplier Request - NZFI105...	Supplier Email	Unassigned
☒	09-Aug-2024 11:32:39	accounts@goodagent.com	Re: NZFI105021 / Mail Mr E	Agent Email	Unassigned

GENERAL
FORWARD **UNASSIGN** **VIEW**
 EMAIL ACCOUNT *Agent Email*
 FROM *accounts@goodagent.com*
 TO *agent@email.com*
 RECEIVED *09-Aug-2024 11:32:39*
 BOOKING

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

Email
CREATE NEW BOOKING **MOVE TO TRASH** **FORWARD** **UNASSIGN** **EXIT** **SAVE**

EMAIL TYPE *Booking*

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

CREATE NEW BOOKING

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

Create Booking
EXIT **SAVE**

BOOKING TYPE
☒ FIT ☐ GROUP

NAME		CURRENCY	
NAME ALIAS		CURRENCY SUBCODE	<i>Standard</i>
TRAVEL DATE		BRANCH	
AGENT		DEPARTMENT	
BOOKING STATUS	<i>QU - Quotation</i>	BOOKING REF	<i>105022</i>

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

Email
CREATE NEW BOOKING **MOVE TO TRASH** **FORWARD** **UNASSIGN** **EXIT** **SAVE**

EMAIL TYPE *Booking*
 EMAIL ACCOUNT *Agent Email*
 FROM *accounts@goodagent.com*
 TO *agent@email.com*
 RECEIVED *09-Aug-2024 13:27:18*
 BOOKING *NZFI105022 - Smith Mr & Mrs*
 AGENT
 SUPPLIER
 SUBJECT *New booking request Mr & Mrs Smith*

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

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

+ EMAIL FILTER			
☐	STATUS	RECEIVED	FROM
☐	Assigned	08-Aug-2024	accounts@goodagent.com
☐	Assigned	08-Aug-2024	accounts@goodagent.com
☐	Unassigned	08-Aug-2024	accounts@limos.com
☒	Assigned	09-Aug-2024	accounts@goodagent.com

AGENT EMAIL
UNASSIGN **ASSIGN** **VIEW**
 EMAIL ACCOUNT *Agent Email*
 FROM *accounts@goodagent.com*
 TO *agent@email.com*
 RECEIVED *09-Aug-2024 01:27:18*
 AGENT *AGALAX - A Good Agent*
 BOOKING *NZFI105022 - Smith Mr & Mrs*

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

Unassign Emails

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

Unassign Email from Booking

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

+ EMAIL FILTER

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

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

☐	STATUS	RECEIVED	FROM	SUBJECT
☐	Assigned	08-Aug-2024	accounts@goodagent.com	Re: Booking Confirmation - NZF1050...
☒	Assigned	08-Aug-2024	accounts@goodagent.com	Re: NZF105021 / Mail Mr E
☐	Assigned	08-Aug-2024	accounts@limos.com	Re: Supplier Request - NZF105021 / ...
☐	Assigned	09-Aug-2024	accounts@goodagent.com	New booking request Mr & Mrs Smith

AGENT EMAIL

 EMAIL ACCOUNT Agent Email
 FROM accounts@goodagent.com
 TO agent@email.com
 RECEIVED 08-Aug-2024 23:32:39
 AGENT AGALAX - A Good Agent
 BOOKING NZF105021 - Mail Mr E

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

- A confirmation dialog displays. *Unassigning this email will remove it from any Booking/Supplier/Agent*, select **Yes** to confirm, or **No** to return to the Inbox.
- If **Yes** is selected, the email re-displays in the Inbox with an **Unassigned** status.

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

☐	STATUS	RECEIVED	FROM	SUBJECT
☐	Assigned	08-Aug-2024	accounts@goodagent.com	Re: Booking Confirmation - NZF1050...
☒	Unassigned	08-Aug-2024	accounts@goodagent.com	Re: NZF105021 / Mail Mr E
☐	Assigned	08-Aug-2024	accounts@limos.com	Re: Supplier Request - NZF105021 / ...
☐	Assigned	09-Aug-2024	accounts@goodagent.com	New booking request Mr & Mrs Smith

AGENT EMAIL

 EMAIL ACCOUNT Agent Email
 FROM accounts@goodagent.com
 TO agent@email.com
 RECEIVED 08-Aug-2024 23:32:39
 AGENT AGALAX - A Good Agent
 BOOKING

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

Move Emails to Trash

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

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

+ EMAIL FILTER

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

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

The screenshot shows the 'EMAIL FILTER' interface. At the top right is a green 'MOVE TO TRASH' button. Below it is a table with columns: STATUS, RECEIVED, FROM, and SUBJECT. The table contains five rows of email data. The first row is 'Assigned' with subject 'Re: Booking Confirmation - NZF1105...'. The second row is 'Unassigned' with subject 'Re: NZF1105021 / Mail Mr E'. The third row is 'Assigned' with subject 'Re: Supplier Request - NZF1105021 / ...'. The fourth row is 'Assigned' with subject 'New booking request Mr & Mrs Smith'. The fifth row is 'Unassigned' with subject 'Email Reply Test' and is highlighted in blue. To the right of the table is a 'SUPPLIER EMAIL' section with buttons for 'UNASSIGN', 'ASSIGN', and 'VIEW', and fields for 'EMAIL ACCOUNT', 'FROM', 'TO', 'RECEIVED', and 'SUPPLIER'.

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

The screenshot shows the 'EMAIL FILTER' interface. The table has columns: STATUS, RECEIVED, FROM, SUBJECT, and EMAIL ACCOUNT. The first row is 'Unassigned' with subject 'Re: Supplier Request - NZF1104... Supplier Email'. The second row is 'Unassigned' with subject 'New Booking Request for Pete... Agent Email'. The third row is 'Unassigned' with subject 'Re: Supplier Request - NZF1105... Supplier Email' and is highlighted in blue. To the right of the table is a 'GENERAL' section with buttons for 'FORWARD', 'UNASSIGN', and 'VIEW', and fields for 'EMAIL ACCOUNT', 'FROM', 'TO', 'RECEIVED', and 'BOOKING'.

i. Select **Move To Trash**.

The screenshot shows the 'Email' view interface. At the top is a toolbar with buttons: 'CREATE NEW BOOKING', 'MOVE TO TRASH' (highlighted), 'FORWARD', 'UNASSIGN', 'EXIT', and 'SAVE'. Below the toolbar is a form with fields for 'EMAIL TYPE', 'EMAIL ACCOUNT', 'FROM', 'TO', 'RECEIVED', 'BOOKING', 'AGENT', 'SUPPLIER', 'SUBJECT', and 'MESSAGE'. The 'EMAIL TYPE' is set to 'General'. The 'EMAIL ACCOUNT' is 'Supplier Email'. The 'FROM' is 'accounts@limos.com'. The 'TO' is 'supplier@email.com'. The 'RECEIVED' is '09-Aug-2024 11:36:29'. The 'SUBJECT' is 'Re: Supplier Request - NZF1105021 / Mail Mr E'. The 'MESSAGE' field contains the following text: 'Hi Naomi, The service is confirmed for 19th October. Please provide arrival details for Mail Mr E to be met on arrival. Kind regards, Reservations, August 9, 2024 11:33 AM, supplier@email.com (mailto:supplier@email.com) wrote: For the Attention of: Please find attached booking request for Mail Mr E.'

4. The emails are moved to Trash.

Forwarding an Email

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

Forward an Email

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

+ EMAIL FILTER

3. Highlight the Email and select **Forward**.

☐	STATUS	RECEIVED	FROM	SUBJECT
☐	Unassigned	05-Mar-2025 16:33:43	accounts@agoodagentny.com	Re:
☐	Unknown	05-Mar-2025 13:50:35	accounts@agoodagentny.com	New booking request for Jones Famil...
☐	Unknown	05-Mar-2025 13:14:01	accounts@limos.com	Re: Supplier Request - NZFI104691 / ...
☒	Unassigned	05-Mar-2025 11:47:14	accounts@agoodagentny.com	Re: Booking Confirmation - NZFI1046...
☐	Unassigned	05-Mar-2025 11:46:56	accounts@agoodagentny.com	Re: Booking Confirmation - NZFI1046...

GENERAL AGENT
FORWARD **UNASSIGN** **VIEW**
EMAIL ACCOUNT *Reservations Email*
FROM *accounts@agoodagentny.com*
TO *reservations@emaildomain.cc*
RECEIVED *05-Mar-2025 11:47:14*
AGENT *AGANYC - A Good New York Ag*
BOOKING

4. In the **Note field**, insert a message to the email recipient, by default the Move to Trash checkbox is ticked, to keep the email deselect the checkbox.

Email
EXIT SEND

FORWARD TO

NOTE

MOVE TO TRASH ☒

5. A confirmation dialog displays. *Forwarding this email will remove it from any Booking/Supplier/Agent Select* **Yes** to confirm, or **No** to return to the Inbox.
6. The email is received in the **recipients email account**, the recipient can view the contents of the original email, by clicking the ellipsis.

FWD: Re: Booking Confirmation - NZFI104691 / Danson Mr T & Mrs K
reservations@emaildomain.com (March 7, 2025 9:20 AM)
↩

To: "Operations Manager" <manager@emaildomain.com>

Please investigate this email as we received a duplicate booking from the agent.

...

From: accounts@agoodagentny.com
To: reservations@emaildomain.com
Date: 05-Mar-2025 11:47:14
Subject: Re: Booking Confirmation - NZFI104691 / Danson Mr T & Mrs K

Thanks for your revised email, will update the client >

March 5, 2025 11:41 AM, reservations@emaildomain.com (reservations@emaildomain.com) wrote:>
For the Attention of:>

Please find attached confirmation advice for Danson Mr T & Mrs K.>

Best regards>

About Email Management Fields

Email Filter

Emails can be viewed and updated in bulk by selecting the required filters. Below are the filter selections available when using the Email Management feature. This provides a convenient solution to processing unassigned emails or moving received emails to the Trash menu.

Email Account

This selection filters emails by an available email account.

Date From & To

The date the email was imported into Tourplan. If selection for a range of dates is entered, Emails that fall within the date range provided will be display in the Email list.

Agent

When a specific Agent is selected, a list of emails is returned for that Agent only.

Supplier

When a specific Supplier is selected, a list of emails is returned for that Supplier only.

Booking Ref

When a booking reference is defined, a list of emails is returned for that booking only.

Email Type

Filters by Email Type can be applied, the Email Type options are as follows:

- » **All** - All Emails
- » **Booking Agent** - Booking and Agent
- » **Booking Supplier** - Booking and Supplier
- » **Agent Email** - Agent Emails Only
- » **Supplier Email** - Supplier Emails Only
- » **General** - Not linked to an Agent, Supplier or Booking

Email Status

By default, Error and Unassigned are selected however these can be changed by clicking on the required check boxes.

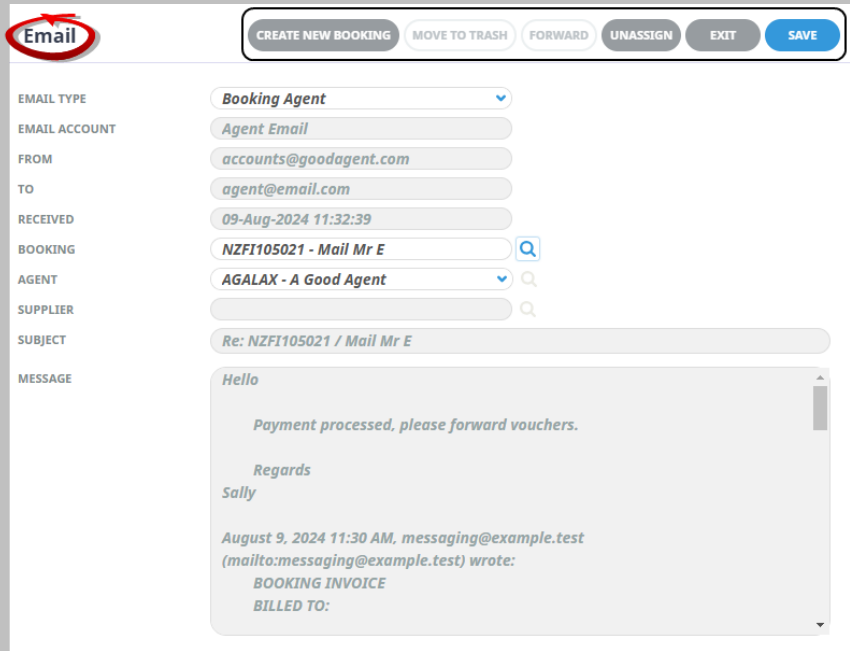
- » **All** - displays all emails
- » **Assigned** - displays assigned emails
- » **Error** - displays error emails
- » **Unassigned** - displays unassigned emails

One or more selections is required to filter the email list.

About View Email Fields

Administrators view the content of the email message by highlighting an email in the list and selecting 'View'. From here emails can be assigned to bookings, agents, and/or suppliers. Emails can also be forwarded elsewhere or moved as unwanted emails to the Trash bin.

From the Email 'View' screen.



The screenshot shows the 'Email' view interface. At the top, there's a header with the word 'Email' in a red circle and a row of buttons: 'CREATE NEW BOOKING', 'MOVE TO TRASH', 'FORWARD', 'UNASSIGN', 'EXIT', and 'SAVE'. Below this is a list of email fields with their corresponding values:

- EMAIL TYPE: Booking Agent
- EMAIL ACCOUNT: Agent Email
- FROM: accounts@goodagent.com
- TO: agent@email.com
- RECEIVED: 09-Aug-2024 11:32:39
- BOOKING: NZFI105021 - Mail Mr E
- AGENT: AGALAX - A Good Agent
- SUPPLIER: (empty)
- SUBJECT: Re: NZFI105021 / Mail Mr E
- MESSAGE: Hello

Payment processed, please forward vouchers.

Regards
Sally

August 9, 2024 11:30 AM, messaging@example.test (mailto:messaging@example.test) wrote:
BOOKING INVOICE
BILLED TO:

Buttons

Create New Booking - New Bookings can be created.

Move to Trash - Email messages can be moved to Trash.

Forward - Email messages can be forwarded to an external email account.

Unassign - Assigned email messages can be unassigned from the Booking, Agent or Supplier.

Exit - Closes the Email view.

Save - Saves the changes.

Email Type

The email type selected enables different field selections and search functions.

- » **Booking** - Enables the Booking field, allowing users to search for the required booking to assign the email to
- » **Booking Agent** - Enables the Booking field, allowing users to search for the required booking to assign the email to. The Agent field populates from the attached booking agent.
- » **Booking Supplier** - Enables the Booking field, allowing users to search for the required booking to assign the email to. The Supplier field populates a dropdown list of suppliers from the attached booking.
- » **General** - Provides the ability to move the email to the Trash bin.
- » **Agent Email** - Enables the Agent field, allowing users to search for the required debtor to assign the email to.
- » **Supplier Email** - Enables the Supplier field, allowing users to search for the required creditor to assign the email to.

About Forward Email Fields

Email

EXIT SEND

FORWARD TO

NOTE

MOVE TO TRASH

EMAIL ACCOUNT

FROM

TO

RECEIVED

BOOKING

AGENT

SUPPLIER

SUBJECT

MESSAGE

Reservations Email

accounts@agoodagentny.com

reservations@emaildomain.com

05-Mar-2025 11:47:14

AGANYC - A Good New York Agent

Re: Booking Confirmation - NZFI104691 / Danson Mr T & Mrs K

Thanks for your revised email, will update the client

March 5, 2025 11:41 AM, reservations@emaildomain.com

(mailto:reservations@emaildomain.com) wrote:

For the Attention of:

Please find attached confirmation advice for Danson Mr T & Mrs K.

Forward To - A dropdown selection of available email address to forward to.

NOTE: A list of approved email accounts to forward emails to are pre-defined in the Code Setup, Email Account configuration. If no email accounts are listed, the Forward To dropdown in Email Management will be empty. For more information on the setup see [Insert Button \(Forward Email\)](#)

Note - A free format field to enter a message to the recipient of the forwarded email.

Move to Trash - By default this checkbox is selected, allowing simultaneous forwarding of the email and moving the email to the trash bin. Users can deselect to keep the email in the Inbox.

Remaining Fields - The content of the original email is visible onscreen as read only.

Replying to Emails

Imported emails are replied to from within the Documentation page of the Booking, Agent or Supplier.



Administrators cannot reply to emails from the Email Management page.

Consultants View - Open Booking

1. Open **FITs**, search for the Booking. The received (now assigned) email displays when **Operations & Accounts > Documentation** Menu is selected.

DATE	MESSAGE	STATUS	SENT TO	SENT BY	TYPE	DESTINATION
09-Aug-2024 11:15:...		Received			Email	
09-Aug-2024 11:32:...		Received		accounts@gooda...	Booking Agent	
09-Aug-2024 09:32:...		Received		accounts@gooda...	Booking Agent	

BOOKING AGENT

REPLY **RESEND**

AGENT: AGALAX - A Good Agent

CREATED ON: 09-Aug-2024 11:52:43

MARK AS UNREAD: ☒

SENT VIA: Email

SENT BY: accounts@goodagent.com

SENT TO: agent@email.com

SENT ON: 09-Aug-2024 11:32:39

2. From the booking, Consultants can **Reply**, **Generate a New Message** or mark the Email as **Unread**.

DATE	MESSAGE	STATUS	SENT TO	SENT BY	TYPE	DESTINATION
09-Aug-2024 11:15:...		Received			Email	
09-Aug-2024 11:32:...		Received		accounts@gooda...	Booking Agent	
09-Aug-2024 09:32:...		Received		accounts@gooda...	Booking Agent	

BOOKING AGENT

REPLY **RESEND**

AGENT: AGALAX - A Good Agent

CREATED ON: 09-Aug-2024 11:52:43

MARK AS UNREAD: ☒

SENT VIA: Email

SENT BY: accounts@goodagent.com

SENT TO: agent@email.com

SENT ON: 09-Aug-2024 11:32:39

NOTE: Agent or Supplier emails are available from the Documentation menu when in the Debtor or Creditor applications.

Trash

Imported emails are not deleted in Tourplan they are moved from the Inbox to a Trash menu. They appear in the Trash list where the email content can be viewed, or the email can be restored back into the Inbox.

View an email in Trash

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

+ EMAIL FILTER

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

☐	RECEIVED	FROM	SUBJECT	EMAIL ACCOUNT	
☐	05-Mar-2025 13:18:51	reservations@limos.com	Re: Supplier Request - NZF1104691 ...	Supplier Email	
☒	29-Jul-2024 14:07:47	accounts@limos.com	Re: Supplier Request - NZF1105019 ...	Supplier Email	
☐	29-Jul-2024 12:14:03	reservations@limos.com	Re: Supplier Request - NZF1105019 ...	Supplier Email	
☐	29-Jul-2024 09:39:55	accounts@limos.com	Re: Supplier Request - NZF1105019 ...	Supplier Email	

BOOKING SUPPLIER

 EMAIL ACCOUNT
 FROM
 TO
 RECEIVED
 BOOKING

4. Click **Exit** to close.

EXIT

Restore email back to the Inbox

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

+ EMAIL FILTER

3. Check the box next to the Email(s) and select **Restore**.

					RESTORE
+ EMAIL FILTER					
☐	RECEIVED	FROM	SUBJECT	EMAIL ACCOUNT	
☒	05-Mar-2025 13:18:51	reservations@limos.com	Re: Supplier Request - NZF1104691 /...	Supplier Email	
☒	29-Jul-2024 14:07:47	accounts@limos.com	Re: Supplier Request - NZF1105019 /...	Supplier Email	
☒	29-Jul-2024 12:14:03	reservations@limos.com	Re: Supplier Request - NZF1105019 /...	Supplier Email	
☐	29-Jul-2024 09:39:55	accounts@limos.com	Re: Supplier Request - NZF1105019 /...	Supplier Email	

GENERAL

 EMAIL ACCOUNT
 FROM
 TO
 RECEIVED
 BOOKING

4. The emails are moved to the Inbox.

Queue Management

If user organisations are using internal messaging queues they can be monitored, actioned and printed using Queue Management functions. Filters are selected and a list of queues results will show for processing of tagged queues.

This function allows users to update the queue statuses and send the messages to the entity that owns the queued message. Queue management filters can also be saved so that repeatable tasks can be easily used.

Queue Management

1. From the Home menu, select **Home > Operations > Booking Operations > Queue Management**.
2. Click **Manual**.



3. On the blank **Queue Management - Manual Selection** screen, the **Queue Tab** will open, select the required filters from the field selections available within the **Queue Tab**. View [Queue Management Fields](#) to learn more about all the field selections available, or view the individual tab filters; [Queue Tab](#), [PCM Tab](#), [Analysis Tab](#) (PCM), [Booking Tab](#), [Analysis Tab](#) (Booking and Agent), [Service Tab](#), [Analysis Tab](#) (Supplier and Product) or [Results Tab](#).

NOTE: The Queue Scope field triggers the Tab selections available.

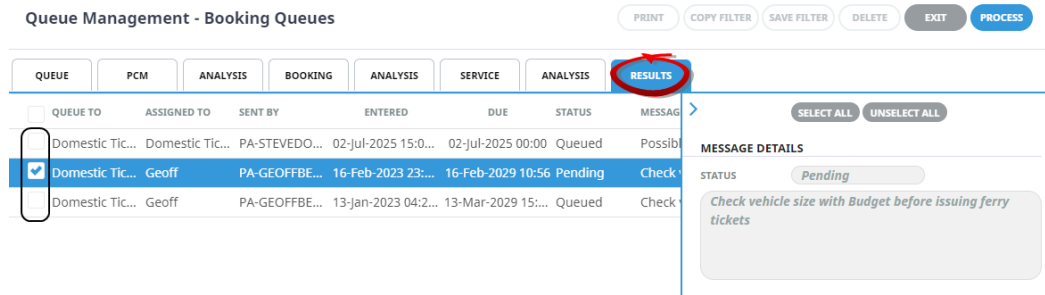
For example: Selecting a Queue Scope of Booking, will allow selections within the Booking and the (Booking) Analysis Tab.

The screenshot shows the 'Queue Management - Manual Selection' interface. The 'QUEUE' tab is selected and highlighted with a red circle. The 'QUEUE SCOPE' dropdown is set to 'Booking'. The 'RESULTS' tab is also visible. The 'QUEUE STATUS' section shows 'ALL', 'ARCHIVED', and 'QUEUED' (checked) options. The 'ACTIONED' and 'PENDING' options are also visible.

Where as selecting a Queue Scope of Supplier, will allow selections within the Supplier and the (Supplier) Analysis Tab.

The screenshot shows the 'Queue Management - Manual Selection' interface. The 'QUEUE' tab is selected and highlighted with a red circle. The 'QUEUE SCOPE' dropdown is set to 'Supplier'. The 'SUPPLIER' tab is selected. The 'QUEUE STATUS' section shows 'ALL', 'ARCHIVED', and 'QUEUED' (checked) options. The 'ACTIONED' and 'PENDING' options are also visible.

4. Check the **completed screens**.
5. Click on the **Results Tab**, Select the Queue Messages using the *Selected* check box next to each Queue Message, or use *Select All*.

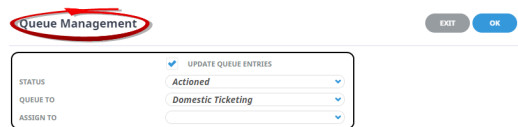


- Click **Process**.



- On the Queue Management screen, click **Update Queue Entries**. The status of the queues can be marked as; actioned, archived, pending or queued.

NOTE: A Queued Destination can be assigned to the queue to field or the queue can be assigned to a colleague.



- Click **OK** to keep the changes and save or update the entry.
- Click **Exit** to discard any changes.

About Queue Management Booking Fields

Queue Tab

This is the default tab that will open when selecting to insert a Manual Queue Management.

Queue Scope

This selection will trigger the availability of the filter tabs. Selection for one of the following can occur; either leave unassigned or select Booking, Booking Service Line, PCM, PCM Service Line, Agent, Supplier, User or General.

Queue Defaults

A pre-set queue destination may be available based on the Queue Scope selection. Selecting a queue default here will select all message queues using this default.

Due Date From/To

This is the date the Queue was due on. If selection for a range of dates is entered here Queues that fall within the date range provided will be display in the results screen.

Sent By

A specific colleague or user can be selected to return queues for this user.

Destination

A specific destination or group of user can be selected to return queues for this destination.

Assigned To

A specific colleague or user can be selected to return queues that are assigned to this user.

Queue Status

By default, Queued and Pending are selected however these can be changed by clicking on the required check boxes.

Booking Tab

The booking tab is triggered when Queue Scope selection is one of the following:

- » (Unassigned)
- » Booking
- » Booking Service Line
- » General

The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes selection for Booking Status, Branch and or Department.

Last Worked Date From/To

This is the date the booking was worked on. If selection for a range of dates is entered here Queue Messages for bookings that have a last worked date within the date range provided will be display in the results screen.

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Consultant

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

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

Service Tab

The service tab is triggered when Queue Scope selection is one of the following:

- » (Unassigned)
- » Booking Service Line
- » PCM Service Line
- » General

The top section includes 'Current Service' field selections and 'Booking Filter' selections. The bottom section includes check box selection for Service Status, Service (Type) and or Voucher Status.

Service Date From/To

This is the date of the service within a booking. If selection for a range of dates is entered here Queue Messages for services that fall within the date range provided will be display in the results screen.

Supplier From/To

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

Master Supplier From/To

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

Location

The Queue Message for a location code attached to the service.

Service Status

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

Service Type

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

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes. These are Supplier Analysis codes that can be attached to the Supplier.

Product Analysis

The bottom two rows of this tab are the 6 Product Analysis codes. These are service level selections.

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

Agent Tab

The agent tab is triggered when Queue Scope selection is:

- » Agent

Agent From/To

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

Master Agent From/To

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

Analysis Tab (Agent Analysis)

Agent Analysis

The rows of this tab are the 6 Agent Analysis codes.

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

PCM Tab

The PCM tab is triggered when Queue Scope selection is one of the following:

- » (Unassigned)
- » PCM
- » PCM Service Line
- » General

The top section includes 'PCM Header' field selections. The bottom section includes selection for PCM Statuses.

Name From

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

Name Contains

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

Agent

Used to select Queue Messages with a specific, agent code in the PCM header matching the selection.

Based Date From/To

This is the base date selected when the PCM was entered. If selection for a range of dates is entered here Queue Messages for PCM that fall within the date range provided will be display in the results screen.

Date Entered From/To

This is the date the PCM was entered. If selection for a range of dates is entered here Queue Messages for PCM that were created (or entered) within the date range provided will be display in the results screen.

PCM Status

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

Analysis Tab (PCM Analysis)

PCM Analysis

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

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

Results Tab

Selected check boxes

Queues can be individually selected.

Select All/Unselect All

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

Additional Message/Booking/PCM/Service Details

When a queue message is highlighted, additional details relating to that message will display on the right of the screen. Depending on the queue type the details sections may include:

- » Message Details
- » Booking Details
- » PCM Details
- » Service Details

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Queue Management, see ["Booking Operations" on page 226](#).

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

About Queue Management Settings

Update Queue Entries

Queue Management information can be updated.

Status

Selection from Actioned, Archived, Pending or Queued.

Queue To

Selection from all available queues (if Queue Groups have been setup).

Assign To

Selection from all available Tourplan users, filtered by the 'Queue To' selection (if used).

Open an Existing Queue

A list of Queue results can be obtained when searching for the Queue Default. Users can view results as to when the Queue was sent, to whom and the status of the queue from within the results screen. Queues can be printed or downloaded to a CSV or PDF file.

Find Queue Results

1. From the Home menu, select **Home > Operations > Booking Operations > Queue Management**.
2. A list of previously created Queue Descriptions will display, click on the Queue Description line.
3. Select the **Results Tab** to display a list of Queue Messages using the Queue Description.

QUEUE	PCM	ANALYSIS	BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
QUEUE TO	ASSIGNED TO	SENT BY	ENTERED	DUE	STATUS	MESSAGE	
☐ Domestic Tic...	Domestic Tic...	PA-STEVEDO...	02-Jul-2025 15:0...	02-Jul-2025 00:00	Queued	Possible roof maintenanc	SELECT ALL UNSELECT ALL
☐ Domestic Tic...	Dan Martin	PA-GEOFFBE...	16-Feb-2023 23:...	16-Feb-2029 10:56	Pending	Check vehicle size with Bu	MESSAGE DETAILS
☐ Domestic Tic...	Geoff	PA-GEOFFBE...	13-Jan-2023 04:2...	13-Mar-2029 15:...	Queued	Check vehicle size allocate	STATUS

Printing Queues

1. Open the Queue Description on Screen. (Follow Procedure 1 and 2 from Find Queue Results - Procedure above)
2. Users can print the list of queues on screen by selecting **Print**.

3. Further options are made available to:

Print - Queue Messages

- a. 'View' results from a report on screen.
 - b. 'Download CSV' file.
 - c. 'Download PDF' file.
4. Click **Exit** to discard any changes.

Save Queue Management Filters

Common or frequently used Queue Management Filters can be saved and given a Description so that repeatable tasks are easily accomplished.

Queue Management

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

2. Click **Manual**.



3. On the blank Queue Management - Manual Selection screen, the **Queue Tab** will open, select the required filters from the field selections available within the **Queue Tab**.

View [Queue Management Fields](#) to learn more about all the field selections available, or view the individual tab filters; [Queue Tab](#), [PCM Tab](#), [Analysis Tab](#) (PCM), [Booking Tab](#), [Analysis Tab](#) (Booking and Agent), [Service Tab](#), [Analysis Tab](#) (Supplier and Product) or [Results Tab](#)

NOTE: The Queue Scope field triggers the Tab selections available.

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



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



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



9. Click **Exit** to discard any changes.
10. **NOTE:** If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Queue Management. If selected for future Queue Management processing - results will be returned based on the saved filters.
11. If **Add** is selected you will return to the results screen, where you can select to **Process** Queues (following from Step 5 in the previous procedure), or **Exit**.

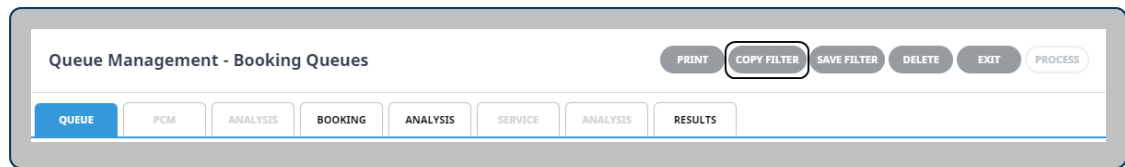


The procedures just described are sufficient to create manual filter criteria to monitor messaging queues from and to save filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes.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

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

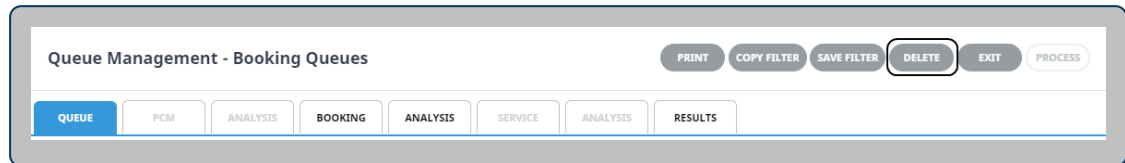
Copy Queue Management Filters

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



Deletion of Queue Management Filters

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



Recalculate Bookings

Recalculation of bookings can occur in bulk instead of booking by booking, selection of different fields will determine the bookings to be recalculated.

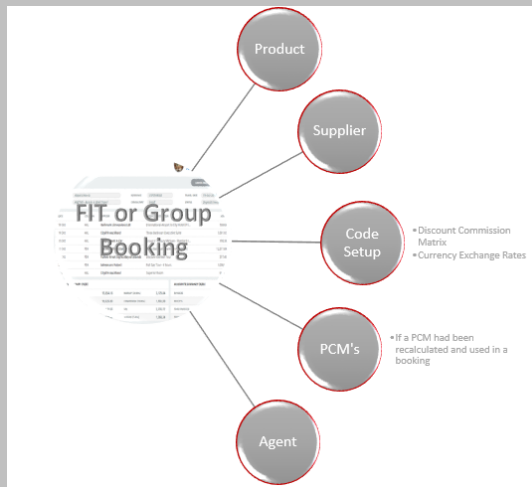
Selection can occur for

- » All bookings
- » FIT bookings
- » Group bookings

Closed bookings can be included or excluded.

This can be useful when (e.g.) a decision has been made to update booking level information such as commissions, mark-up or exchange rates. When the recalculate booking function is used the system will apply any amendments made within the system that may be relevant to the booking.

If changes are made to any of the applications noted below, the Bookings selected would be recalculated to reflect the change.



Recalculate Bookings

1. From the Home menu, select **Home > Operations > Booking Operations > Recalculate Bookings**.
2. On the blank **Recalculate All Bookings** screen, the **Booking Tab** will open, select the required filters from the field selections available within the **Booking Tab**, and the **Analysis Tab**. Click on the links to find out more about the fields [Booking Tab](#), [Analysis Tab](#).

NOTE: Travel Date From/To, and Date Entered From/To fields are defaulted to system settings, these fields can be amended to suit recalculation requirements.

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

Recalculate All Bookings
EXIT RECALCULATE SEARCH

BOOKINGS ANALYSIS RESULTS

TRAVEL DATE FROM 01-Jan-2022 TRAVEL DATE TO 17-Oct-2024
DATE ENTERED FROM 16-Jan-2022 DATE ENTERED TO 17-Oct-2024

AGENT FROM AGENT TO MASTER AGENT FROM MASTER AGENT TO
CONSULTANT BOOKING TYPE All booking types EXCLUDE CLOSED BOOKINGS BOOKING REF

BOOKING STATUS BRANCH DEPARTMENT

ALL CANCELLED CANCELLED WITH COST CONFIRMED DEPOSIT INVOICE FINALISED INVOICED QUOTATION
ALL ADMINISTRATION AUSTRALIAN OFFICE BALANCE SHEET NZ OFFICE ONLINE SALES UNASSIGNED USA OFFICE
ALL ADMINISTRATION COASTAL EXCURSIONS FIT GROUPS INCENTIVES INTERNET FIT SERIES TOURS SHORE EXCURSIONS SPECIAL GROUPS UNASSIGNED

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

Recalculate All Bookings
EXIT RECALCULATE SEARCH

BOOKING ANALYSIS RESULTS

BOOKING TYPE PAX NATIONALITY SOURCE

ALL CONFERENCE FAM TRIP INCENTIVE PACKAGE SERIES SPECIAL INTEREST TAILOR MADE/BESPOKE
ALL ARGENTINA AUSTRALIA CANADA CHINA COSTA RICA CZECHIA FRANCE
ALL ADVERTISEMENT BROCHURE DIRECT INTERNET TRAVEL AGENT TRAVELLED BEFORE UNASSIGNED

MARKUP M/A DOC'S STATUS REASON REFUSED

ALL MANUAL UNASSIGNED
ALL FINALISED IN PRODUCTION REQUESTED UNASSIGNED
ALL BOOKED ELSEWHERE ILLNESS PRICE SERVICE UNABLE TO TRAVEL UNASSIGNED

AGENT TYPE REGION PAYMENT TERMS
CONSORTIUM RATE GROUP SALES REP

- Check the **completed screens**.
- Click on the **Results Tab**. Select the services using the *Select* check-boxes next to each service, or

use **Select All**. Click on the link to find out more about the [Results](#) fields.

Recalculate All Bookings EXIT RECALCULATE SEARCH

BOOKING **ANALYSIS** **RESULTS**

SELECTED 0 FOUND 24 SELECT ALL UNSELECT ALL

☐	BOOKING NAME	CONSULTANT	BOOKING REF	TRAVEL DATE	AGENT	LAST SERVICE DATE
☐	USA Rail 2017 New Zealand Tour	GRB	USGP104505	20-Jan-2024	OVSCHI	23-Jan-2024
☐	Hornblower; Captain & Mrs H	GRB	USSE104517	18-Feb-2024	OVSCHOU	19-Feb-2024
☐	Moore Mr/Mrs G	GRB	NZSE104528	10-Apr-2024	ANZYVR	19-Apr-2024
☐	Wells Mr & Mrs G	GRB	USSE104525	10-Apr-2024	OVSCHI	23-Apr-2024
☐	P:Best of New Zealand - 10 Day Coach	GRB	NZSE104527	10-Apr-2024	SUNBKG	19-Apr-2024
☐	Hemsley Mr/Mrs A	GRB	USSE104531	14-Apr-2024	OVSCHI	23-Apr-2024
☐	AKLPKOOOC01ANZ10F	GRB	NZSE104526	14-Apr-2024	SUNBKG	24-Apr-2024
☐	Cameron Mr L & Mrs K	GRB	NZSE104524	21-Apr-2024	ANZYVR	30-Apr-2024
☐	Smith Mr/Mrs P.	GRB	USSE104530	21-Apr-2024	ANZYVR	30-Apr-2024
☐	P:Best of New Zealand - 10 Day Coach	GRB	NZSE104529	21-Apr-2024	SUNBKG	30-Apr-2024
☐	Brown Mr/Mrs G	GRB	NZFI104516	27-Apr-2024	OVSCHO	30-Apr-2024
☐	Andrews Ms J	GRB	USSE104536	28-Apr-2024	AGALAX	07-May-2024
☐	Howard Mr J.	GRB	NZSE104535	28-Apr-2024	AGALAX	07-May-2024
☐	Barclay Mr/Mrs R	GRB	NZSE104532	28-Apr-2024	ANZYVR	07-May-2024
☐	Foley Mr/Mrs J	GRB	USSE104533	28-Apr-2024	OVSCHI	07-May-2024

- If you want to recalculate, click **Recalculate**.

RECALCULATE

- On the **Recalculate Booking Settings** screen, check the required setting, and select if you want the system to update the exchange rates.

NOTE: The system will default to 'Replace All But Overrides', Click on the link to find out more about the [Recalculate Booking Settings](#).

Recalculate Booking Settings EXIT YES

☐ REPLACE ALL
☒ REPLACE ALL BUT OVERRIDES
☐ NO PRICES
☐ UPDATE EXCHANGE RATES

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

YES

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

- If '**OK**' was selected a **Recalculation Summary** will appear with the number of successful bookings to be recalculated.

Recalculation Summary OK

TOTAL PROCESSED 24

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

Booking Tab

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

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Consultant

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

Booking Types

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

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

Exclude Closed Bookings

Use this check box if closed bookings are to be excluded from search results.

Booking Ref

Used to select a specific booking reference.

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

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

Results Tab

Selected check-boxes

Bookings can be individually selected.

Select All/Unselect All

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

Selected

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

Found

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Recalculate Bookings, see ["Booking Operations" on page 226](#).

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

About Recalculation Settings

Replace All

Revisits the Tourplan Database and re-costs all services.

All Except Overrides

Revisits the Tourplan Database however does not re-cost services where the original product rates were manually overridden. Manually overridden values need to be confirmed with 'OK'.

No Prices

Recalculates the totals based on the existing service line values.

Update Exchange Rates

When the booking services are re-costed should Tourplan Continue to use the previous Exchange Rates (unchecked) or use the Exchange Rates from the Tourplan Code Setup Module.

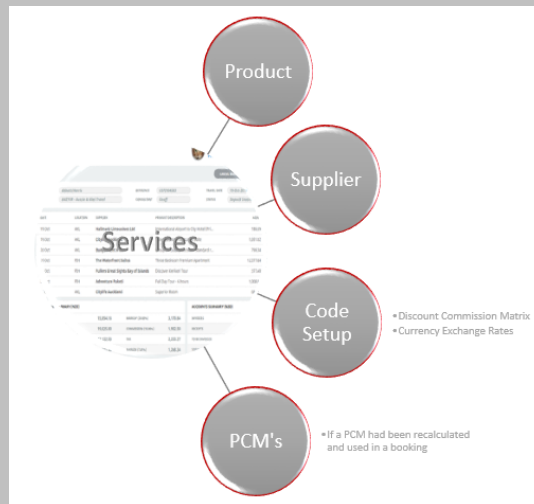
Recalculate Services

Recalculation of Services can occur in bulk instead of booking by booking, selection of different fields will determine the Services to be recalculated.

Selection can occur for services included in:

- » FIT bookings.
- » Group bookings.

If changes are made to any of the applications noted below, the services would be recalculated to reflect the change. Booking totals would be recalculated to reflect changes made to services within the booking.



Recalculate All Services

1. From the Home menu, select **Home > Operations > Booking Operations > Recalculate Services**.
2. On the blank **Recalculate All Services** screen, the **Services Tab** will open, select the required filters from the field selections available within the **Services Tab**, and the **Analysis Tab**. Additional booking filters are available within the **Booking** and (Booking) **Analysis** tabs. Click on the links to find out more about the fields [Booking Tab](#), [Analysis Tab](#) (Booking and Agent), [Service Tab](#), and [Analysis Tab](#) (Supplier and Product).

NOTE: Service Date From/To are defaulted to today's date, these fields can be amended to suit recalculation requirements.

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

Recalculate All Services EXIT RECALCULATE SEARCH

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

SERVICE DATE FROM: 16-Sep-2024
 SERVICE DATE TO: 16-Sep-2024
 SUPPLIER FROM:
 SUPPLIER TO:
 MASTER SUPPLIER FROM:
 MASTER SUPPLIER TO:
 LOCATION:
 CODE FROM:
 CODE TO:

SERVICE STATUS	SERVICE
☒ ALL	☒ ALL
☒ AMENDED FROM KK	☒ ACCOMMODATION
☒ AMENDED FROM RQ	☒ ACTIVITY
☒ AMENDED FROM WL	☒ CANCELLATION FEE
☒ CANCELLED	☒ CRUISE
☒ CANCELLED - CHARGE	☒ ENTRANCE FEE
☒ CONF FROM ALLOCATION	☒ FLIGHT
☒ CONFIRMED	☒ GUIDE
☒ CONFIRMED FREESALE	☒ ITINERARY TEXT
☒ INITIAL STATUS	☒ MEAL
☒ ITINERARY ONLY	☒ PACKAGE
☒ NOT BOOKED	☒ RENTAL VEHICLE
☒ ON REQUEST	☒ SIGHTSEEING/DAY TOUR
☒ OPTIONAL SERVICE	☒ SUNDRY

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

Recalculate All Services EXIT RECALCULATE SEARCH

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

SUPPLIER TYPE	REGION	ELECTRONIC PAY FLAG
☒ ALL	☒ ALL	☒ ALL
☒ ACCOMMODATION	☒ AUCKLAND	☒ ELECTRONIC FUNDS TRANSFER
☒ SIGHTS/MEALS/ACTIVITY/ENTRY	☒ BANKS PENINSULA	☒ UNASSIGNED
☒ TRANSPORT	☒ BAY OF PLENTY	
☒ UNASSIGNED	☒ CANTERBURY	
	☒ CENTRAL OTAGO	
	☒ COROMANDEL	
	☒ EAST COAST NORTH ISLAND	

SUPPLIER CHAIN	BRAND WITHIN CHAIN	INTERNAL RATING
☒ ALL	☒ ALL	☒ ALL
☒ ACCOR HOTELS	☒ CITY LIFE	☒ 1.5 STAR
☒ AMORA HOTELS	☒ COTHORNE	☒ 1STAR
☒ BELLA VISTA MOTEL GROUP	☒ CROWNE PLAZA	☒ 2 STAR
☒ BOUTIQUE HOTELS	☒ GRAND MERCURE	☒ 2.5 STAR
☒ CHOICE HOTELS	☒ HERITAGE	☒ 3 STAR
☒ DISTINCTION HOTELS	☒ HOLIDAY INN	☒ 3.5 STAR
☒ HERITAGE HOTELS	☒ IBIS	☒ 4 STAR

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

3. Check the **completed screens**.
4. Click on the **Results Tab**. Select the services using the *Select* check boxes next to each service, or

use *Select All*. Click on the link to find out more about the [Results](#) fields.

Recalculate All Services EXIT RECALCULATE SEARCH

BOOKING **ANALYSIS** **SERVICE** **ANALYSIS** **RESULTS**

SELECTED 0 FOUND 1 SELECT ALL UNSELECT ALL

DATE	VOUCHER SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS
16-Sep-2024	103,754 CAHC01	ROH	Superior Room	NZFI104690	NB

5. If you want to recalculate, click **Recalculate**.

RECALCULATE

6. On the **Recalculate Service Settings** screen, check the required setting, and select if you want the system to update the exchange rates. Click on the link to find out more about the [Recalculate](#) settings.

NOTE: The system will default to Replace All But Overrides.

Recalculate Service Settings EXIT YES

☐ REPLACE ALL

☒ REPLACE ALL BUT OVERRIDES

☐ NO PRICES

☐ UPDATE EXCHANGE RATES

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

YES

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

9. If 'OK' was selected a **Recalculation Summary** will appear with the number of successful bookings to be recalculated.

Recalculation Summary OK

TOTAL PROCESSED 1

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

About Recalculate All Services Fields

Booking Tab

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

Travel Date From/To

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

Agent From/To

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

Master Agent From/To

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

Date Entered From/To

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

Consultant

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

Booking Types

Drop down selection for the type of bookings to work with includes:

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

Booking Ref

Used to select a specific booking reference.

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

Booking Analysis

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

Agent Analysis

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

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

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

Service Tab

The services tab will open by default.

Services Date From/To

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

Supplier From/To

Used to select services with a specific, or range of, supplier(s) codes that services are attached to.

Master Supplier From/To

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

Location

Used to select services with a specific location attached.

Code From/To

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

Service Status

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

Service

By default, all service (types) are checked and bookings that have those services will be selected.

Analysis Tab (Supplier and Product Analysis)**Supplier Analysis**

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

Product Analysis

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

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

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

Results Tab**Selected check boxes**

Bookings can be individually selected.

Select All/Unselect All

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

Selected

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

Found

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

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Recalculate All Services, see ["Booking Operations" on page 226](#).

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

About Recalculate All Services Settings**Replace All**

Revisits the Tourplan Database and re-costs all services.

All Except Overrides

Revisits the Tourplan Database however does not re-cost services where the original product rates were manually overridden. Manually overridden values need to be confirmed with the OK Button.

No Prices

Recalculates the totals based on the existing service line values.

Update Exchange Rates

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

CHAPTER 4

Service Operations

The Service Operations Menu is where the Resource Assignment application is accessible from. The Service Operations menu also includes Update Pickup/Dropoff information and Substitute Services for Resource Assignments.

The Resource Assignment application enables resources that have been created in Code Setup to be assigned to booked services.

NOTE: The setting up of these resource codes is covered in the System Setup User Manual.

Assignments can be edited and re-assigned where necessary, providing users with the ability to shift services between assignments.

Assignment can be reserved 'out of service' if for example a vehicle requires maintenance and cannot be used for a period of time using a reserve resources function. Manifests can be printed from within resource assignments for drivers and/or guides to receive an accurate passenger manifest.

This chapter will take you through setting up new assignments, editing existing assignments including bulk updating or substituting services. How to print manifests, join services or share costs across multiple bookings.

In this chapter ...

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Resource Assignment

There are three resource "types" available and the most common resource descriptions are Vehicles, Drivers and Guides.

Assignments can be:

- » Edited and re-assigned where necessary, providing users with the ability to shift services between assignments.
- » Reserved 'out of service' if for example a vehicle requires maintenance and cannot be used for a period of time using a reserve resources function.
- » Manifests can be printed from within resource assignments, for drivers and/or guides to receive an accurate passenger manifest.

The Resource Assignment application allows organisations to configure the individual set up of assignments to suit specific business operations. The setup requirements are dependant on the organisations resources and services offered.

It's because of the flexibility with assignments that Tourplan provides unique setup options. We define the use of Resource Assignment types as; Single Task, Independent Services, or Hop on Hop off.

An explanation on the different Tourplan definitions of these types of services are provided on the following pages.

If you are unsure on the setup type suited for your organisations operational requirements we suggest contacting your local Tourplan Support Team, or speaking with a member of the Tourplan Training Team who will be able to guide you on the appropriate settings.

Single Task

All services within the assignment are treated as a single task for the resource assigned to them. Any minimum or maximum passenger restrictions will be based on the total number of passengers on the service assigned.

A typical use for this type of assignment would be the consolidation of transfers or sight-seeing services. For example you may have 7 passengers booked across many bookings that require an airport to city transfer. You are providing a single assignment to transfer all passengers. The total sum of all passengers using this assignment will need to fit within the assigned vehicle.

Transfer	Pax	Total Number of Passengers Assigned to the Vehicle
Collect Guest A + B from Airport and drop off at Hotel A		
Collect Guest C + D from Airport and drop off at Hotel A		
Collect Guest E + F + G from Airport and drop off at Hotel B		

Independent Service

Each service on the assignment is to be operated independently. This type of assignment would be used when you are assigning resources on a daily/weekly basis and each service has a task.

A typical use for this assignment would be groups of passengers where the service of the assignment is to be completed before the next service is started.

For example this assignment is required to complete three tasks:

- » Transfer 1: collect 2 passengers from the airport and transfers at Hotel A
- » Transfer 2: collect 2 guests from Hotel B and transfer at Airport
- » Transfer 3: collect 6 passengers from Hotel C and transfers at Activity A

Each transfer would be completed before collecting the next transfer. Pick-up and drop off times are used for this type of assignment, so that the resource is not double booked.

Transfer	Pax	Total Number of Passengers Assigned to the Vehicle
Collect Guest A + B from Airport and drop off at Hotel A		
Collect Guest C + D from Hotel B and drop off at Airport		
Collect Guest E + F + G + H + I + J from Hotel C and drop off at Activity A		

Hop on Hop off

Multiple services are assigned that may or may not occur simultaneously so you have the situation where Vehicle 1 is assigned to multiple transfers that overlap.

In this example the total passenger count does not exceed 7 as this 'vehicle' assignment has a maximum seat capacity of 7. The assignment collects and drops guests to and from different locations where guests 'hop on and hop off' the same service. Pick up and drop off locations and times are used to effectively manage the resource.

Transfer	Pax		Total Number of Passengers Assigned to the Vehicle
	Pick Up	Drop Off	
Collect Guest A + B from Airport			
Collect Guest C from Hotel A			
Drop off Guest A + B at Hotel A			
Collect Guest D + E + F from Hotel B			
Drop off Guest C at Airport			
Drop off Guest D + E + F at Activity A			

Assignment Maximum Vehicle Capacity is 7

Using Resource Assignment Categories

There is an alternative feature available to organisations who may require a resource assignment to involve more than one category. This is designed for organisations who may have another layer of resources to assign to a group or individual services.

For example; a common scenario is for passengers to be assigned to a particular vehicle, driver and guide for their service. Some organisations may wish to offer another meet and greet service provided by the tour operator, or perhaps a hotel representative is to be assigned on arrival. The traditional method of Resource Assignment setup would not allow two records to be held for one service as required in this situation.

Type	Definition																																				
Using two (or more) categories	In this example all services within the assignment are treated as a single task. There are two traditional Vehicle + Driver/Guide assignments; two transfer services pick up guest from 5 different bookings and deliver them to their respective hotels. The passengers are assigned to vehicles with a capacity of 7 seats and a passenger manifest would be available for the driver/guide to operate these transfer services. There is also a hotel representative for each hotel who needs to meet with their respective passengers on arrival. Representative A has 10 passengers to meet and requires their own manifest from multiple transfer arrivals. Given that there is a requirement for two resource assignments to be allocated simultaneously, an additional category is created in system setup to cater for this occurrence. <table><tr><th rowspan="2">Transfer</th><th rowspan="2">Pax</th><th rowspan="2">Total Number of Passengers Assigned to the Vehicle + Driver/Guide</th><th colspan="3">Total Number of Passengers Assigned to (Category) 'Hotel Representative'</th></tr><tr><th>Representative A</th><th>Representative B</th><th>Representative C</th></tr><tr><td>Collect Guest A + B from Airport and drop off at Hotel A</td><td></td><td rowspan="3"> Vehicle 1 </td><td>Meet Guest A + B </td><td></td><td></td></tr><tr><td>Collect Guest C + D from Airport and drop off at Hotel A</td><td></td><td>Meet Guest C + D </td><td></td><td></td></tr><tr><td>Collect Guest E + F + G from Airport and drop off at Hotel B</td><td></td><td></td><td>Meet Guest E + F + G </td><td></td></tr><tr><td>Collect Guest H + I + J + K + L + M from Airport and drop off at Hotel A</td><td></td><td rowspan="2"> Vehicle 2 </td><td>Meet Guest H + I + J + K + L + M </td><td></td><td></td></tr><tr><td>Collect Guest N from Airport and drop off at Hotel C</td><td></td><td></td><td></td><td>Meet Guest N </td></tr></table>	Transfer	Pax	Total Number of Passengers Assigned to the Vehicle + Driver/Guide	Total Number of Passengers Assigned to (Category) 'Hotel Representative'			Representative A	Representative B	Representative C	Collect Guest A + B from Airport and drop off at Hotel A		 Vehicle 1 	Meet Guest A + B 			Collect Guest C + D from Airport and drop off at Hotel A		Meet Guest C + D 			Collect Guest E + F + G from Airport and drop off at Hotel B			Meet Guest E + F + G 		Collect Guest H + I + J + K + L + M from Airport and drop off at Hotel A		 Vehicle 2 	Meet Guest H + I + J + K + L + M 			Collect Guest N from Airport and drop off at Hotel C				Meet Guest N 
Transfer	Pax				Total Number of Passengers Assigned to the Vehicle + Driver/Guide	Total Number of Passengers Assigned to (Category) 'Hotel Representative'																															
		Representative A	Representative B	Representative C																																	
Collect Guest A + B from Airport and drop off at Hotel A		 Vehicle 1 	Meet Guest A + B 																																		
Collect Guest C + D from Airport and drop off at Hotel A			Meet Guest C + D 																																		
Collect Guest E + F + G from Airport and drop off at Hotel B				Meet Guest E + F + G 																																	
Collect Guest H + I + J + K + L + M from Airport and drop off at Hotel A		 Vehicle 2 	Meet Guest H + I + J + K + L + M 																																		
Collect Guest N from Airport and drop off at Hotel C					Meet Guest N 																																

Reserve Resources

The Resource Assignment application enables resources to be reserved, and it is possible to create an assignment that has no services attached to it. This is particularly useful where organisations may need to remove a vehicle from service for maintenance. The vehicle would then not be able to be assigned.

Users can also choose to allocate a resource for specific dates (start and end dates) where the resource can be reserved, these assignments can then be edited at a later date and have services attached to them if required.

Reserve Resources

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. If you want to reserve a resource, click **Reserve Resources**.



3. On the **Reserve Resources** screen, enter a *Name*, and select an *Assignment Status*. Select a *Start Date* and *End Date* and if you know the *Start* and *End Times* enter these too.

4. Select a resource, vehicle, driver or guide.
5. Check the **completed screen**.
6. Click **Save** to keep the changes.
7. Click **Exit** to discard any changes.

Continue adding resources until you have completed the fleet of vehicles, number of drivers or guides necessary for your organisation.

The following procedures will include assigning the resources (once reservations have been put in place - either through the FITs or Groups booking applications).

New Assignment

Once services have been sold from within FIT or Group bookings passengers can be 'grouped' through the Resource Assignment application. Users search for services using the required filters and passengers are allocated a vehicle and driver, and if applicable a guide can also be assigned.

Multiple assignments can be generated collectively. The procedure below details how to create a new assignment for a single service. The actual procedure is the same for an independent service or a hop on hop off assignment, however multiple services need to be selected for the assignment type (Independent Services or Hop on Hop off) for check boxes to be available for selection.

If layers of resources are required for passengers to be assigned to more than one resource category. An additional field called [Assignment Category](#) can be enabled which provides the alternative solution. To enable this function multiple categories are configured in the System Setup application - see [System Setup User Manual](#).

Create a New Assignment

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. Click **New Assignment** to insert a new assignment.

NEW ASSIGNMENT

3. On the **New Assignment** screen, select *Service Date From/To*, and select required filters to return results based on the filters entered.

NOTE: The [Service Tab](#) will open, required filters can be selected from within the [Booking Tab](#), [Analysis Tab](#) (Booking and Agent), Service, or [Analysis Tab](#) (Supplier and Product). Click on the links to find out more about the fields.

The Service From/To dates will default to today's date, these can be changed depending on the required dates.

In this example, the service dates from and to have been selected as 22 April 2025 and results are required for Transfer Services only.

The screenshot shows the 'New Assignment' screen with the following details:

- Title:** New Assignment (circled in red)
- Buttons:** EXIT, CREATE ASSIGNMENT, SEARCH
- Tabs:** BOOKING, ANALYSIS, SERVICE (selected), ANALYSIS, RESULTS
- Filters:**
 - SERVICE DATE FROM: 22-Apr-2025
 - SERVICE DATE TO: 22-Apr-2025
 - SUPPLIER FROM: [Dropdown]
 - SUPPLIER TO: [Dropdown]
 - CODE FROM: [Text]
 - CODE TO: [Text]
 - DATE ENTERED FROM: [Text]
 - DATE ENTERED TO: [Text]
 - MASTER SUPPLIER FROM: [Dropdown]
 - MASTER SUPPLIER TO: [Dropdown]
 - LOCATION: [Dropdown]
 - INCLUDE ASSIGNED DRIVER: [Unchecked]
 - INCLUDE ASSIGNED VEHICLE: [Unchecked]
 - INCLUDE ASSIGNED GUIDE: [Unchecked]
- SERVICE STATUS (Left List):**
 - ALL (checked)
 - AMENDED FROM KK (checked)
 - AMENDED FROM RQ (checked)
 - AMENDED FROM WL (checked)
 - CANCELLED (checked)
 - CANCELLED - CHARGE (checked)
 - CONF FROM ALLOCATION (checked)
 - CONFIRMED (checked)
 - CONFIRMED FREESALE (checked)
 - INITIAL STATUS (checked)
 - ITINERARY ONLY (checked)
 - NOT BOOKED (checked)
 - ON REQUEST (checked)
 - OPTIONAL SERVICE (checked)
 - PACKAGE SERVICE (checked)
- SERVICE (Right List):**
 - ACTIVITY (unchecked)
 - CANCELLATION FEE (unchecked)
 - CRUISE (unchecked)
 - ENTRANCE FEE (unchecked)
 - FLIGHT (unchecked)
 - GUIDE (unchecked)
 - ITINERARY TEXT (unchecked)
 - MEAL (unchecked)
 - PACKAGE (unchecked)
 - RENTAL VEHICLE (unchecked)
 - SIGHTSEEING/DAY TOUR (unchecked)
 - SUNDRY (unchecked)
 - SURCHARGE FEE (unchecked)
 - TRANSFER (checked)
 - TRANSPORT (unchecked)

4. Check the **completed screens**.

- Click on the **Results Tab** or click **Search**. Select the bookings using the *Select* check boxes next to each booking or use *Select All*. Click on the link to find out more about the [Operations > Resource Assignment > New Assignment > Results Tab](#) fields.

In this example there are two bookings that have been selected, and the pick up and drop off details are available if they have been inserted into the booking. A Vehicle and Driver/Guide can be assigned for this group. Selection of group numbers is possible under the Pick up Tab group dropdown, in this case there is one group created in this assignment.

New Assignment
EXIT
CREATE ASSIGNMENT
SEARCH

BOOKING
ANALYSIS
SERVICE
ANALYSIS
RESULTS

GROUP BOOKING	PRODUCT	PAX PU/DO DETAILS
☒ Douglas Mr K & Mrs L USF1104701	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 10:50 Arrive: NZ123 22-Apr-2025 11:30 Crowne Plaza Auckl
☒ Motrum Mr B & Mrs F USF1104702	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 10:50 Arrive: NZ123 22-Apr-2025 11:30 Crowne Plaza Auckl

SELECT ALL
UNSELECT ALL

SELECT SERVICE

ASSIGN
PICKUP

GROUP
1
NAME
VEHICLE
DRIVER
GUIDE

CURRENT ASSIGNMENT
ADULTS 0
CHILDREN 0
INFANTS 0
TOTAL PAX 0
SERVICES 0

TOTALS
ADULTS 4
CHILDREN 0
INFANTS 0
TOTAL PAX 4
SERVICES 2
ASSIGNMENTS 1

- On the **Assign Tab**, enter an (Assignment) *Name*, and select a *Vehicle* and *Driver*.

NOTE: Bookings need to be selected before the assignment of Vehicle Drivers or Guides can occur. Click on the link to find out more about the [Assign Tab](#) fields.

New Assignment EXIT CREATE ASSIGNMENT SEARCH

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
☒ GROUP BOOKING				
☒ Douglas Mr K & Mrs L USF1104701	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 10:50 Arrive: NZ123 22-Apr-2025 11:30 Crowne Plaza Auckl		
☒ Motrum Mr B & Mrs F USF1104702	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 10:50 Arrive: NZ123 22-Apr-2025 11:30 Crowne Plaza Auckl		

SELECT ALL **UNSELECT ALL**

☒ SELECT SERVICE

ASSIGN **PICKUP**

GROUP

NAME

VEHICLE

DRIVER

GUIDE

CURRENT ASSIGNMENT

ADULTS 0

CHILDREN 0

INFANTS 0

TOTAL PAX 0

SERVICES 0

TOTALS

ADULTS 4

CHILDREN 0

INFANTS 0

TOTAL PAX 4

SERVICES 2

ASSIGNMENTS 1

In this example three bookings have been selected and two (group) assignments have been defined. A different vehicle, driver and or guide can be selected per group. The group number can be assigned by highlighting the booking and selecting the group number.

New Assignment EXIT CREATE ASSIGNMENT SEARCH

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
☐ GROUP BOOKING				
☐ Whyte Mr & Mrs B USF1104684	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 22-Apr-2025		
☒ 2 Robson Mr and Mrs V USF1104570	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 11:00 Arrive: NZ564 22-Apr-2025 11:30		
☒ 1 Robson Mr & Mrs K USF1104678	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 22-Apr-2025		
☒ 1 Robson Mr & Mrs K USF1104568	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 10:50 Arrive: NZ123 22-Apr-2025 11:30 Crowne Plaza Auckl		
☐ Robson Mr & Mrs K-jms USF1104687	AKL/TF/HMLA01/INTHOT International Airport to City Hc	2 22-Apr-2025 10:50 Arrive: NZ123 22-Apr-2025 11:30		

SELECT ALL **UNSELECT ALL**

☒ SELECT SERVICE

ASSIGN **PICKUP**

GROUP

NAME

VEHICLE

DRIVER

GUIDE

- If the pick up details are known but not included in the booking, updates to the pick up/drop off fields can occur. Highlight the booking and select the **Pick Up Tab**. If known enter a *Pick up Time, Location* and a *Drop off Time and Location* enter any remarks and select **Edit Details**. Click on the link to find out more about the [Pick up](#) Tab fields.

In this example the pick up and drop off times and locations are known and have been updated.

8. Click **Create Assignment** to create an assignment.

CREATE ASSIGNMENT

9. On the **Assignment Details** screen, the **Assignment Tab** will open. The *Name*, *Assignment Status*, *Start/ End Dates* will default from the previous screen. These fields can be altered if necessary, but generally these would not require amendment. Select the *Assignment Type* required and enter any *Assignment Notes* that maybe applicable to your employees.

10. Check the **completed screens**.
11. Click **Save** to keep the changes.
Or **Save All** if creating more than one Resource Assignment.
12. Click **Exit** to discard any changes.

About New Assignment Fields

NOTE: The fields discussed below assume that the assignment uses one category. Organisations that use resources allowing services to be assigned more than once will see subtle screen differences. Namely an assignment dropdown category field will be enabled and visible for selection throughout the procedure.

Service Tab

NOTE: Assignment Category - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Service Date From/To

These dates will default to today's date, specific date or date ranges are available for selection of services for the assignment.

Supplier From/To

Specific supplier or range of suppliers for selection of services for the assignment.

Code From/To

Specific (Product) Code from and to for selection of services for the assignment.

Date Entered From/To

Specific date range of when the booking was entered.

Master Supplier From/To

Specific master supplier or range of master suppliers for selection of services for the assignment.

Location

Specific location of a service for the assignment.

Service Status

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

Service

By default, all service (types) are checked and bookings that have those services will be selected.

NOTE: Additional filters can be used to filter the returned results.

Booking Tab

New Assignment EXIT CREATE ASSIGNMENT SEARCH

BOOKING

ANALYSIS

SERVICE

ANALYSIS

RESULTS

TRAVEL DATE FROM		LAST SERVICE DATE FROM	
TRAVEL DATE TO		LAST SERVICE DATE TO	
BOOKING NAME		DATE ENTERED FROM	
BOOKING REF FROM		DATE ENTERED TO	
BOOKING REF TO		BOOKING TYPE	All booking types
AGENT FROM		MASTER AGENT FROM	
AGENT TO		MASTER AGENT TO	
CONSULTANT		CURRENCY	

BOOKING STATUS

BRANCH

DEPARTMENT

☒ ALL
☒ CANCELLED
☒ CANCELLED WITH COST
☒ CONFIRMED
☒ DEPOSIT INVOICE
☒ FINALISED
☒ INVOICED
☒ QUOTATION

☒ ALL
☒ ADMINISTRATION
☒ AUSTRALIAN OFFICE
☒ BALANCE SHEET
☒ NZ OFFICE
☒ ONLINE SALES
☒ UNASSIGNED
☒ USA OFFICE

☒ ALL
☒ ADMINISTRATION
☒ COASTAL EXCURSIONS
☒ FIT
☒ GROUPS
☒ INCENTIVES
☒ INTERNET FIT
☒ SERIES TOURS
☒ SHORE EXCURSIONS
☒ SPECIAL GROUPS
☒ UNASSIGNED

Travel Date From/To

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

Booking Name

Selection for services for a specific booking name.

Booking Ref From/To

Used to select bookings with a specific, or range of, reference numbers that services are to be output from.

Agent From/To

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

Consultant

This field filters by the consultant code attached to the bookings for the services to be selected.

Last Service Date From/To

Used to select services with a specific last service date.

Date Entered From/To

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

Booking Types

Drop-down selection for the type of bookings that services are to be output from selection includes:

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

Master Agent From/To

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

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

Currency

The booking currency of the services selected.

Booking Status

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

Branch

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

Department

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

Analysis Tab (Booking and Agent Analysis)

New Assignment

EXIT
CREATE ASSIGNMENT
SEARCH

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
+ BOOKING TYPE	▼	PAX NATIONALITY	▼	SOURCE
+ MARKUP M/A	▼	DOC'S STATUS	▼	REASON REFUSED
+ AGENT TYPE	▼	REGION	▼	PAYMENT TERMS
+ CONSORTIUM	▼	RATE GROUP	▼	SALES REP

Booking Analysis

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

Agent Analysis

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

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

NOTE: The label descriptions and analysis selections used within this user manual will vary and will display the headings that have been setup in each users companies system.

Analysis Tab (Supplier and Product Analysis)

New Assignment EXIT CREATE ASSIGNMENT SEARCH

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
+	SUPPLIER TYPE	▼	REGION	▼
+	SUPPLIER CHAIN	▼	BRAND WITHIN CHAIN	▼
+	SERVICE CATEGORY	▼	PASS TYPE	▼
+	ANALYSIS 4	▼	ANALYSIS 5	▼

Supplier Analysis

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

Product Analysis

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

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

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

Results Tab

Selected check boxes

Bookings can be individually selected from the Results Tab (main screen) and grouped, the group value/number is assigned within the Assign tab (to the right of the screen). This is also where a vehicle can be assigned per group.

The screen capture below is showing group number 2, with a group name of SUSA01, a vehicle can be assigned to this group (group 2). A different vehicle could then be assigned to Group 1 by using the Group drop-down and selecting 1 assigning a different vehicle to this group.

ASSIGN PICKUP

GROUP	2 ▼
NAME	SUSA01
VEHICLE	▼
DRIVER	▼
GUIDE	▼

Selected check boxes

Bookings can be individually selected.

Group

The Group number.

Booking

Name and reference number of booking.

Product

Product string and product description.

Pax

Number of pax booked per booking.

PU/DO Details

Pick up and drop off dates, times and locations will show if they are loaded against a booking. This information can be edited by selecting the booking, amending the pick up details within the pick up tab to the right of the screen and selecting edit details.

Select All/Unselect All

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

Totals

The system will keep a total of Assignments (selected), Services (used), and a Total pax count broken into number of Adults, Children and Infants within both the 'Assign' and 'Pick up' tabs to the bottom left of the screen.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings for a New Assignment, see ["Resource Assignments" on page 234](#).

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

About the Assign Tab Fields

Group

Individual group numbers can be selected and assigned to different bookings, this allows for multiple assignments to be generated at one time.

Name

A name for the assignment. Duplicate descriptions can be used if required, user company's will decide on the naming convention required for assignment names.

Vehicle

Vehicles would have been defined in the Code Setup, and selectable options for this assignment/s will be available when using the dropdown.

Driver

Drivers would have been predefined in Code Setup, and selectable options for this assignment/s will be available when using the dropdown.

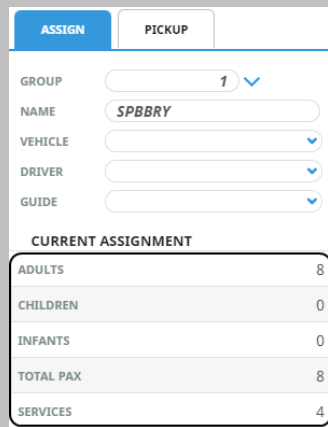
Guide

Guides would have been predefined in Code Setup, and selectable options for this assignment/s will be available when using the dropdown.

Current Assignment (Totals)

The system will provide totals per assignment 'group' number, providing the number of Services (selected), number of Adults, Children, Infants and Total Pax selected for this assignment.

In this example the screen capture is of the assignment tab on the right of the New Assignment screen. This assignment includes 4 Services, 8 Adults, 0 Children, 0 Infants, with a total pax count of 8 Adults.



CURRENT ASSIGNMENT	
ADULTS	8
CHILDREN	0
INFANTS	0
TOTAL PAX	8
SERVICES	4

Pick Up Tab

Provides information on the services that were selected in the results tab.

- » Services can be viewed or un-selected from within the Services Tab.
- » Service details such as pick up and drop off details or remarks fields can be edited.
- » Edits to service details can be done for individual booking services or all bookings.

About Assignment Details

Assignment Tab



The left of the screen will show a list of groups if more than one group was selected when assigning resources. Users will work with one group at a time by selecting each group separately.

NOTE: Assignment Category - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Name

The name given to the assignment, within the previous screen assign tab.

Assignment Status

Specific assignment status can be selected from a pre-defined list of statuses.

Start/End Dates

A specific date or a range of dates are available.

Adults, Children, Infants, Total Pax and Pax Allowed

This information is read only and displays from the totals in the previous screen. The information cannot be amended here.

Assignment Type

- » **Single Task** - All services on the assignment are to be treated as a single task for the resource assigned to them. This means that any minimum/maximum number of passenger restrictions will be based on the total number of passengers in the service assignment.

- » **Independent Services** - Each service in the assignment is to be operated independently. This type of assignment would be used where you are assigning resources on a daily/weekly basis and each service is a task in its own right.
- » **Hop on- Hop off** - Multiple services are assigned that may or may not occur simultaneously so you have the situation where multiple services overlap.
- » **Substitute Services** - This setting is most commonly used when the service costs are going to be joint and the costs of the service is to be shared across multiple bookings. If users decide to split the costs of the service over multiple bookings the service must be the same services and may require the original service to be substituted. This is discussed in more detail within ["Substituting Services" on page 171](#) procedures.
- » **Join Services** - Selection can occur to join the service and share the cost, more detail is discussed within the ["Joining Services and Sharing Costs" on page 167](#) procedures.

Assignment Note

Free format note field can be used to insert specific assignment notes.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display with a check box (to un-select if necessary). It may be beneficial for organisations to select the vehicles, drivers and guides at this point and it will depend on the workflow used and fleet available when assigning your resources. Some operational procedures will allow earlier assignment within the 'Assign' tab and other tour operators may select to allocate the resources at this point.

Services Tab

NOTE: The left of the screen will show a list of groups if more than one group was selected when assigning resources. Users will work with one group at a time by selecting each group separately and a list of services attached to each group is available when using the services tab.



The arrow to the left can be used to view or edit pick up and drop off details per booking.

Editing an Assignment

Once bookings have been assigned to Resources the assignment at any time can be edited, additional services (or bookings) can be included, and pick up and drop off information can be updated if required.

Edit an Assignment

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. Expand the Resource Assignment Filters by clicking the + next to the Resource Assignment Filters. Select the required **filters** to narrow the results of the resources already assigned.

3. If you want to keep the changes, click **OK**.
4. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the Resource Assignment line.
5. On the Edit Assignment screen **Assignment Tab**, edit the required fields.

 The most common amendment will be updating the Assignment Status, or adding Assignment Notes. There may be occasions where a vehicle or driver may need to be re-assigned.

The number of adults, children and infants showing as booked on this assignment cannot be altered as they are totalled from the services booked within the FIT or Groups Bookings.

6. Check the **completed** screen.

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

Include Additional Booking (Services)

Follow the above procedure to procedure number 4.

5. On the Edit Assignment screen select **Include Services**.

INCLUDE SERVICES

6. On the Include Services screen, select *Service Date From/To*, and select required filters to return results based on the filters entered.

NOTE: The [Service Tab](#) will open, required filters can be selected from within the [Booking Tab](#), [Analysis Tab](#) (Booking and Agent), Service, or [Analysis Tab](#) (Supplier and Product). Click on the links to find out more about the fields.

The Service From /To dates will default to today's date, these can be changed depending on the required dates.

7. Click **Search**.
8. Select the bookings using the *Select* check boxes next to each booking or use *Select All*. Click on the link to find out more about the [Results Tab](#) fields.
9. Click **OK** to keep the changes and save or update the entry.
 - a. Click **Exit** to discard any changes.
10. On the Edit Assignment Screen new services can be saved by selecting **Save**. The screen can be exited by selecting **Exit**, or further services can be included by selecting **Include Services**.

Adding Pick up and Drop off Details to an Assignment.

Follow the above procedure to procedure number 4.

5. On the Edit Assignment screen, select the Services Tab.
 6. Highlight the booking (service) and insert the Pick Up and Drop Off details.
 7. Select **Edit Service Details**.
- EDIT SERVICE DETAILS
8. Continue to edit the pick up and drop off details for the services within the assignment.
 9. Click **Save** to keep the changes.
 10. Click **Exit** to discard any changes.



An alternative solution to updating pick up and drop off information for multiple bookings is to use the Update Pickup/Dropoff UI. [Booking Operations > Booking Operations > Update Pickup/Dropoff](#) or [Operations > Resource Assignment > Update Pickup/Dropoff](#)

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: Assignment Category - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

NOTE: It is not necessary to define as many filters as we have in the example.

— RESOURCE ASSIGNMENT FILTERS

ALL ASSIGNMENTS WITHIN

22-Apr-2025



00:00

22-Apr-2025



23:59

ASSIGNMENT NAME

AKL Airport to Hotel

ASSIGNMENT STATUS

IA - Initial Assignment

VEHICLE

MB1 - Mercedes Benz Minibus JHT970

DRIVER

BB - Bob Brown

GUIDE

BOOKING NAME

BRANCH

Unassigned

DEPARTMENT

Unassigned

AGENT

CLEAR

OK

The more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

About Edit Assignment Fields

The Edit Assignment screen is split into two tabs, the **Assignment Tab** which displays the details of the current assignment, and the **Services Tab** which displays all service line details.

Assignment Tab

Name

The name given to the assignment within the previous screen assign tab.

Assignment Status

Specific assignment status can be selected from a pre-defined list of statuses.

Start/End Dates

A specific date or a range of dates are available.

Adults, Children, Infants, Total Pax and Pax Allowed

This information is read only and displays from the totals in the previous screen. The information cannot be amended here.

Assignment Type

- » **Single Task** - All services on the assignment are to be treated as a single task for the resource assigned to them. This means that any minimum/maximum number of passenger restrictions will be based on the total number of passengers in the service assignment.
- » **Independent Services** - Each service on the assignment is to be operated independently of each other. This type of assignment would be used where you are assigning resources on a daily/weekly basis and each service is a task in its own right.
- » **Hop-on/Hop-off** - Multiple services are assigned that may or may not occur simultaneously so you have the situation where multiple services overlap.
- » **Contains Joint Services** - This radio button is read only and displays that the assignment contains joint services that share costs, more detail is discussed within the "[Joining Services and Sharing Costs](#)" on page 167 procedures.

Assignment Notes

Free format note field can be used to insert specific assignment notes.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here and any pre-selected resources will display with a check box (to un-select if necessary).

Service Tab

NOTE: The left of the screen will show a list of groups if more than one group was selected when assigning resources. Users will work with one group at a time by selecting each group separately and a list of services attached to each group is available when using the services tab.

Edit Assignment (AKL Airport to Hotel) PRINT MANIFEST DELETE ASSIGNMENT INCLUDE SERVICES EXIT SAVE

ASSIGNMENT

SERVICES

BOOKING	PRODUCT	PAX	PU/DO DETAILS
☒ Brammield Mr L & Ms L USF1104703	AKL/TF/HMLA01/INTHOT International Airport to City Hotel	2	22-Apr-2025 10:50 22-Apr-2025 11:30 Arrive: NZ123 Crowne Plaza Auckland

SERVICE IN ASSIGNMENT

SERVICE LINE

☐ APPLY TO ALL SERVICES

PICKUP DETAILS

22-Apr-2025 10:50

Arrive: NZ123

DROP-OFF DETAILS

22-Apr-2025 11:30

Crowne Plaza Auckland

REMARKS

EDIT SERVICE DETAILS

REASSIGN SERVICE

ASSIGNMENT TOTALS

JOIN SERVICES

SUBSTITUTE SERVICES

ADULTS	2
CHILDREN	0
INFANTS	0
TOTAL PAX	2
SERVICES	1

Bookings

A list of bookings will appear for the services that have been selected for this assignment.

Product

Shows the service that has been selected.

Pick Up/Drop Off Details

The column within the booking list provides information that has been inserted into the booking for clients pick up and drop off information. This information can be amended by highlighting a booking in the booking list. When a booking/service is highlighted the pick up and drop off date, location, time and remarks fields will enable (to the right of the screen in the Service Line section). Allowing users to amend the information individually for each booking, or apply the amendment to all services.

Assignment Totals Section

Total pax numbers are provided per assignment, showing the number of services, adults, children and infants included in the assignment.

Join/Unjoin Services

The option to join or unjoin the services is available in the services tab. Information on joining and un-joining services is provided in the [Joining Services and Sharing Costs](#) procedure.

Substitute Services

The option of substitute the services is available in the service tab and information on substitution of services is provided in the [Substitute Service](#) procedure.

Deleting an Assignment

There may be occasions where assignments need to be deleted. Deletion of assignments can occur within the edit assignment screen. Once the assignment is deleted the system does not store deleted assignments for editing at a later date the assignment will be deleted from the system.

Delete an Assignment

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

If you want to keep the changes, click **OK**.

OK

3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the **Resource Assignment line**.

☐	START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS	DRIVER	VEHICLE	GUIDE
☐	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	IA	2	1	BB	MB1	

4. On the **Edit Assignment** screen, click **Delete Assignment**.

DELETE ASSIGNMENT

5. To keep the changes, click **Yes**.

YES

6. If you do not want to delete the assignment, click **No**.

NO

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: Assignment Category - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

NOTE: It is not necessary to define as many filters as we have in the example.

— RESOURCE ASSIGNMENT FILTERS

ALL ASSIGNMENTS WITHIN

22-Apr-2025

00:00

22-Apr-2025

23:59

ASSIGNMENT NAME

AKL Airport to Hotel

ASSIGNMENT STATUS

IA - Initial Assignment

VEHICLE

MB1 - Mercedes Benz Minibus JHT970

DRIVER

BB - Bob Brown

GUIDE

BOOKING NAME

BRANCH

Unassigned

DEPARTMENT

Unassigned

AGENT

CLEAR

OK

The more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assingnment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Print Manifest

A passenger manifest can be printed from within the assignment and will generate in a document such as the example below.

Global Services Test Trunk System Assignment Manifest by Service/Pickup

Name AKL Airport to Hotel
Status Initial Assignment
Start Date 22/04/2025 10:50:00
End Date 22/04/2025 11:30:00
Type Single Task
Driver BB Bob Brown
Vehicle MB1 Mercedes Benz Minibus JHT970

Booking Name	Reference	Adults	Children	Infants	Location	Supplier	Pickup Date	Dropoff Date	Branch	Department	Voucher
Barnfield M L & M L	USF1104703	2	0	0	AKL	Hellmark Limousines Ltd	22/04/2025 10:50:00	22/04/2025 11:30:00	USA Office	FTT	103,939
Pickup: Arrive: AKL Domestic Airport NZ123											
Dropoff: Crowne Plaza Auckland											

Report Parameters

Order By Service/Pickup
Show Pax No

Print a Manifest

- From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
- Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

If you want to keep the changes, click **OK**.

OK

- A list of existing Resource Assignments results will be returned and selection can be made by clicking on the **Resource Assignment line**.

☐	START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS	DRIVER	VEHICLE	GUIDE
☐	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	IA	2	1	BB	MB1	

- On the **Edit Assignment** screen, click **Print Manifest**.

PRINT MANIFEST

- On the Assignment Manifest screen, select **Order By** from the drop down selection.

- If you want to download the assignment manifest to a PDF document, click **Download PDF**.

DOWNLOAD PDF

- If you want to download the assignment manifest to a CSV file, click **Download CSV**.

DOWNLOAD CSV

- If you want to view the assignment manifest, click **View**. The manifest can be viewed and printed if required.

VIEW

9. If you do not want to view or download the assignment Manifest click **Exit**.

EXIT

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: Assignment Category - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking name

Individual clients can be found by using the booking name filter.

Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

It is not necessary to define as many filters as we have in the example.

- RESOURCE ASSIGNMENT FILTERS			
ALL ASSIGNMENTS WITHIN	22-Apr-2025	00:00	
	22-Apr-2025	23:59	
ASSIGNMENT NAME	AKL Airport to Hotel		
ASSIGNMENT STATUS	IA - Initial Assignment		
VEHICLE	MB1 - Mercedes Benz Minibus JHT970		
DRIVER	BB - Bob Brown		
GUIDE			
BOOKING NAME			
BRANCH	Unassigned		
DEPARTMENT	Unassigned		
AGENT			
CLEAR OK			

Fields with drop down selections will allow users to select from pre defined data, if the name is known or partially known users can begin to type the required text and use the drop down selection. Searching for data will then be refined to the text typed within these fields.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Printing Manifests by Assignment Category

With this feature enabled manifest reports can be produced per category providing a list of passenger arrival and departure information for each assignment. An additional filter field for Assignment Category will provide category specific results.

Assignment Manifest Screen

Assignment Manifests can be downloaded by selecting:

- » Download CSV or,
- » Download PDF.

Order By

There is flexibility to how the manifest can display information and selection to output the order can be by:

- » Service/Pickup.
- » Service/Drop-off.
- » Pickup/Service.
- » Drop-off/Service.
- » Driver.
- » Vehicle.
- » Guide.

Show Pax Check-Box

Users can also select to print individual passenger information by selecting the 'Show Pax' check box. Passengers full name (Title, Forename and Surname) will be included as well as the Passenger Type (Adult A or Child C) will show in the Pax Type column.

PDF Example - using Show Pax:

Global Services Test Trunk System
Assignment Manifest by Service/Pickup

Name AVL Airport to Hotel
Status Initial Assignment
Start Date 22/04/2025 10:50:00
End Date 22/04/2025 11:30:00
Type Single Task
Driver BB Bob Brown
Vehicle MB1 Mercedes Benz Minibus JHT970

Booking Name	Reference	Adults	Children	Infants	Location	Supplier	Pickup Date	Dropoff Date	Branch	Department	Voucher
Brammield Mr L & Ms L	USF104703	2	0	0	AKL	Hallmark Limousines Ltd	22/04/2025 10:50:00	22/04/2025 11:30:00	USA Office	FTT	103,939

Pickup: Arrive: NZ123
 Dropoff: Crowne Plaza Auckland

Title	Forename	Surname	Pax Type
Mr	Laney	Brammield	A
	Lee	Brammield	A

Report Parameters
 Order By: Service/Pickup
 Show Pax: Yes

CSV Example - using Show Pax:

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI		
1	Assignm	Status	Start Date	Start Time	End Date	End Time	Type	Noti	Booking	Nu	Reference	Adults	Children	Infants	Location	Supplier	Pickup Date	Pickup Time	Pickup	Dropoff Date	Dropoff Time	Dropoff	Details	Remarks	Branch	Departm	Voucher										
2	AKL Airp	Initial A	22/04/2025	10:50:00	22/04/2025	11:30:00	S				Brammield	USF104703	2	0	0	AKL	HMLAD	22/04/2025	10:50:00	Arrive	22/04/2025	11:30:00	Crowne Plaza Auckland	USA Office	FTT	103,939	BB	MB1	Ms	Laney	Brammield	A	Mr	Lee	Brammield	A	
3																																					

Bulk Update

There may be situations that you will need to do a bulk update of Assignment details, this could be a bulk update of assignment status for example.

Multiple Assignments can be selected, and updated in bulk. The procedure below describes how to update multiple assignments in bulk.

Bulk Update of Assignments

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

If you want to keep the changes, click **OK**.



3. A list of existing Resource Assignments results will be returned, selection can be made by checking the Resource Assignment lines and clicking, **Bulk Update**.

START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS	DRIVER	VEHICLE	GUIDE
☒	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	IA	2	1 BB	MB1	
☒	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Independent Services	IA	4	2 JH	MS1	

4. On the **Update Assignment** check the required fields that are to be updated.
NOTE: Fields that can be updated are *Assignment Status*, *Assignment Dates*, *Assignment Notes*, checking the box next to the field will enable entry into the fields and allow updates to be made.



The most common amendment will be updating the Assignment Status, or adding Assignment Notes.

In this example we have selected the Assignment Status check-box, we will update the status of these assignments to a Confirmed Assignment Status. The Assignment Dates and Assignment Notes will remain greyed out as we have not selected to update these fields.

Update Assignments
EXIT SAVE

☒ **ASSIGNMENT STATUS**

IA Initial Assignment
 KK Confirmed Assignment
 OS Out of Service
 RC Reconfirmed Assignment
 XA Cancelled Assignment

☐ **ASSIGNMENT DATES**

START DATE
 END DATE

☐ **ASSIGNMENT NOTES**

5. Check the **completed screen**.
6. Click **Save** to keep the changes.
7. Click **Exit** to discard any changes.
8. If **save** was selected a summary of the number of successful operations updated will show, click **OK**.

Summary

OK

NUMBER OF SUCCESSFUL OPERATIONS

2

9. The **Resource Assignment** screen will re-open.

In our example the Status of the assignments has been updated to KK.

☐	START DATE	END DATE	NAME	ASSIGNMENT TYPE	STATUS	PAX	BOOKINGS DRIVER	VEHICLE	GUIDE
☐	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Single Task	KK	2	1 BB	MB1	
☐	22-Apr-2025 10:50	22-Apr-2025 11:30	AKL Airport to Hotel	Independent Services	KK	4	2 JH	MS1	

10. Continue updating Resource Assignments by clearing and re-entering filter requirements from procedure 3. Or if Bulk Update of Resource Assignments is no longer required. Exit the module.

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: Assignment Category - This field is enabled if organisations are using multiple assignment categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date. This will produce results for all assignments (inclusive) within the dates defined.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

About Update Assignment Fields

Assignment Status

The selections available here have been pre-defined in Code Setup, this field shows the statuses of the assignment.

Start Date/End Date

The dates defined here will change the start date or end date of the assignments selected.

Assignment Notes

Note text can be entered and updated in bulk across multiple assignments.

Joining Services and Sharing Costs

Services across multiple bookings can share the costs associated with the services, you can select to join the services in the assignment. This can be done either when creating the assignment or at a later date when the assignment is edited.

The sharing of costs applies to non accommodation services only, and the services being joined must be for the same product. There is an option within the assignment selection where if the same product was not originally booked within an FIT or Group Booking the assignment will allow for the product to be substituted as the products need to be the same for the joint service function to operate. Instruction on [substituted services](#) is available.

When the services are joined within an assignment the services within the FIT or Group bookings are re-costed on the total cost of the pax on all services. The value is then prorated across all of the service lines across all bookings.

In this example we have a service that has a total value of \$250.00 the cost of this service is split between each booking. There is a total of 11 passengers using this transfer, the cost is \$22.72 per person and the system will automatically apply 2/11ths for Booking 1, 3/11ths for Booking 2, 2/11ths for Booking 3 and 4/11ths for Booking 4.

Transfer Total = 11 Passengers	Across 4 Bookings	Joint Service Value for each Booking
	Booking 1 	\$22.72 per Person = \$45.45
	Booking 2 	\$22.72 per Person = \$68.18
	Booking 3 	\$22.72 per Person = \$45.45
	Booking 4 	\$22.72 per Person = \$90.90



Services can be joined or un-joined within the assignment, the system will automatically apply the new service value within the FIT or Groups Booking and will also update the booking summary to reflect the changes.

The bookings are automatically updated within the costs screen with a shaded overridden value. Indicating that the cost of the service does not match the product cost because the bookings have been joined, and are now sharing the costs.

Before Services are Joined

In the example below you will see two bookings, one for Mr and Mrs Bolton and the other for Mr and Mrs Williamson. The first screen captures show the service costs before the service was joined.

Booking 1 - Pre-joined Service

Service Details

PREV

NEXT

CANCEL SERVICE

EXIT

SAVE

INTERNATIONAL AIRPORT TO CITY HOTEL (PRIVATE CAR)

Premium Vehicle

NB

MESSAGES

Service has assigned resources

1/10

22-Apr-2025

AKL / TF / HMLA01 / INTHOT

DETAILS

COSTS

PAX

ALLOCATION

VOUCHER TEXT

PICKUP/DROPOFF

NOTES

QUEUE ENTRIES

Bolton Mr P & Mrs K/A, Bolton Mr P & Mrs K/A

2 Adult(s) Per Vehicle Per Trfr

INTHOT

	VEHICL	TRFR	SCU FOC	COST RATE	OVERRIDE NZD	SELL RATE	OVERRIDE NZD
ADULTS	1	1	0	156.80	156.80	156.80	156.80
ADDITIONAL ADULTS	0			0.00	0.00	0.00	0.00
CHILDREN	0			0.00	0.00	0.00	0.00
INFANTS	0			0.00	0.00	0.00	0.00
TOTAL					156.80		156.80
TAX					20.45		20.45
TOTAL PER ADULT					78.40		78.40

Booking 2 Pre-joined Service

Service Details

PREV

NEXT

CANCEL SERVICE

EXIT

SAVE

INTERNATIONAL AIRPORT TO CITY HOTEL (PRIVATE CAR)

Premium Vehicle

NB

MESSAGES

Service has assigned resources

1/10

22-Apr-2025

AKL / TF / HMLA01 / INTHOT

DETAILS

COSTS

PAX

ALLOCATION

VOUCHER TEXT

PICKUP/DROPOFF

NOTES

QUEUE ENTRIES

Williamson/Mr/K, Williamson/Mrs/R

2 Adult(s) Per Vehicle Per Trfr

INTHOT

	VEHICL	TRFR	SCU FOC	COST RATE	OVERRIDE NZD	SELL RATE	OVERRIDE NZD
ADULTS	1	1	0	156.80	156.80	156.80	156.80
ADDITIONAL ADULTS	0			0.00	0.00	0.00	0.00
CHILDREN	0			0.00	0.00	0.00	0.00
INFANTS	0			0.00	0.00	0.00	0.00
TOTAL					156.80		156.80
TAX					20.45		20.45
TOTAL PER ADULT					78.40		78.40

After Services are Joined

You can see in the example below after the join service has been applied the costs have now been shared across the two bookings and the services have automatically updated. A message will display within the bookings service costs screen to say that the service has an assigned resource.

Booking 1 - Post-joined Service

DETAILS

COSTS

PAX

ALLOCATION

VOUCHER TEXT

PICKUP/DROPOFF

NOTES

QUEUE ENTRIES

Bolton Mr P & Mrs K/A, Bolton Mr P & Mrs K/A

2 Adult(s) Per Vehicle Per Trfr

INTHOT

	VEHICL	TRFR	SCU FOC	COST RATE	OVERRIDE NZD	SELL RATE	OVERRIDE NZD
ADULTS	1	1	0	0.00	87.36	156.80	156.80
ADDITIONAL ADULTS	0			0.00	0.00	0.00	0.00
CHILDREN	0			0.00	0.00	0.00	0.00
INFANTS	0			0.00	0.00	0.00	0.00
TOTAL					87.36		156.80
TAX					11.39		20.45
TOTAL PER ADULT					43.68		78.40

Booking 2 - Post-joined Service

DETAILS	COSTS	PAX	ALLOCATION	VOUCHER TEXT	PICKUP/DROPOFF	NOTES	QUEUE ENTRIES
Williamson/Mr/K, Williamson/Mrs/R				2 Adult(s) Per Vehicl Per Trfr			
INTHOT	VEHICL	TRFR	SCU FOC	COST RATE	OVERRIDE NZD	SELL RATE	OVERRIDE NZD
ADULTS	1	1	0	0.00	87.36	156.80	156.80
ADDITIONAL ADULTS	0			0.00	0.00	0.00	0.00
CHILDREN	0			0.00	0.00	0.00	0.00
INFANTS	0			0.00	0.00	0.00	0.00
TOTAL					87.36		156.80
TAX					11.39		20.45
TOTAL PER ADULT					43.68		78.40

The procedure below will help you to join services for existing assignments. If the assignment has not yet been created, follow the [New Assignment](#) procedure to create the assignment.

Join Services

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. Expand the Resource Assignment Filters by clicking the +. Select the required filters to narrow the results for resources that have already been assigned.

If you want to keep the changes, click **OK**.

OK

3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the Resource Assignment line.
4. On the **Edit Assignment** screen select the **Service Tab** and use the check boxes to select the required service options to join.
5. Click **Join Services**.

JOIN SERVICES

6. Confirm the linking of joined services.
7. To keep the changes, click **Yes**.

YES

8. To discard any changes, click **No**.

NO

Unjoin Services

Services within the assignment can be un-joined if the joined services are no longer required, when services are un-joined the services within each booking will return to the product cost price stored in the system and the booking summary will also be updated.

To un-join the services follow the above procedure, when you get to Step 5, click **Unjoin Services**.

UNJOIN SERVICES

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: Assignment Category - This field is enabled if organisations are using multiple categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment statuses can be selected from a pre-defined list providing results based on an assignment status.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here and any pre-selected resources will display. Results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by branch or department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

It is not necessary to define as many filters as we have in the example.

The screenshot shows a 'RESOURCE ASSIGNMENT FILTERS' panel with the following fields:

- ALL ASSIGNMENTS WITHIN:** Two date and time range selectors. The first is set to '22-Apr-2025' from '00:00' to '23:59'. The second is also set to '22-Apr-2025' from '00:00' to '23:59'.
- ASSIGNMENT NAME:** A text input field containing 'AKL Airport to Hotel'.
- ASSIGNMENT STATUS:** A dropdown menu with 'IA - Initial Assignment' selected.
- VEHICLE:** A dropdown menu with 'MB1 - Mercedes Benz Minibus JHT970' selected.
- DRIVER:** A dropdown menu with 'BB - Bob Brown' selected.
- GUIDE:** An empty dropdown menu.
- BOOKING NAME:** An empty text input field.
- BRANCH:** A dropdown menu with 'Unassigned' selected.
- DEPARTMENT:** A dropdown menu with 'Unassigned' selected.
- AGENT:** An empty dropdown menu.

At the bottom right of the filter panel are 'CLEAR' and 'OK' buttons.

However, the more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Substituting Services

Services can be substituted allowing for a service in a booking to be substituted for another services. This can occur within a booking, or within an assignment. The same result is achieved if the service was deleted in a booking and another service inserted in its place.

Substitute Services

1. From the Home menu, select **Home > Operations > Service Operations > Resource Assignment**.
2. Expand the Resource Assignment Filters by clicking the - Select the required filters to narrow the results of the resources already assigned.

If you want to keep the changes, click **OK**.



3. A list of existing Resource Assignments results will be returned and selection can be made by clicking on the Resource Assignment line.
4. On the **Edit Assignment** screen select the **Services Tab**, highlight the booking and click **Substitute Services**.



5. The **Product Substitute** service screen will open, select the service using the check box next to the required service, and select a new substitute product *Location, Service, Supplier, and (Product) Code*.

NOTE: The product description and comment field (if used) will populate in the grey fields below the code field if the product exists.

✓	LOCATION	SERVICE	SUPPLIER	CODE	DESCRIPTION
✓	AKL	TF	HMLA01	INTHOT	International Airport to City Hotel (Private Car)

PRODUCT SUBSTITUTE

LOCATION
AKL - Auckland

SERVICE
TF - Transfer

SUPPLIER
SUSA01 - Supershuttle

CODE
APTHOT

Airport to Hotel Shuttle Tra

Meet/greet Not Incl

OPTIONS

SERVICE STATUS
(Default)

☒ RETAIN SELL PRICE
☒ RETAIN VOUCHER TEXT
☒ RETAIN PU/DO

6. Keeping with the **Substitute Services** screen, select a *Service Status*, and use the check boxes to select the required options if you want the substitute service to; *Retain (the original) Sell Price*, *Retain (the original) Voucher Text*, or *Retain (the original) Pick up/Drop off details*.

OPTIONS

SERVICE STATUS
(Default)

☒ RETAIN SELL PRICE
☒ RETAIN VOUCHER TEXT
☒ RETAIN PU/DO

7. Check the **completed screen**.
8. Click **Save** to keep the changes.
9. Click **Exit** to discard any changes.
10. If **Save** was selected a Summary of Substitute Services will display with the Number of Successful Operations, click **OK** to clear the screen.

About Filter Headings

All Assignments Within

A date or range of dates can be entered to filter for a specific date or range of dates.

NOTE: Assignment Category - This field is enabled if organisations are using multiple categories to assign their services to more than one assignment.

Assignment Name

The name given to the assignment, results can locate specific assignments by name.

Assignment Status

Specific assignment status can be selected from a pre-defined list of status providing results for specific statuses.

Allocated Vehicles, Drivers and Guides

Drop down selection of available resources can be selected here, and any pre-selected resources will display, results can be filtered by Vehicle, Driver and or Guide.

Booking Name

Individual clients can be found by using the booking name filter.

Branch/Department

Bookings with specific booking branch or booking department can be found when filtering by Branch or Department.

Agent

Users can filter assignments by agents attached to bookings.

In this example we have narrowed the search by selecting a specific date, the name of the assignment, the status of the assignment, and we have even defined the vehicle and driver.

It is not necessary to define as many filters as we have in the example.

RESOURCE ASSIGNMENT FILTERS

ALL ASSIGNMENTS WITHIN

22-Apr-2025

00:00

22-Apr-2025

23:59

ASSIGNMENT NAME

AKL Airport to Hotel

ASSIGNMENT STATUS

IA - Initial Assignment

VEHICLE

MB1 - Mercedes Benz Minibus JHT970

DRIVER

BB - Bob Brown

GUIDE

BOOKING NAME

BRANCH

Unassigned

DEPARTMENT

Unassigned

AGENT

CLEAR

OK

The more filters used the fewer results will be returned.

About Result Columns

Start Date/End Date

Assignment start/end date and time.

Name

The name given to the assignment.

Assignment Type

Single Task, Independent Service, or Hop on Hop off.

Assignment Status

Specific assignment status for the assignment.

Pax

Number of pax included in the assignment.

Bookings

Number of bookings included in the assignment.

Allocated Drivers, Vehicles and Guides

Resources assigned.

Bulk Service Insert

This feature allows users to insert a service into multiple bookings using a bulk service insert process. Filters are applied to display a list of booking results, allowing users to manage the insert of a service into selected bookings.

Users can view standard product options and select one product at a time to insert. The day sequence must be specified for the search, which will then be used to insert into each booking based on the day number. When the "Add Service" operation is performed, it is inserted using the Day and Sequence number from the initial selection.



For group bookings with more than one itinerary, users can select an itinerary to insert the service. When multiple bookings are selected the data is automatically populated from the first booking selected. Any pricing or rate values are generated based on the Pax details from the first selected booking.

Bulk Service Insert

1. From the Home menu, select **Home > Operations > Service Operations > Bulk Service Insert**.
2. On the blank **Bulk Service Insert - Manual Selection** screen, the **Booking Tab** opens. Complete the fields necessary to filter a list of Booking results.

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

3. Keeping with the **Booking Tab**, Bookings can be filtered by 'Booking Status', 'Branch' and or 'Department'. If applicable, select the required filters.

Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.

BOOKING STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ ADMINISTRATION	☒ ADMINISTRATION
☒ CANCELLED WITH COST	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ CONFIRMED	☒ BALANCE SHEET	☒ FIT
☒ DEPOSIT INVOICE	☒ NZ OFFICE	☒ GROUPS
☒ FINALISED	☒ ONLINE SALES	☒ INCENTIVES
☒ INVOICED	☒ UNASSIGNED	☒ INTERNET FIT
☒ QUOTATION	☒ USA OFFICE	☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS
		☒ UNASSIGNED

4. Click on the **Analysis Tab**, selection of current Bookings can also be made from 6 of the Booking Analysis Codes. If required select the applicable 'Analysis Codes'.

Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.

- Click on the **Service Tab**, select a *Service Date From/To*, *Supplier*, *Master Supplier*, or *Location* to filter Bookings with specific Services.

- Keeping with the **Service**, Bookings can be filtered using *Service Status*, *Service Type*.

Service Tab

Filters used in this screen capture are examples used for Training purposes, Service Status, Service Type selection will reflect users own organisational fields.

- Check the **completed screens**.
- Click on the **Results Tab**. Select the Bookings using the 'Selected check boxes' next to each Booking, or use 'Select All'.

NOTE: The Insert Button will become active when Bookings are selected.

BOOKING		ANALYSIS		SERVICE		RESULTS	
SELECTED		0		FOUND		3	
						SELECT ALL	
						UNSELECT ALL	
	BOOKING NAME	CONSULTANT	BOOKING REF	TRAVEL DATE	AGENT	LAST SERVICE DATE	STATUS
	Cultuur Vakanties Group 010625	PNJ	NZSE104723	01-jun-2025	RDHHAG	10-jun-2025	Quotation
	Cultuur Vakanties Group 080625	PNJ	NZSE104725	08-jun-2025	RDHHAG	17-jun-2025	Quotation
	Cultuur Vakanties Group 050625	PNJ	NZSE104726	15-jun-2025	RDHHAG	24-jun-2025	Quotation

9. Click **Insert** to add a new entry.

INSERT

10. On the blank **Service Line Insert** screen, select a 'Location' or 'Supplier' and a 'Service Type' to search for Product.

NOTE: To insert the service mid itinerary adjust the Day/Seq fields to show the correct values, the Service Date will update if Day/Seq fields are edited. If the Service Date is edited the Day/Seq will automatically update.

Service Line Insert

EXIT

SELECTION

RESULTS

ALL SERVICES

ACCOMMODATION

ACTIVITY

CANCELLATION FEE

CRUISE

ENTRANCE FEE

FLIGHT

GUIDE

ITINERARY TEXT

MEAL

PACKAGE

RENTAL VEHICLE

SIGHTSEEING/DAY TOUR

SUNDRY

SURCHARGE FEE

TRANSFER

TRANSPORT

DAY/SEQ. 1 / 40

SERVICE DATE 02-Jun-2025 Monday

SCU 1

COUNTRY

DESTINATION

LOCATION

SUPPLIER

CODE

FIND PRODUCTS

+ PRICE CODE

11. Click **Find Products**.

FIND PRODUCTS

12. On the **Results** tab, select the service to insert into the Bookings.

SELECTION

RESULTS

	INSERT	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	AVAILABLE	RETAIL	AGENT
	INSERT	Surcharge Fee	Willowbank Wildlife Reserve	Wildlife Surcharge		RQ		10.00	10.00

13. Click **Insert** to add a new entry.

INSERT

14. The **Service Line Details** screen opens with the Product Selected, check the completed screen. If pickup and drop off details are known they can be edited here.

Service Line Details EXIT SAVE

PRODUCT SELECTED
CHC / FE / WWRC01 / FEE
Product Selected (Christchurch.Surcharge Fee):
Willowbank Wildlife Reserve, Wildlife Surcharge.

SERVICE INFORMATION

BOOKING DETAILS
DAY/SEQ. 1 50
IN DATE 01-Jun-2025 Sunday 00:00
DAY 1
SERVICE STATUS (Default)
SUPPLIER CONF.
MAIN SERVICE PRICE: 200.00 NZD
VOUCHER PICKUP

15. Click **Save** to keep the changes.
16. Click **Exit** to discard any changes.
17. If '**Save**' was selected a Summary will appear with the number of successful Bookings updated.

Summary OK

BOOKING NAME	REFERENCE	TRAVEL DATE	CONSULTANT
Cultuur Vakanties Group 010625	NZSE104723	01-Jun-2025	PNJ
Cultuur Vakanties Group 050625	NZSE104726	15-Jun-2025	PNJ
Cultuur Vakanties Group 080625	NZSE104725	08-Jun-2025	PNJ

18. Click **OK** to exit the modal.

About Bulk Service Insert Fields

There are some additional considerations with using this bulk service insert feature.

- » Package and non-accommodation package products cannot be inserted into multiple bookings.
- » External Services are unable to display in the Insert Service Results screen and therefore cannot be inserted into multiple bookings.
- » If a product rate has a Split Service, Rate Category for cross seasonal bookings - the bulk service insert process will insert a single service for the entire stay length.

Booking Tab

This is the default tab that will open when selecting to insert a service within multiple Bookings in a bulk update process.

Travel Date From/To

Travel Date for Bookings is the date that appears in the header of a Booking, this is generally the date of the first service. This date range field is used to select Bookings with a specific date, or a range of travel dates.

Agent From/To

Used to select Bookings with a specific, or range of, agent(s) codes in the Booking header matching the selection.

Master Agent From/To

This selection is used to filter Bookings with a specific, or range of, Master Agent(s) codes in the Booking header matching the selection.

Date Entered From/To

This is the date the Booking was created. If selection for a range of dates is entered here Bookings that were created within the date range provided will be display in the results screen.

Booking Types

» Defaults to Groups - those bookings that are Group bookings will be selected.

Consultant

Selecting this field will filter Bookings by the consultant code attached to the Booking.

Reference

Used to select a specific Booking reference.

Booking Status

By default, all Booking statuses are checked and bookings that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all Booking branches are checked bookings that have those branches will be selected.

Department

By default all Departments are checked, bookings that have those branches will be selected.

Analysis Tab

Booking Analysis

The top two rows of this tab are the 6 Booking Analysis codes. These are Booking header level Analysis selections.

Service Tab

Service Date From/To

This is the date of the service within a Booking. If selection for a range of dates is entered here Bookings with services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Bookings with a specific, or range of, supplier(s) codes matching the selection.

Master Supplier From/To

This selection is used to find Bookings with a specific, or range of, Master Supplier(s) codes matching the selection.

Location

Use this field to find Bookings with services in the itinerary for a selected location.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Results Tab

Selected check boxes

Bookings can be individually selected.

Selected/Found Fields

These fields are non editable fields, which provide a tally of the results found, and the Bookings selected.

Select All/Unselect All

Select all Bookings found, or un-select all Bookings selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Bulk Service Insert (PCM), see ["Booking Operations" on page 226](#).

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Service Line Insert

All Service Types

An alphabetic list of services types to choose from when searching the product database. Click on a service type to highlight it (i.e. to select it). One or more service types can be selected and all matching products found will be returned in the Results tab.

Day/Seq.

For the first service to be entered into the Booking, this defaults to Day 1, Sequence 10. As services are added within each day of the Booking itinerary, Tourplan increases the sequence number by 10. The day and sequence number can be used to change the order of service lines within a Booking.

NOTE: Incrementing the Sequence number in 10s, allows new services to be inserted in-between existing services on the same day as those that have already been added to the Booking. A drop-down arrow next to the sequence field when selected provides a list of existing services allowing users to locate the point within the Booking that they may want to insert the new service. The system will then allocate the correct day sequence number.

Service Date

The date being entered here is the date of the service to be selected and inserted into the Booking. The date can be changed for each service by typing a new date or using the drop-down calendar. Changing the date will automatically change the Day number. Alternatively, the Day number can be used to change the date. The day of the week will automatically update to reflect any change in the date.

Time: If a time of arrival is known, it can be entered here. If entered here, the time will transfer into the Pickup field when selecting the Pickup Button.

NOTE: Once the service is saved editing or updating a time can occur within the service line Pickup/Dropoff tab within the service details or from the Itinerary Menu > Pickup/Dropoff.

The value in this field quantifies the number of product Second Charge Units.

Once a product is selected, the SCU gets a label, which comes from the Second Charge Unit description in the Product Database.

For example, the supplier **SCEN01 - Johnstons Scenic Coachlines**, out of **AKL - Auckland** has two product offerings; a charter service and an intercity service. These are found in the Product Database via *Home > Products > Product Setup (Price Rules tab)*.

For the charter service, the First Charge Unit is **Coach** and the Second Charge Unit is **Tour**, so this service will have an SCU label of **Tour** on the Service Line Insert screen when it is selected.

Conversely, the intercity service will have an SCU label of **Trip**, which is how the service is charged.

NOTE:

- » **Accommodation** - the FCU is Room, and the SCU is Night, so the is the number of Nights required.
- » **Non-accommodation** - e.g. for , the FCU is , the SCU is , so the quantity required is . The system knows (from the product setup) how many people the can take and, if the number of people exceeds the available size, the system will automatically adjust the number of FCUs () to suit so, in this example, .

Country

The Country where the service takes place or originates. Not all users will see this field, this is determined by each user company's procedures as to if this field is required.

Destination

The Destination where the service takes place or originates. Not all users will see this field. It will depend if user company's requirements.

Location

The location where the service takes place or originates.

Supplier

Used in conjunction with Service Type, Location and Code fields to search the product database.

Code

Used in conjunction with Service Type, Supplier and Location fields to search the product database.

NOTE: In addition to Service Type (which defaults to *All Service Types*), with any one of either Location, Supplier or Code, the **Find Products** green button is highlighted. The more codes that are filled in when searching for products in this screen, the more accurate and filtered the results.

Price Code (+ to expand)

There are 4 selections available each of which defines how the system will handle rate retrieval and possible re-calculations for this service.

System Price Code - this selection allows the system to handle selection of the price code. This means when the package is booked, the price code will be re-evaluated using the booking agents attached price code hierarchy without honouring the original price code used in the package service line. The System Price Code selection will ensure the package service will be booked using a price code available to the agent.

The remaining selections are:

- » All Price Codes
- » Applicable Price Codes
- » Selected Price Codes - where a nominated price code can be selected

Selecting one of the remaining three options, will override the system selection defining this price code to be the highest priority. This will generally only be applicable if you require a package to always be booked using a specific price code over the agent price code defaulting logic.

Insert Service Line Results

The Results tab shows a list of all products found that match the selection criteria. Products are presented in list form under the following columns.

NOTE: All scrollable lists can have columns added or removed per user (i.e. you can change the default columns that appear in your view of the list). Click on a space in between two column labels (if you click on the label itself, the scroll will re-sort based on the column clicked on). The list of available column names will display and they can be check-box selected/deselected. The width can also be set, as can normal or bold font.

Filter Button

The results tab provides users with an additional filter option, products and services can be filtered by class, locality or attached amenities.

NOTE: *This is dependant on if user company's procedures have selected to use these fields in their product setup.*

Consultants can also define a rate price range for results to return based on minimum and maximum agent values.

Search Icon

There is a search icon located next to the column 'Book' heading. This allows users to quickly search the Product Search application for an existing entry. An additional search field will enable users to insert text to

search, and previous and next (arrow buttons) identify entries which match the search criteria.



The Enter key can be used as a quick key to move to the next matched searched result.

Insert

A button labelled Insert allows the service to be inserted into the selected bookings or PCMs.

Location Name

Full name of the location where the service is provided.

Service Name

Full name of the service (from the Selection tab under *All Services*).

Name

Full name of the service supplier.

Description

A drill-down link to further information about the service, including *Rates* and *Notes*. Book and Hold buttons are also available on the drill-down screen (albeit coloured blue, rather than green and grey).

This example shows a property that has FYI message information, and shows the amenities available at the property. Clicking on the other tabs within this screen will allow users to see further detail.

INFORMATION

RATES

ALLOCATION

NOTES

FYI

MESSAGE

VALID FROM

EXPIRES

PUBLIC

RWC rates may apply - see RWC terms & conditi...

02-Sep-2025

31-Oct-2025

✓

>

AMENITIES

Hotel Facilities

✓

24 Hour Room Service

✓

Business Centre

✓

Car Park - Charges

✓

Laundry Facilities

✓

Restaurants & Bars on Site

Recreation & Fitness

✓

Sauna

Room Facilities

✓

Air Conditioning

✓

Internet Access

Comment

A further field that is sometimes used as an extra descriptive field for product, or for an internal note. An example could be for accommodation services, where this organisation uses the comment field to show meal inclusions - Includes light continental breakfast.

Class

For accommodation services, this label identifies the class of accommodation; e.g. 4-Star, 5-Star, Backpackers, Luxury Boutique etc.

Sell

The cost price in the Product Database, plus markups (regardless of source), less agent commission.

NOTE: It is possible that the same product displays multiple times. This is because of INI settings that determine what is to display by default. Where the same product is displayed multiple times, it is once for each price code that has been set up against the date range for the product.



"Booked" is not Saved

It is important to remember that, when viewing a list of results (or any aspect of a service within these tabs), the service has *not yet been inserted into the* , even if **"Book"** has been clicked. The tabs are available to refine selections and to inquire on various aspects of a service. Services are not saved into the until the Insert New Service process is complete, which requires each service

A full list of field columns available within the Results tab is available [Service Line Insert \(Service Scroll Headings\)](#).

Summary

A summary of the Booking Bulk Service Insert process is displayed to inform users of successful service insertion. Additional tabs highlight Bookings that require further attention to add a new service or indicate if an error has occurred.

Summary Modal displays three tabs:

- » **Successful** - where the total number of processed Bookings is displayed in the bottom left corner of the Modal. The number of Bookings successfully updated displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, and Travel Date.
- » **Attention Required** - where the number of Bookings requiring attention displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, Travel Date, Rate Status, and a Message column indicating the attention required. For example: Rates have expired, a cross season rate, a sequence number changed, allocation status.
- » **Errors Encountered** - where the number of Bookings that the service line was unable to be added to the Booking displays next to the tab heading, and a list of Bookings is shown, including the Booking Name, Consultant, Reference, Travel Date, Rate Status, and a Message column indicating the error. For example: no available sequence number for the relevant day, product not allowed to be used on that day.

Save Bulk Service Insert Filters

Common or frequently used Bulk Service Insert Filters can be saved and given a Description so that repeatable tasks can be easily accomplished.

Bulk Service Insert

1. From the Home menu, select **Home > Operations > Service Operations > Bulk Service Insert**.

2. Click **Manual**.



3. On the blank Bulk Service Insert - Manual Selection screen, the **Booking Tab** will open, select the required filters from the field selections, and tabs available.

View ["About Bulk Service Insert Fields" on page 199](#) to learn more about all field selections available, or view the individual tab filters; ["PCM Tab" on page 199](#), ["Analysis Tab" on page 200](#) (Booking), ["Service Tab" on page 200](#), or ["Results Tab" on page 200](#).

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



7. On the empty **New Selection** screen, give the Saved Filter Selections a 'Description'.



8. Click **Add** to add this filter description.



9. Click **Exit** to discard any changes.
10. **NOTE:** If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Service Insert. If selected for future Bulk Service Insert processing, results will be returned based on the saved filters.

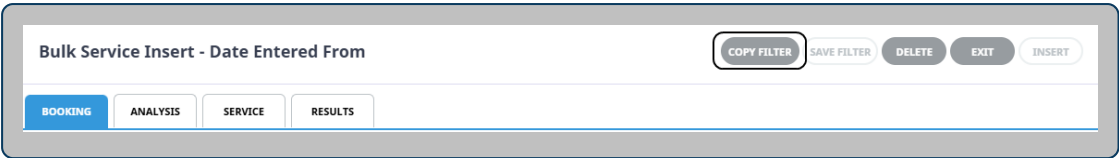


The procedures just described are sufficient to create manual filter criteria to manage Bulk Service Insert features - saving filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the [System Setup User Manual](#).

Copy Bulk Service Insert Filters

There may be times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the Bookings Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Bulk Service Insert Filters

Deletion of Filter Descriptions is allowed, to be able to manage currency of tasks and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to delete, the filters will not be able to be retrieved again.



CHAPTER 5

PCM Operations

PCM Operations is an application that contains Bulk PCM Operation utilities. Not all companies will use all of these functions: usage will be dependent on which aspects of the Tourplan system a particular company has a need for.

Services can be substituted, and bulk replacement of one service in a range of PCMs with different services can be completed. There is also a feature available to Update Pickup and Drop off service information for PCMs in a bulk update process. Recalculation of PCM Quotes, PCM Packages or Itinerary Services can be done in bulk from the PCM Operations applications.

Operations also offers PCM Status Update function where filters can be set to view PCMs and a bulk PCM Status can occur.

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Bulk Service Insert	196
Save Bulk Service Insert Filters	203
PCM Status Update	205
Recalculate All PCM Quotes	209

Substitute Service

The Substitute Service facility allows a service to be replaced in PCM Quotes & PCM Packages, in bulk, with an alternative service, without having to open each PCM individually.

This can be useful when (e.g.) a decision has been made not to use a particular service from a certain date, and an arrangement has been made to use another service from that date. Similarly if a generic supplier is used to build and cost series tours and a supplier is substituted when final numbers are known, a replacement service can be entered into the PCMs in bulk.

NOTE: Services will not be substituted if:

- » The replacement service is the same as the original service.
- » The service category is different from the original service category.
- » The location of the service is different from the original service location.
- » The original service has a Special Offer Fixed Nights or Extra Nights service.

Packaged Services will not substitute if:

- » A selected service is in a PCM package, and the replacement service is not set up in the package as a valid substitutable service.
- » The package header does not allow substitute services.
- » A Non-Accommodation Package replacement service is a non non-accommodation service type.

Substitute PCM Service

1. From the Home menu, select **Home > Operations > PCM Operations > Substitute Service**.
2. On the blank **Substitute Service** screen, the **Filter Tab** will open, in the 'Current Service' section, select the *Location, Service, Supplier*, and enter the *Service Code*. Select the required *Service Date From/To* dates.

NOTE: All 'Current Service' fields are to be completed, manual entry of the Service type is required, the Description and Comment fields from the product option will populate if a valid service has been selected. The PCM Filter **Service Date From/To** fields are mandatory, the Results tab will not return results until these two fields have dates applied.

3. Keeping with the **Filter Tab**, services to be substituted can be filtered using *PCM Status, Service Status, Branch* and or *Department*. If applicable, select the required filters.

Filter Tab

Filters used in this screen capture are examples used for Training purposes, Status', Branch and Department selection will reflect users own organisational fields.

PCM STATUS	SERVICE STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ OPTIONAL SERVICE	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ MASTER	☒ PACKAGE SERVICE	☒ NZ OFFICE	☒ FIT
☒ PACKAGE	☒ QUOTE ONLY	☒ USA OFFICE	☒ GROUPS
☒ QUOTE			☒ INCENTIVES
			☒ INTERNET FIT
			☒ SERIES TOURS
			☒ SHORE EXCURSIONS
			☒ SPECIAL GROUPS

- Click on the **Analysis Tab** a selection of current services can also be made from 6 of the PCM Header Analysis Codes. If required select the applicable *Analysis Codes*.

Analysis Tab

Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.

FILTER

ANALYSIS

RESULTS

PCM TYPE

MARKUP TYPE

☒ ALL
☒ CONFERENCE
☒ FAM TRIP
☒ INCENTIVE
☒ PACKAGE
☒ SERIES
☒ SPECIAL INTEREST
☒ TAILOR MADE/BESPOKE

☒ ALL
☒ MANUAL
☒ STANDARD
☒ UNASSIGNED

- Check the **completed screens**.
- Click **Ok** or click on the **Results Tab**. Select the services using the **Select check boxes** next to each service, or use **Select All**.

NOTE: The Substitute Service check box will become active when services are selected.

Substitute Service EXIT OK

FILTER

ANALYSIS

RESULTS

	LOCATION	SERVICE	SUPPLIER	CODE	DESCRIPTION	PCM NAME
☐	AKL	GU	GUIDE1	GUIDE1	Guide to be confirmed	8 Night North Island Series T...
☐	AKL	GU	GUIDE1	GUIDE1	Guide to be confirmed	8 Night North Island Series T...

☐ SUBSTITUTE SERVICE

SERVICE LINES
 PICKUP DETAILS
 00:00
 DROP-OFF DETAILS
 00:00
 REMARKS

PICKUP/DROP-OFF
 FOUND 2
 SELECTED 0

- Click **OK** to keep the changes and save or update the entry.
 - On the blank **Replacement Service** screen, select the *Location*, *Service*, *Supplier*, and enter the *Service Code* for the Replacement Service.
- NOTE:** All 'Replacement Service' fields are to be completed, entry of the (product) Code is required. The Description and Comment fields from the product option will populate if a valid product has been selected.
- If required un-select *Retain Sell Price*, and *Retain Voucher Text* check boxes.

NOTE: By default the **Retain Sell Price** and **Retain Voucher Text** check boxes are selected, users are to un-select if the replacement service is **not** to use the current service sell price or voucher text attached to the service itself or product rate.

11. Keeping with the **Replacement Service** screen, select **Service Status**.
12. Click **OK** to keep the changes and save or update the entry.
13. Click **Exit** to discard any changes.
14. If **OK** was selected a Summary will appear with the number of successful services to be updated.

15. **Substitute Service Results** screen will re-display select **Exit** to close.

About Substitute Service Fields

Filter Tab

This screen is in two sections. The top section includes 'Current Service' field selections and 'PCM Filter' selections. The bottom section includes options to select PCM Status, Service Status, Branch and or Department.

Current Service Fields

The 'Current Service' selection, uses drop downs to select Location, Service, Supplier code for the service that is to be replaced. The (product) Code is to be inserted manually.

When a valid service has been selected the grayed fields below the Code will populate with the product description, and comments - if used for the service.

NOTE: If data does not display in the fields below the Code then incorrect detail has been entered.

PCM Filter

Service Date From/To

The selected current service can be filtered based on the date of the service.

Agent From/To

Services in PCMs with a specific agent or range of agents can be selected.

PCM Status

Check the boxes alongside the PCM status(es) which are to be included in the filter. e.g., if PCM's with a cancelled status are not to be included, uncheck the cancelled status checkbox.

Service Status

Check the boxes alongside the service status that are to be included in the filter. For example, if PCMs with a 'Master' status are not to be included, uncheck the Master status checkbox.

Branch

If only PCMs with specific Branch(s) need to have the service substituted, check the appropriate box(es).

Department

If only PCM's with specific Department(s) need to have the service substituted, check the appropriate box (es).



If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab (PCM Analysis)

Analysis Codes

The selection of the current service can also be made based on the six PCM header Analysis Codes.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or check boxes, see the [System Setup User Manual](#).

Results Tab

Selected check boxes

Services can be individually selected.

Select All/Unselect All

Select all services found, or un-select all services selected.

Service Lines

Pickup and Drop-Off details will display if the service has this information previously attached to the service. The pick up and drop off information can be updated here by completing the required fields and selecting 'Edit Details'.

Found

The system will provide you with the number of services found, matching the filter criteria.

Selected

A numerical value showing the number of services that have been selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Substitute Services, see ["Booking Operations" on page 226](#).

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Replacement Service Selection

These fields are where the detail of the replacement service is entered.

Use the drop-downs or enter the codes to select the Location, Service and Supplier of the replacement service to be used. Enter the (product) Code manually.

NOTE: If data does not display in the fields underneath the drop-down or (product) Code field(s), incorrect detail has been entered—i.e., the (product) Description should display underneath the (product) Code field.



PCM Replacement Service considerations:

- » All pax range and supplement costs revert to the original PCM Header values.
- » Staff counts are assessed based on the setup of the replacement product rules.
- » If the sell price is retained then the Agent/Retail price is unchanged regardless of changes to the pax configuration values.
- » If the service includes extras the substituted service will inherit the pax values from the PCM Header.

Service Status

This field is set to 'Default', however if a service status is selected here the system will update the service status in the PCM(s) at the time of replacing the service.

Retain Sell Price

When checked, the system will adjust the cost price of the service in the PCM to reflect the cost price of the replacement service. However, the sell price from the current service will be held against the replacement service. This feature is useful when an original selling price of PCM needs to be maintained.

Retain Voucher Text

When checked, any voucher text (entered at either service or rate level) will be written into the replacement service line. This feature is useful if PCM specific voucher text has been entered against the current service and these details are the same for the replacement service.

Enter Pickup/Drop-off Details

Existing pick up and drop off details will store within the replaced service if the pick up and drop of fields were used in the initial PCM.

NOTE: To amend pick up and drop off details for the substituted service select the 'Enter Pickup/Drop-off Details' check box and insert information into the; Pick up Time, Pick Up Text, Drop off Time, Drop Off Text, and Remarks text. This information is then be updated alongside substituted service pick up/drop off fields within the PCM.

Update Pickup & Dropoff

Bulk updates to pick up and drop off times for services can be achieved when using the PCM Operations function Update Pickup and Drop off. Some organisations may need the facility to locate or update a number of PCMs at once.

The Update Pick up/Drop off menu option allows users to set filter options to return required results, and amendment to pick up/drop off points or times can be performed to multiple services across multiple PCMs.

Updating (PCM) Pick Up & Drop Off Ddetails

1. From the Home menu, select **Home > Operations > PCM Operations > Update Pickup and Dropoff**.
2. On the blank **Update Pickup/Dropoff** screen, the **Service Tab** will open, select fields to narrow the search filter results.

NOTE: 'Search' will enable when the Service From/To fields have dates are selected. Further filter selections are available from the following tabs *PCM Tab*, *Analysis Tab* (PCM), *Service Tab* and *Analysis Tab* (Product).

Update PCM Pickup/Dropoff

EXIT DISCARD SAVE SEARCH

PCM ANALYSIS **SERVICE** ANALYSIS RESULTS

SERVICE DATE FROM

SERVICE DATE TO

SUPPLIER FROM

SUPPLIER TO

CODE FROM

CODE TO

PICKUP TIME RANGE 00:00 23:59

PICKUP REMARKS

SERVICE REMARKS

MASTER SUPPLIER FROM

MASTER SUPPLIER TO

LOCATION

DROPOFF TIME RANGE 00:00 23:59

DROPOFF REMARKS

SERVICE STATUS

☒ ALL

☒ AMENDED FROM KK

☒ AMENDED FROM RQ

☒ AMENDED FROM WL

☒ CANCELLED

☒ CANCELLED - CHARGE

☒ CANCELLED EXTERNALLY

☒ CONF FROM ALLOCATION

☒ CONFIRMED

☒ CONFIRMED EXTERNALLY

☒ CONFIRMED FREESALE

☒ INITIAL STATUS

☒ ITNERARY ONLY

☒ NOT BOOKED

SERVICE

☒ ALL

☒ ACCOMMODATION

☒ ACTIVITY

☒ CANCELLATION FEE

☒ CRUISE

☒ ENTRANCE FEE

☒ FLIGHT

☒ GUIDE

☒ ITINERARY TEXT

☒ MEAL

☒ PACKAGE

☒ RENTAL VEHICLE

☒ SIGHTSEEING/DAY TOUR

☒ CHAIRMAN

3. Check the **completed screens**.
4. Click Save, or click on the **Results Tab**. Select the services to update. There are three ways to select:
 - a. Using the **check-box**.
 - b. Or clicking on the **PCM Service**.
 - c. If all PCM services listed are to be updated, use **Select All** for bulk selection.

Update PCM Pickup/Dropoff

EXITDISCARDSAVESearch

PCM

ANALYSIS

SERVICE

ANALYSIS

RESULTS

PCM	PRODUCT	PAX PU/DO DETAILS
☐ 8 Night North Island Series Tour 100037	NPE/ME/RESTR1/REST2 Restaurant to be confirmed	05-Jun-2025 05-Jun-2025
☐ 8 Night North Island Series Tour 100039	NPE/ME/RESTR1/REST2 Restaurant to be confirmed	12-Jun-2025 12-Jun-2025

> SELECT ALLUNSELECT ALL

☐ SELECT SERVICE

PICKUP DETAILS

00:00

DROP-OFF DETAILS

00:00

REMARKS

EDIT SERVICE DETAILS

APPLY TO

☒ PICKUP DATE☒ PICKUP TIME☒ PICKUP TEXT☒ DROPOFF DATE☒ DROPOFF TIME☒ DROPOFF TEXT☒ REMARKS TEXT

5. Update the **Pick Up/Drop Off** details on the right of the screen, and select the **Applies To** check box (s) to update specific fields.

> SELECT ALLUNSELECT ALL

☒ SELECT SERVICE

PICKUP DETAILS

05-Jun-202500:00

Scenic Hotel

DROP-OFF DETAILS

05-Jun-202500:00

Scenic Hotel

REMARKS

EDIT SERVICE DETAILS

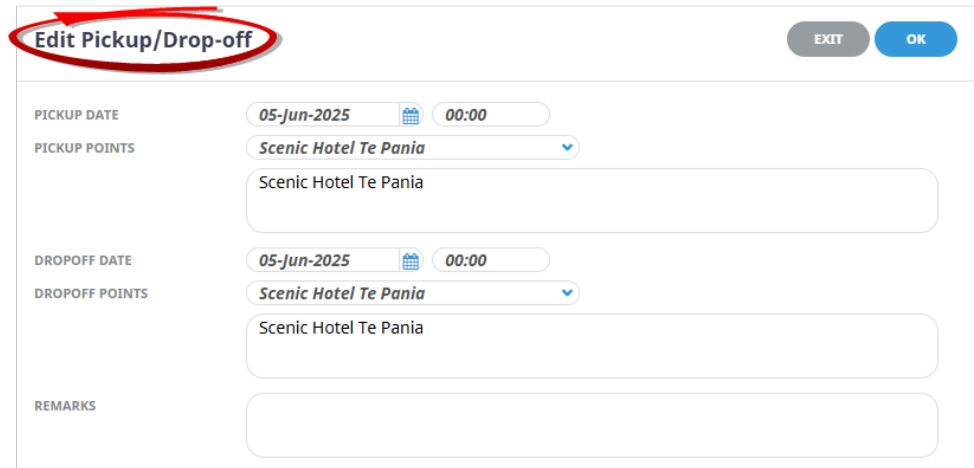
APPLY TO

☐ PICKUP DATE☐ PICKUP TIME☒ PICKUP TEXT☐ DROPOFF DATE☐ DROPOFF TIME☒ DROPOFF TEXT☐ REMARKS TEXT

6. Or click **Edit Service Details**, to enter the Pickup and drop off details.

EDIT SERVICE DETAILS

- a. Edit the required **Pick up/Drop off** fields.



Edit Pickup/Drop-off

PICKUP DATE: 05-Jun-2025 00:00

PICKUP POINTS: Scenic Hotel Te Pania

DROPOFF DATE: 05-Jun-2025 00:00

DROPOFF POINTS: Scenic Hotel Te Pania

REMARKS:

EXIT OK

- b. Click **OK** to keep the changes and save or update the entry.

7. Click **Save** to keep the changes.
8. Click **Exit** to discard any changes.
9. If **Save** was selected a Summary will appear with the number of successful PCMs to be updated.



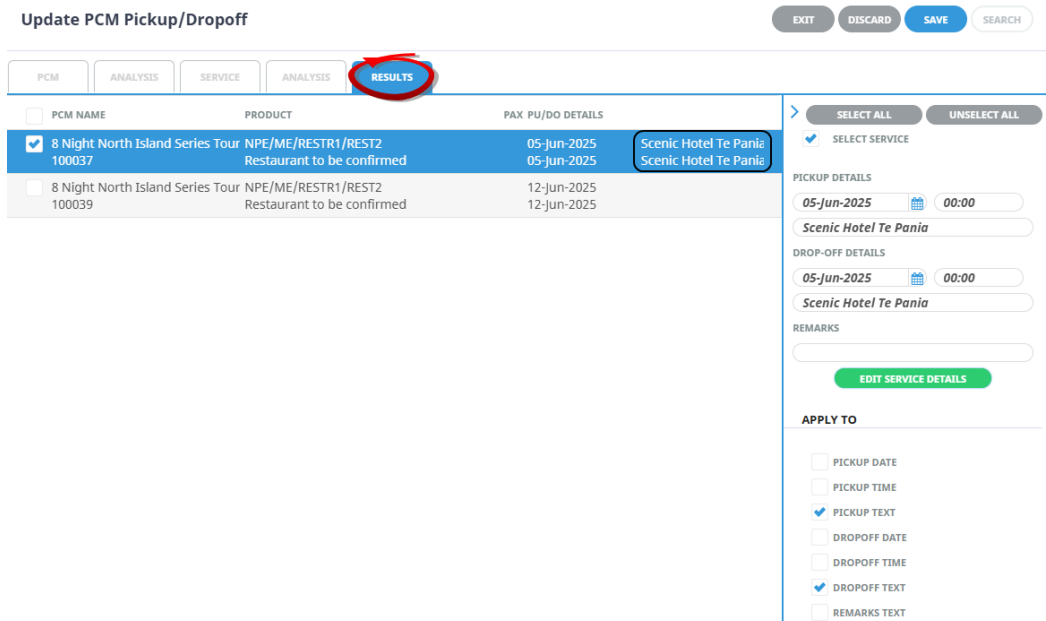
Summary

BOOKING	PRODUCT	PAX PU/DO DETAILS	MESSAGE
8 Night North Island Series Tour - Package 100037	NPE/ME/RESTR1/REST2 Restaurant to be confirmed	05-Jun-2025 05-Jun-2025 10:00	
8 Night North Island Series Tour - Package 100039	NPE/ME/RESTR1/REST2 Restaurant to be confirmed	05-Jun-2025 05-Jun-2025 10:00	

SUCCESSFUL OPERATIONS: 2 UNSUCCESSFUL OPERATIONS: 0

OK

10. Click **OK** to keep the changes and save or update the entry.
11. The **Update Pick Up and Drop Off Results** tab will re-display, the service details will have updated and can be viewed from here.



Update PCM Pickup/Dropoff

EXIT DISCARD SAVE SEARCH

PCM ANALYSIS SERVICE ANALYSIS **RESULTS**

PCM NAME	PRODUCT	PAX PU/DO DETAILS	SERVICE
☒ 8 Night North Island Series Tour - Package 100037	NPE/ME/RESTR1/REST2 Restaurant to be confirmed	05-Jun-2025 05-Jun-2025	Scenic Hotel Te Pania Scenic Hotel Te Pania
☐ 8 Night North Island Series Tour - Package 100039	NPE/ME/RESTR1/REST2 Restaurant to be confirmed	12-Jun-2025 12-Jun-2025	

SELECT ALL UNSELECT ALL

SELECT SERVICE

PICKUP DETAILS

05-Jun-2025 00:00

Scenic Hotel Te Pania

DROPOFF DETAILS

05-Jun-2025 00:00

Scenic Hotel Te Pania

REMARKS

EDIT SERVICE DETAILS

APPLY TO

☐ PICKUP DATE

☐ PICKUP TIME

☒ PICKUP TEXT

☐ DROPOFF DATE

☐ DROPOFF TIME

☒ DROPOFF TEXT

☐ REMARKS TEXT

12. Click **Save** to keep the changes.

About the Service Tab

Service Date From/To

NOTE: Mandatory field selection to trigger the Save button activation.

This is the date of the service within a PCM. Selection for a range of dates is entered and Pick Up and Drop off details for services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select Pick up and Drop off details with a specific, or range of, supplier(s) codes matching the selection.

Code From/To

Selection of a specific service code or range of service codes.

Pick up Time Range

Used to select a range of pick up times for services that fall within the time period provided.

Pick up Text

Used to select specific pick up points selected in the PCM.

Service Remarks

This selection is used to filter by specific remarks stored within the PCM service.

Master Supplier From/To

Used to select specific Master Suppliers, or range of, Master Supplier code(s) matching the selection.

Location

Select to filter by a service location.

Drop off Time Range

Used to select a range of drop off times for services that fall within the time period provided.

Drop off Text

Used to filter by specific drop off points selected within the PCM.

Service Status

By default, all PCM Service Statuses are checked. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Analysis Tab (PCM and Agent Analysis)

PCM Analysis

The top two rows of this tab are the 6 PCM Analysis codes. These are PCM header level selections.

Agent Analysis

The bottom two rows of this tab are the 6 Agent Analysis codes. These are Agent Analysis codes attached to the PCM.

Analysis fields can be expanded or minimised by using the + or - function.

PCM Tab

Base Date From/To

Base Date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCMs with a specific date, or Pick up and Drop off details for PCMs that fall within a range of Base Dates.

PCM Name

This is the name of the PCM that appears in the header of a PCM Quote or PCM Package.

PCM Ref From/To

Used to select a specific PCM reference or range of references.

Agent From/To

Used to select Pick up and Drop off Details with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Consultant

Selecting this field will filter PCMs by the consultant code attached to the PCM Quote or PCM Package.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here Pick up and Drop off details for PCMs that were created within the date range provided will be display in the results screen.

Master Agent From/To

Used to select Pick up and Drop off details with a specific, or range of, Master Agent code(s) in the PCM Quote or PCM Package header matching the selection.

Currency

Used to select PCM with a particular currency.

PCM Status

By default, all PCM statuses are checked and services in PCM Quotes or PCM Packages that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all PCM branches are checked and services in PCMs that have those branches will be selected.

Department

By default all PCM Departments are checked, services in PCMs that have those branches will be selected.



If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab (Supplier and Product Analysis)

Supplier Analysis

The top two rows of this tab are the 6 Supplier Analysis codes.

Service Analysis

The bottom two rows of this tab are the 6 Product (Service) Analysis codes. These are Product Analysis codes attached to the Service.

Analysis fields can be expanded or minimised by using the + or - function.

Bulk Service Insert

This feature allows users to insert a service into multiple PCMs using a bulk service insert process. Filters are applied to display a list of PCM results, allowing users to manage the insert of a service into selected PCMs.

Users can view standard product options and can select one product at a time to insert. The day sequence must be specified for the search, which will then be used to insert the service into each PCM based on the day number. When the "Add Service" operation is performed, it is inserted using the Day and Sequence number from the initial selection.

Bulk Service Insert

- 1. From the Home menu, select **Home > Operations > PCM Operations > Bulk Service Insert**.
- 2. On the blank **Bulk Service Insert - Manual Selection** screen, the **PCM Tab** opens. Complete the fields necessary to filter a list of PCM results. One filter selection is required from the following options; Base Date, Agent, Master Agent, Date Entered, by Consultant or Reference.

Bulk Service Insert - Manual Selection

COPY FILTERSAVE FILTERDELETEEXITINSERT

PCM

ANALYSIS

SERVICE

RESULTS

BASE DATE FROM

BASE DATE TO

AGENT FROM

AGENT TO

MASTER AGENT FROM

MASTER AGENT TO

DATE ENTERED FROM

DATE ENTERED TO

CONSULTANT

REFERENCE

- 3. Keeping with the **PCM Tab**, PCMs can be filtered by 'PCM Status', 'Branch' and or 'Department'. If applicable, select the required filters.

Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.

PCM STATUS

BRANCH

DEPARTMENT

ALL

CANCELLED

MASTER

PACKAGE

QUOTE

ALL

AUSTRALIAN OFFICE

NZ OFFICE

USA OFFICE

ALL

COASTAL EXCURSIONS

FIT

GROUPS

INCENTIVES

INTERNET FIT

SERIES TOURS

SHORE EXCURSIONS

SPECIAL GROUPS

- 4. Click on the **Analysis Tab**, selection of current PCMs can also be made from 6 of the PCM Analysis Codes. If required select the applicable 'Analysis Codes'.

Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.

PCM

ANALYSIS

SERVICE

RESULTS

PCM TYPE

MARKUP TYPE

ALL

CONFERENCE

FAM TRIP

INCENTIVE

PACKAGE

SERIES

SPECIAL INTEREST

TAILOR MADE/BESPOKE

ALL

MANUAL

STANDARD

UNASSIGNED

- Click on the **Service Tab**, select a *Service Date From/To*, *Supplier*, *Master Supplier*, or *Location* to filter PCMs with specific Services.

The screenshot shows the 'SERVICE' tab selected in a navigation bar. Below the bar, there are several filter fields: 'SERVICE DATE FROM' and 'SERVICE DATE TO' with calendar icons; 'LOCATION' with a dropdown arrow; 'SUPPLIER FROM' and 'SUPPLIER TO' with dropdown arrows and search icons; and 'MASTER SUPPLIER FROM' and 'MASTER SUPPLIER TO' with dropdown arrows.

- Keeping with the **Service Tab**, PCMs can be filtered using *Service Status*, *Service Type*.

The screenshot shows the 'Service Tab' with a text box explaining that filters are examples for training. Below this, there are two columns of filters: 'SERVICE STATUS' and 'SERVICE'. Both columns have a list of items with checkboxes, all of which are checked. The 'SERVICE' list includes items like ACCOMMODATION, ACTIVITY, CANCELLATION FEE, CRUISE, ENTRANCE FEE, FLIGHT, GUIDE, ITINERARY TEXT, MEAL, PACKAGE, RENTAL VEHICLE, SIGHTSEEING/DAY TOUR, and SUNDRY.

- Check the **completed screens**.
- Click on the **Results Tab**. Select the PCMs using the 'Selected check boxes' next to each PCM, or use 'Select All'.

NOTE: The Insert Button will become active when PCMs are selected.

The screenshot shows the 'RESULTS' tab selected. At the top, there are buttons for 'SELECT ALL' and 'UNSELECT ALL'. Below these is a table with columns: 'PCM NAME', 'PCM REFERENCE', 'BASE DATE', and 'CONSULTANT'. The table contains two rows of data. The first row is highlighted in blue and has its selection checkbox checked. The second row has its selection checkbox unchecked.

PCM NAME	PCM REFERENCE	BASE DATE	CONSULTANT
8 Night North Island Series Tour - Master	100036	01-Jun-2026	PNJ
8 Night North Island Series Tour - Package	100038	01-Jun-2026	PNJ

- Click **Insert** to add a new entry.

INSERT

- On the blank **Service Line Insert** screen, select a 'Location' or 'Supplier' and a 'Service Type' to search for Product.

NOTE: To insert the service mid itinerary adjust the Day/Seq fields to show the correct values, the Service Date will update if Day/Seq fields are edited. If the Service Date is edited the Day/Seq will automatically update.

Service Line Insert

EXIT

SELECTIONRESULTS

ALL SERVICES

ACCOMMODATION

ACTIVITY

CANCELLATION FEE

CRUISE

ENTRANCE FEE

FLIGHT

GUIDE

ITINERARY TEXT

MEAL

PACKAGE

RENTAL VEHICLE

SIGHTSEEING/DAY TOUR

SUNDRY

SURCHARGE FEE

TRANSFER

TRANSPORT

DAY/SEQ.1 / 40

SERVICE DATE02-Jun-2025Monday

SCU1

COUNTRY

DESTINATION

LOCATION

SUPPLIER

CODE

FIND PRODUCTS

+ PRICE CODE

11. Click **Find Products**.

FIND PRODUCTS

12. On the **Results** tab, select the service to insert into the PCM.

SELECTIONRESULTS

Q

INSERT

LOCATION NAME

SERVICE NAME

SUPPLIER NAME

DESCRIPTION

COMMENT

CLASS

RETAIL

INSERT

Wellington

Entrance Fee

Concert Event

Concert Event - To Be Co...

250.00

13. Click **Insert** to add a new entry.

INSERT

14. The **Service Line Insert** screen opens with the Product Selected, check the PCM Details: *Day Sequence & Service Status* fields.

NOTE: If pickup and drop off details are known they can be edited here.

Service Line Insert

EXIT

SAVE

PRODUCT SELECTED

WLG / EF / EVENTC / CAKETN

Product Selected (Wellington, Entrance Fee):
Concert Event, Concert Event - To Be Confirmed.

SERVICE INFORMATION

PCM DETAILS

DAY/SEQ.6 / 15

IN DATE07-Jun-2025Saturday00:00

EVENT1

SERVICE STATUSPS - Package Service

MAIN SERVICE PRICE: 250.00 NZD

APPLY DATABASE MARKUP

DEFAULT DRIVER

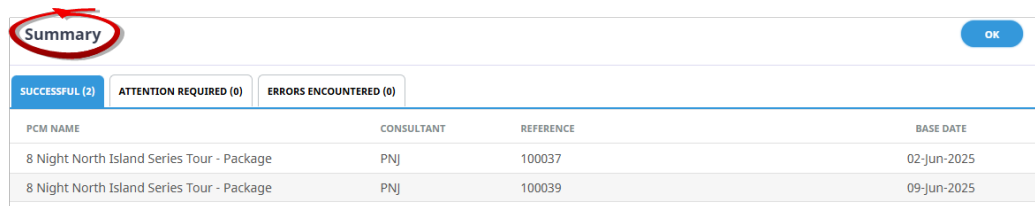
DEFAULT GUIDE

VOUCHER

PICKUP

15. Click **Save** to keep the changes.

16. Click **Exit** to discard any changes.
17. If **Save** was selected a Summary will appear with the number of successful PCMs updated.



PCM NAME	CONSULTANT	REFERENCE	BASE DATE
8 Night North Island Series Tour - Package	PNJ	100037	02-Jun-2025
8 Night North Island Series Tour - Package	PNJ	100039	09-Jun-2025

18. Click **OK** to exit the modal.
19. The Bulk Service Insert Results Tab will re-display select **Exit** to close.

About Bulk Service Insert Fields

There are some additional considerations with using a bulk service insert feature.

- » Package, non-accommodation package products cannot be inserted into multiple PCMs.
- » External Services are unable to display in the Insert Service Results screen and therefore cannot be inserted.
- » If a product rate has a Split Service, Rate Category for cross seasonal quotes - the bulk service insert process will insert a single service for the entire stay length.
- » Adding a service to a PCM already inserted into a booking, operates the same as adding a service manually to a PCM.

PCM Tab

This is the default tab that will open when selecting to insert a service within multiple PCMs in a bulk update process.

Base Date From/To

Base Date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCM with a specific date, or PCMs that fall within a range of base dates.

Agent From/To

Used to select PCMs with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Master Agent From/To

This selection is used to filter PCMs with a specific, or range of, Master Agent(s) codes in the PCM details screen matching the selection.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here, PCMs that were created within the date range provided will be display in the results screen.

Consultant

Selecting this field will filter PCMs by the consultant code attached to the PCM Quote or PCM Package.

Reference

Used to select a specific PCM reference.

PCM Status

By default, all PCM statuses are checked and PCM Quotes or PCM Packages that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch

By default, all PCM branches are checked and PCM Quotes or PCM Packages that have those branches attached will be selected.

Department

By default all PCM Departments are checked, PCM Quotes or PCM Packages that have those branches attached will be selected.



If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab

PCM Analysis

The top two rows of this tab are the 6 PCM Analysis codes. These are PCM header level Analysis selections.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Service Tab

Service Date From/To

This is the date of the service within a PCM. If selection for a range of dates is entered here, PCMs with services that fall within the date range provided will display in the results screen.

Supplier From/To

Used to select PCMs with a specific, or range of, supplier(s) codes matching the selection.

Master Supplier From/To

This selection is used to find PCMs with a specific, or range of, Master Supplier(s) codes matching the selection.

Location

Find PCMs with services in the itinerary for the selected location.

Service Status

By default, all service statuses are checked and services that have those status will be selected. Un-check statuses that are not required.

Service Type

By default, all Service (Types) are checked. Un-check service types that are not required.

Results Tab

Selected check boxes

PCMs can be individually selected.

Selected/Found Fields

These fields are non editable fields, which provide a tally of the results found, and the PCMs selected.

Select All/Unselect All

Select all PCMs found, or un-select all PCMs selected.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Bulk Service Insert (PCM), see ["Booking Operations" on page 226](#).

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Service Line Insert

Insert Service Line Results

The Results tab shows a list of all products found that match the selection criteria. Products are presented in list form under the following columns.

NOTE: All scrollable lists can have columns added or removed per user (i.e. you can change the default columns that appear in your view of the list). Click on a space in between two column labels (if you click on the label itself, the scroll will re-sort based on the column clicked on). The list of available column names will display and they can be check-box selected/deselected. The width can also be set, as can normal or bold font.

Filter Button

The results tab provides users with an additional filter option, products and services can be filtered by class, locality or attached amenities.

NOTE: *This is dependant on if user company's procedures have selected to use these fields in their product setup.*

Consultants can also define a rate price range for results to return based on minimum and maximum agent values.

Search Icon

There is a search icon located next to the column 'Book' heading. This allows users to quickly search the Product Search application for an existing entry. An additional search field will enable users to insert text to search, and previous and next (arrow buttons) identify entries which match the search criteria.



The Enter key can be used as a quick key to move to the next matched searched result.

Insert

A button labelled Insert allows the service to be inserted into the selected bookings or PCMs.

Location Name

Full name of the location where the service is provided.

Service Name

Full name of the service (from the Selection tab under *All Services*).

Name

Full name of the service supplier.

Description

A drill-down link to further information about the service, including *Rates* and *Notes*. Book and Hold buttons are also available on the drill-down screen (albeit coloured blue, rather than green and grey).

This example shows a property that has FYI message information, and shows the amenities available at the property. Clicking on the other tabs within this screen will allow users to see further detail.

MESSAGE	VALID FROM	EXPIRES	PUBLIC
RWC rates may apply - see RWC terms & condi...	02-Sep-2025	31-Oct-2025	✓

AMENITIES

- Hotel Facilities**
 - ✓ 24 Hour Room Service
 - ✓ Business Centre
 - ✓ Car Park - Charges
 - ✓ Laundry Facilities
 - ✓ Restaurants & Bars on Site
- Recreation & Fitness**
 - ✓ Sauna
- Room Facilities**
 - ✓ Air Conditioning
 - ✓ Internet Access

Comment

A further field that is sometimes used as an extra descriptive field for product, or for an internal note. An example could be for accommodation services, where this organisation uses the comment field to show meal inclusions - Includes light continental breakfast.

Class

For accommodation services, this label identifies the class of accommodation; e.g. 4-Star, 5-Star, Backpackers, Luxury Boutique etc.

Sell

The cost price in the Product Database, plus markups (regardless of source), less agent commission.

NOTE: It is possible that the same product displays multiple times. This is because of INI settings that determine what is to display by default. Where the same product is displayed multiple times, it is once for each price code that has been set up against the date range for the product.



"Booked" is not Saved

It is important to remember that, when viewing a list of results (or any aspect of a service within these tabs), the service has *not yet been inserted into the* , *even if "Book" has been clicked*. The tabs are available to refine selections and to inquire on various aspects of a service. Services are not saved into the until the Insert New Service process is complete, which requires each service

A full list of field columns available within the Results tab is available [Service Line Insert \(Service Scroll Headings\)](#).

Summary

A summary of the PCM Bulk Service Insert process is displayed to inform users of successful service insertion. Additional tabs highlight PCMs that require further attention to add a new service or indicate if an error has occurred.

Summary Modal displays three tabs:

- » **Successful** - where the total number of processed PCMs is displayed in the bottom left corner of the Modal. The number of PCM successfully updated displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, and Base Date.
- » **Attention Required** - where the number of PCMs requiring attention displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, Base Date, Rate Status, and a Message column indicating the attention which is required. For example: Rates have expired, a cross season rate, a sequence number changed.
- » **Errors Encountered** - where the number of PCMs which encountered errors displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, Base Date, Rate Status, and a Message column indicating the error.

Save Bulk Service Insert Filters

Common or frequently used Bulk Service Insert Filters can be saved and given a Description so that repeatable tasks are easily accomplished.

Bulk Service Insert

1. From the Home menu, select **Home > Operations > PCM Operations > Bulk Service Insert**.
2. Click **Manual**.



3. On the blank Bulk Service Insert - Manual Selection screen, the **PCM Tab** will open, select the required filters from the field selections, and tabs available.

View ["About Bulk Service Insert Fields" on page 199](#) to learn more about all field selections available, or view the individual tab filters; ["PCM Tab" on page 199](#), ["Analysis Tab" on page 200](#) (PCM), ["Service Tab" on page 200](#), or ["Results Tab" on page 200](#).

4. Check the **completed screens**.
5. Click on the **Results Tab**.
6. If you want to save this filter, click **Save Filter**.



7. On the empty **New Selection** screen, give the Saved Filter Selections a 'Description'.

8. Click **Add** to add this filter description.



9. Click **Exit** to discard any changes.
10. **NOTE:** If **Add** is selected the New Selection Description will appear in the Header of the Results Tab and the Description will display each time users open Bulk Service Insert. If selected for future Bulk Service Insert processing, results will be returned based on the saved filters.

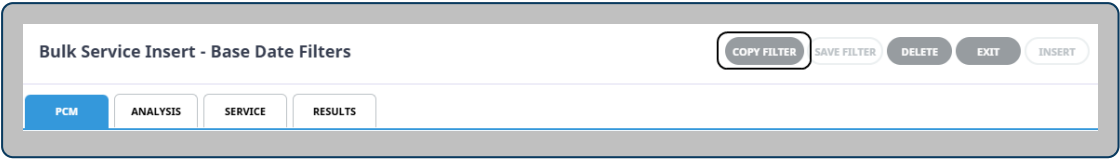


The procedures just described are sufficient to create manual filter criteria to manage Bulk Service Insert features - saving filters for future use. There are many filter combinations that user companies can make unique to their organisation. Each requires selection from drop-down field or check boxes. The creation of these drop-down or check box entries is outside the scope of this procedure, however, you might see screenshot examples where such selections have been used.

NOTE: The selection options for these fields would have been pre-determined at the time of your System Setup and will fit the purpose of your organisation. For more information on creating drop-down selections for Analysis Fields or Check boxes, see the [System Setup User Manual](#).

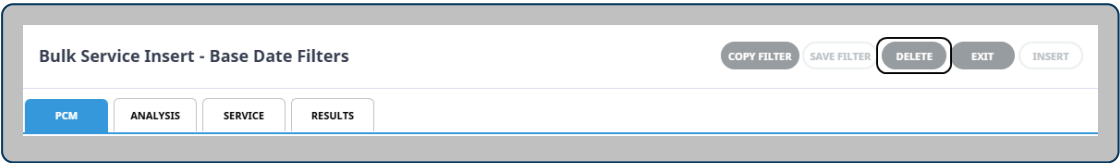
Copy Bulk Service Insert Filters

There maybe times where you have complex filters selected and you want to make a subtle amendment. In this case Manual Filters or Saved Filters can be copied and given a new description from within the PCM Tab. Users can copy existing filters by using **Copy Filter**, make the necessary changes to filter selections and re-save giving the newly copied filters a new description.



Deletion of Bulk Service Insert Filters

Deletion of Filter Descriptions is allowed, to be able to manage currency of tasks and a confirmation message will display to ensure that you want to delete the Filter Description. If you select to **Delete**, the filters will not be able to be retrieved again.



PCM Status Update

There may be situations that you will need to do a bulk update of PCM Status.

Multiple PCMs are selected, and updated in bulk. The procedure below describes how to update multiple PCM Statuses.

Bulk Update PCM Status

1. From the Home menu, select **Home > Operations > PCM Operations > PCM Status Update**.
2. On the blank **PCM Status Update** screen, the **PCM Tab** will open, Complete the necessary fields in 'PCM Filters' section. You can amend the Base Date From/To, and Date Entered From/To fields to display results for a range of dates.

3. Keeping with the **PCM Tab**, PCMs can be filtered using 'PCM Status', 'Service Status', 'Branch' and or 'Department'. If applicable, select the required filters.

Filters used in this screen capture are examples used for Training purposes. Statuses, Branch and Department selection will reflect users own organisational fields.

PCM STATUS	BRANCH	DEPARTMENT
☒ ALL	☒ ALL	☒ ALL
☒ CANCELLED	☒ AUSTRALIAN OFFICE	☒ COASTAL EXCURSIONS
☒ MASTER	☒ NZ OFFICE	☒ FIT
☒ PACKAGE	☒ USA OFFICE	☒ GROUPS
☒ QUOTE		☒ INCENTIVES
		☒ INTERNET FIT
		☒ SERIES TOURS
		☒ SHORE EXCURSIONS
		☒ SPECIAL GROUPS

4. Click on the **Analysis Tab**, selection of PCMs can also be made from 6 of the PCM Analysis Codes. If required select the applicable 'Analysis Codes'.

Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.

5. Check the **completed screens**.

- Click on the **Results Tab**. Select the PCMs using the 'Select check boxes' next to each PCM, or use 'Select All'.

NOTE: The Update Status button will become active when PCMs are selected.

PCM Status Update EXIT UPDATE STATUS SEARCH

PCM ANALYSIS **RESULTS**

SELECTED 0 FOUND 10 SELECT ALL UNSELECT ALL

☐	PCM NAME	PCM REFERENCE	BASE DATE	AGENT	CONSULTANT	STATUS	LAST WORKED DATE
☐	12 Day Best of New Zealand	100027	04-Apr-2025	PKGBKG	GRB	Package	01-Nov-2023
☐	4 Day Sails & Sulphur	100024	04-Apr-2025	PKGBKG	GRB	Package	19-May-2023

- To change the status, click **Update Status**.
- On the blank **PCM Status Update** screen, select the new Status to set the PCM Status to.

PCM Status Update EXIT YES

SET PCM STATUS TO

- To keep the changes, click **Yes**.

YES

- Click **Exit** to discard any changes.

- If **Yes** was selected a Summary will appear with the number of successful PCMs to be updated.

Summary OK

SUCCESSFUL (2) **ERRORS ENCOUNTERED (0)**

PCM NAME	PCM REFERENCE	STATUS	CONSULTANT	BASE DATE
12 Day Best of New Zealand	100027	Master	GRB	04-Apr-2025
4 Day Sails & Sulphur	100024	Master	GRB	04-Apr-2025

- Click **OK** to exit the modal.
- The PCM Status Update Results Tab will re-display select **Exit** to close.

About PCM Status Update Fields

Name Starts With

This field will be empty, if the PCM name is known, you can enter it here.

Name Contains

As with Name Starts With, this field will be empty, This is a string search facility, i.e. it will find PCMs matching any combination of consecutive characters entered in the field, regardless of where in the PCM name the string occurs.

Agent

Selecting an agent will limit the filter results to only PCMs for that agent.

Consultant

Selecting a consultant code and consultant name will limit the results to PCMs for that consultant.

PCM Ref

Used to select a specific PCM Reference.

Base Date From/To

Base Date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCMs with a specific date or fall within a range of Base Dates.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here Pick up and Drop off details for PCMs that were created within the date range provided will display in the results screen.

PCM Status

By default, all PCM statuses are checked, PCMs can be filtered by selecting / deselecting the required PCM status code in the Multi Select List box. Un-check statuses that are not required.

Branch

By default, all PCM Branches are checked, if only PCMs with specific Branch(s) need to have the PCM Status Updated, check the appropriate box(es).

Department

By default, all PCM Departments are checked, if only PCM's with specific Department(s) need to have the PCM Status Updated, check the appropriate box(es).



If Branch and Department fields are used for PCMs, they will be available for selection.

Analysis Tab (PCM Analysis)

PCM Analysis

The rows on this tab are the 6 PCM Analysis codes.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected check boxes

PCMs can be individually selected.

Select All/Unselect All

Select all PCM's found, or un-select all PCM's selected.

Selected

The cell to the right of this heading will provide you with the number of PCMs that have been selected.

Found

The system will provide you with the number of PCMs found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

Summary

A summary of the PCMs processed is displayed to inform users of successful Status Updates. Additional tabs highlight PCMs that require further attention to update their status or indicate if an error has occurred.

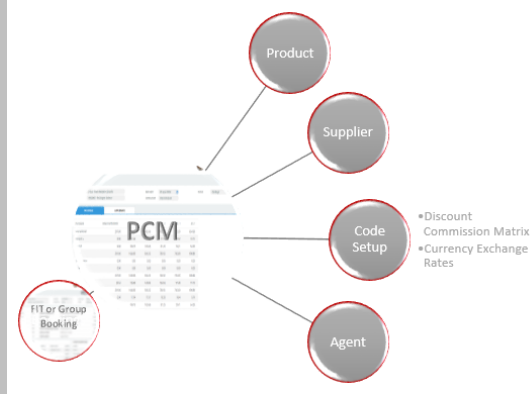
Summary Modal displays three tabs:

- » **Successful** - where the total number of processed PCMs is displayed in the bottom left corner of the Modal. The number of PCM successfully updated displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, and Base Date.
- » **Errors Encountered** - where the number of PCMs which encountered errors displays next to the tab heading, and a list of PCMs is shown, including the PCM Name, Consultant, Reference, Base Date, Rate Status, and a Message column indicating the error.

Recalculate All PCM Quotes

Recalculation of PCM Quotes or PCM Packages can occur in bulk instead of quotation by quotation, package by package, selection of different fields will determine the quotations/and or packages to be recalculated.

If changes are made to any of the applications noted below, the PCMs selected would be recalculated to reflect the change.



Once a recalculation has occurred to a PCM, users can choose to recalculate their bookings where the PCM has been used. Although this would need to be done in the [Recalculate All Bookings](#) function or within the individual FIT or Group Booking.

Recalculate All PCM Quotes

1. From the Home menu, select **Home > Operations > PCM Operations > Recalculate PCM Quotes**.
2. On the blank **Recalculate All PCM Quotes** screen, the **PCM Tab** will open, select the required filters from the field selections available within the **PCM Tab**, and the **Analysis Tab**. Click on the links to find out more about the fields [PCM Tab](#), [Analysis Tab](#).

NOTE: *Base Date From/To*, and *Date Entered From/To* fields are defaulted to system settings, these fields can be amended to suit recalculation requirements.

Filters used in this screen capture are examples used for Training purposes. PCM Statuses will reflect users own organisational fields.

Recalculate All Pcm Quotes
EXIT
RECALCULATE
SEARCH

PCM
ANALYSIS
RESULTS

PCM FILTERS

NAME STARTS WITH
NAME CONTAINS
AGENT
CONSULTANT
PCM REF

BASE DATE FROM
BASE DATE TO
DATE ENTERED FROM
DATE ENTERED TO

PCM STATUS

BRANCH

DEPARTMENT

Analysis Codes used in this screen capture are examples used for Training. Analysis field headings and codes will reflect users own organisational fields.

The screenshot shows the 'Recalculate All Pcm Quotes' interface. At the top, there are buttons for 'EXIT', 'RECALCULATE', and 'SEARCH'. Below the title bar, there are three tabs: 'PCM', 'ANALYSIS' (which is selected and circled in red), and 'RESULTS'. The main content area is divided into two columns: 'PCM TYPE' and 'MARKUP TYPE'. Both columns contain a list of items with checkboxes, all of which are checked. The 'PCM TYPE' list includes ALL, CONFERENCE, FAM TRIP, INCENTIVE, PACKAGE, SERIES, SPECIAL INTEREST, and TAILOR MADE/BESPOKE. The 'MARKUP TYPE' list includes ALL, MANUAL, STANDARD, and UNASSIGNED.

3. Check the **completed screens**.
4. Click on the **Results Tab**. Select the PCM Quotes or Packages using *Select* check-boxes next to each service, or use *Select All*. Click on the link to find out more about the fields [Results](#) fields.

The screenshot shows the 'Recalculate All PCM Quotes' interface with the 'RESULTS' tab selected (circled in red). At the top, there are buttons for 'EXIT', 'RECALCULATE', and 'SEARCH'. Below the title bar, there are three tabs: 'PCM', 'ANALYSIS', and 'RESULTS' (selected). Below the tabs, there are two summary boxes: 'SELECTED' with a value of '0' and 'FOUND' with a value of '18'. To the right of these are buttons for 'SELECT ALL' and 'UNSELECT ALL'. Below this is a table with the following columns: PCM NAME, PCM REFERENCE, CONSULTANT, TRAVEL DATE, AGENT, and LAST WORKED DATE. The table contains three rows of data, each with a checkbox in the first column.

	PCM NAME	PCM REFERENCE	CONSULTANT	TRAVEL DATE	AGENT	LAST WORKED DATE
☐	Best of New Zealand - 10 Day Coach 2	100022	GRB	01-Mar-2022	SUNBKG	15-Aug-2023
☐	2-Day Town Wander (Coach)	100019	SD	01-Nov-2023	PKGBKG	08-Jun-2023
☐	4-Day Extended Wander	100020	SD	01-Nov-2023	PKGBKG	02-May-2023

5. If you want to recalculate, click **Recalculate**.

RECALCULATE

6. On the **Recalculate PCMs Settings** screen, check the required setting, and select if you want the system to update the exchange rates. Click on the link to find out more about the [Recalculate](#) settings.

NOTE: The system will default to *Replace All But Overrides*.

The screenshot shows the 'Recalculate Pcms Settings' screen. At the top, there is a title bar with the text 'Recalculate Pcms Settings' (circled in red) and buttons for 'EXIT' and 'YES'. Below the title bar, there are four radio button options: 'REPLACE ALL', 'REPLACE ALL BUT OVERRIDES' (which is selected), 'NO PRICES', and 'UPDATE EXCHANGE RATES'.

7. To keep the changes, click **Yes**.

YES

8. Click **Exit** to discard any changes.

9. If **Yes** was selected a **Recalculate Summary** will appear with the number of successful PCMs processed.



10. Click **OK** to exit the modal.

About Recalculate PCM Quotes Fields

PCM Tab

This screen is in two sections. The top section includes 'PCM' filter selection. The bottom section includes selection for PCM Status, Branch or Department.

Name Starts With

This field will be empty. If the PCM name is known, enter the name here.

Name Contains

As with Name Starts With, this field will be empty. This is a string search facility, i.e. it will find PCMs matching any combination of consecutive characters entered in the field, regardless of where in the PCM name the string occurs.

Agent

Used to select PCMs with a specific, or range of, agent(s) codes in the PCM header matching the selection.

Consultant

Selecting a consultant code and consultant name, will filter PCMs by the consultant code attached to the PCM Quote or PCM Package.

PCM Ref

Used to select a specific PCM reference.

Base Date From/To

Base date for PCMs is the date that appears in the header of a PCM Quote or PCM Package this is generally the date of the first service. This date range field is used to select PCMs with a specific base date, or PCMs that fall within a range of base dates.

Date Entered From/To

This is the date the PCM Quote or PCM Package was created. If selection for a range of dates is entered here, PCMs that were created within the date range provided will display in the results screen.

PCM Status

By default, all PCM statuses are checked and PCM Quotes or PCM Packages that have those statuses will display in the results screen. Un-check statuses that are not required.

Branch/Department

If Branch and Department fields are used for PCMs, a list of available checkboxes will be visible to filter PCM Quotes by Branch and/or Department.

Analysis Tab (PCM Analysis)

PCM Analysis

The rows on this tab are the 6 PCM Analysis codes.

NOTE: The label descriptions and analysis selections used within this User Manual will vary and will display what has been setup in each user company's system.

Results Tab

Selected check boxes

PCMs can be individually selected.

Select All/Unselect All

Select all PCM's found, or un-select all PCM's selected.

Selected

The cell to the right of this heading will provide you with the number of PCMs that have been selected.

Found

The system will provide you with the number of PCMs found, matching the filter criteria.

Column Headings

Users can customise their column headings by clicking on the header row, or can amend the order of results by clicking on the field heading, see ["About Changing Default Column Headings" on page 226](#).

To view the available column headings in Recalculate All PCM Quotes, see ["Booking Operations" on page 226](#).

NOTE: The data can be sorted by any column by double clicking the column header. The order can then be reversed by double clicking the column header again.

About Recalculate PCM Settings

Replace All

Revisits the Tourplan Product Rates and re-costs all services within the PCM.

All Except Overrides

Revisits the Tourplan Product Rates however does not re-cost services where the original product rates were manually overridden. Manually overridden values need to be confirmed with 'OK'.

No Prices

Recalculates the totals based on the existing service line values within the PCM.

Update Exchange Rates

When the PCM services are re-costed should Tourplan continue to use the previous exchange rates (unchecked) or use the exchange rates from the Tourplan Code Setup Module.

CHAPTER 6

Pax CRM

Traditionally a CRM space is used to store additional details for your passengers travelling, information such as loyalty programs, passport details even credit card details can be entered at the time of booking and will be stored in the Pax CRM.

The Pax CRM application also allows storage for details of clients who may not have made a booking, instead they may have requested brochures or made an enquiry allowing you to store their contact information too.

This application allows organisations to quickly access client personal and profile details for those passengers who have previously travelled, and keep records current in a central database instead of storing the information within individual bookings.

In this chapter ...

Insert New Pax	214
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Group Search	222

Insert New Pax

Inserting a new passenger record from within the CRM application allows you to store data on clients who may not be travelling. You may have had a phone enquiry or have taken client details from a trade show.

You can record their details here until such time that they make a booking.

Insert New Client into the CRM

1. Select **Menu Home > Operations > Pax CRM**.

2. Click **Insert Pax**.



3. On the **Create Pax** screen enter the pax details and if the passenger belongs to a group of travellers enter known details.

4. Click **Save** to keep the changes.

5. The **Details Tab** will open where the pax full name, alias and date of birth can be noted on the upper section of the screen. The middle section allows storage of passport details and contact information specific to this passenger, with the lower section of the screen allowing any information defined by your organisation to be entered for the passenger.

6. Adding contact details for this passenger is done in the **Contacts Tab**. Select **Insert**, and complete the Insert Pax Travelling Contact Form with the details you have on hand.

- a. Click **Save** to keep the changes.
 - b. Click **Exit** to discard any changes.
7. Unique passenger profile entries are available from the **Profile Tab**. This is where organisations may choose to store visa information, loyalty membership numbers or special requirements. To insert a profile entry, highlight the profile heading on the left and select **Insert**.

8. Select the **Profile Type**, and the **Category**.

9. If you want to keep the changes, click **OK**.

10. To keep the changes, click **Save**.

11. Click **Discard** to discard all changes.

12. Click **Exit** to discard any changes.

About the Details Tab

Pax Name

The Pax name fields should follow your naming conventions when inserting booking names. These fields will eventually be used within bookings and using the correct naming convention now will save you time in the long run.

Pax Type

This drop-down section is used to assign a type to the individual pax names being entered. Pax types available:

- » Adult (Default)
- » Child

- » Infant

Title Alias, First Name Alias, Surname Alias

The alias fields allow passenger name variations typically used to save alternative language text for a passenger's name. They also provide for alternative language searching for passenger details so should follow your standard naming conventions for aliases.

Date of Birth

- » If the product database has had Age Policies completed, then the date of birth of children and infants can be entered into the 'Date of Birth' field. Tourplan will calculate the age(s) of children/infants based on the date of birth vs the date of service in the booking and apply Adult or Child costing automatically, depending on the age of the child/infant at the time.
- » If adult dates of birth are being entered, check that the DOB is not a date prior to the years from/to as defined in Windows Control Panel Regional Settings. By default, Windows interprets 2 digit years as being between 1930 and 2039. If a DOB is entered which is prior to 1939, it is calculated as 100 years later; e.g. 1937 is calculated as 2037.

Passport Details

These six fields allow passport information to be stored against each passenger (including children). The information inserted here can display on messages and documentation if the message templates use the correct substitution codes.

Passport Details include:

- » Passport Name - Full name of passenger as seen in their passport.
- » Passport Number - Passengers passport number.
- » Nationality - Nationality of Passenger as seen in their passport.
- » Place of Issue - Place of passport issue.
- » Issued/Expires On - Issue and Expiry date of passport (Calendar selection or format dd/mm/yy the system will amend the manually entered date to dd-mmm-yyyy).

User Defined Text

These ten fields are unique to your organisation requirements and must first be setup in [System Setup User Manual](#).

About the Pax Travelling Contact Fields

Contact Type

The type of contact.

Examples are: BU-Business HM-Home. These must first be set up in [System Setup User Manual](#).

NOTE: Contact Types can be used multiple times in this screen - e.g., there can be more than one contact with a Contact Type of 'BU' (Business), provided the Contact Name is different for each contact.

Contact Name

The name of the contact.

Phone Number

The phone number for this contact.

Mobile Phone Number

The mobile phone number for this contact.

Fax Number

The fax number for this contact.

Email Address

The email address for this contact.

Web Address

The web address for the contact.

Recording Profile Information

Profile information could include Special Diets, Passport Information, noting Membership numbers such as Frequent Flyer membership, and or specific Analysis Data.

About the Pax Profile Fields

Profile Type

The Profile Types available on screen are unique to your organisation and have been configured in [System Setup User Manual](#).

Profile Category

As with Profile Types, the Profile Categories have been pre-set in system setup. These drop-down fields are unique to your organisations requirements. See [System Setup User Manual](#).

Expiry

Some fields such as loyalty programs or visa details will need to store expiry date information. If there is no expiry for your Profile Entry Type this date field can be left empty.

Search For Existing Pax

The Pax CRM stores each customer name with their unique ID number. Individual passengers can be linked to group names. Pax search - enables results for existing passenger records using various filter criteria. Once located, passenger details can be edited or deleted.

This procedure identifies the steps required to find an existing passenger.

There are two options when searching for existing passengers.

1. The first is if you know surname of the passenger, and list of passengers matching the searched name will return. The forename field will enable if the surname field is not empty.
2. The second is a more advance search offering a filtered selection based on contact details or a range of pax name options.

Find existing passenger in the CRM

1. Select **Menu Home > Operations > Pax CRM**.
2. Search for the Passenger either by.
 - a. Entering the Surname or First Name of the passenger and select **search**.



- b. Or if the passenger name is unknown select **search** to enter more advance filters for searching.



Pax Search interface showing filters:

PAX NAME FILTERS
 SURNAME STARTS WITH
 SURNAME CONTAINS
 FIRST NAME STARTS WITH
 FIRST NAME CONTAINS

OTHER FILTERS
 AGENT
 CUSTOMER NO.
 PASSPORT NAME CONTAINS
 PASSPORT NUMBER

CONTACT DETAILS FILTERS
 TYPE
 EMAIL CONTAINS
 WEB CONTAINS
 PHONE CONTAINS
 MOBILE CONTAINS
 FAX CONTAINS

GROUP FILTERS
 GROUP NAME STARTS WITH
 ADDRESS CONTAINS
 POST CODE

- c. Click **Search**.

3. A full list of passenger names matching your search will return, click on the **name of the passenger** to view their entered details.

Pax Search

CUSTOMER NO.	SURNAME	FIRST NAME	PAX TYPE	DATE OF BIRTH
7670	Lindsay	Adrienne	Child	25-Apr-2012
7668	Lindsay	Alfred	Adult	
7669	Lindsay	Anne	Adult	

4. View passenger records from the **Details Tab** where the pax full name, alias and date of birth can be noted on the upper section of the screen. The middle section allows storage of passport details and contact information specific to this passenger, with the lower section of the screen allowing any information defined by your organisation, e.g. Special Requirements, to be entered for the passenger.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS PROFILE GROUPS BOOKINGS

PAX NAME

TITLE	Mr	TITLE ALIAS	
FIRST NAME	Alfred	FIRST NAME ALIAS	
SURNAME	Lindsay	SURNAME ALIAS	
PAX TYPE	Adult	DATE OF BIRTH	

PASSPORT DETAILS

PASSPORT NAME		PLACE OF ISSUE	
PASSPORT NUMBER		ISSUED ON	
NATIONALITY		EXPIRES ON	

USER DEFINED TEXT

SPECIAL REQUIREMENTS

- Adding contact details for this passenger is done in the **Contacts Tab**. Select **Insert**, and complete the Insert Pax Travelling Contact Form with the details you have on hand.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS **CONTACTS** PROFILE GROUPS BOOKINGS

INSERT

TYPE	CONTACT NAME	PHONE NUMBER	MOBILE PHONE	FAX NUMBER	EMAIL ADDRESS	WEB ADDRESS

- Click **Save** to keep the changes.
- Click **Exit** to discard any changes.

- Unique passenger profile entries are available from the **Profile Tab**. This is where organisations may choose to store visa information, loyalty membership numbers or special requirements. The setup of these headings is detailed in the System Setup User Manual.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS **PROFILE** GROUPS BOOKINGS

CATEGORY	VALUE	EXPIRY
Profile		
Passport Details		
Membership		
Loyalty Program	Air NZ/Star A # 12345	28-Oct-2026
Loyalty Program	Hilton Honors # 555	03-Jul-2030
Analysis Data		

INSERT DELETE

You can see in this example that Mr Alfred Lindsay is a member of two loyalty programs (Air NZ and Hilton Honors and his loyalty numbers and expiry dates have been recorded for both).

- The **Groups Tab** provides the ability to view if the passenger is linked in a group of travellers.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS PROFILE **GROUPS** BOOKINGS

GROUP NAME	ADDRESS 1	TYPE
USTA Trainers Group 2024	USTA - 6487 Main Highway	DG

- A list of bookings the passenger has previously been named in can be viewed or selected from the **Booking Tab**.

INSERT PAX EXIT

PAX NAME Lindsay/Mr/Alfred

GROUP NAME

Pax Details: Lindsay/Mr/Alfred

ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS PROFILE GROUPS **BOOKINGS**

BOOKING NAME	BOOKING TYPE	REFERENCE	TRAVEL DATE	ENTERED	AGENT	STATUS
USTA Trainers Group 2024	Group	USSG104518	28-Apr-2024	14-Dec-2023	OVSCI	KK

9. To keep the changes, click **Save**.
10. Click **Discard** to discard all changes.
11. Click **Exit** to discard any changes.

EXIT

About the Pax CRM Fields

Pax Name - Surname

The last name (surname) of the passenger.

Pax Name - First Name

The first name (Christian name or forename) of the passenger. This field will be available if the Pax Surname is entered.

Group Name

The name of a group passengers.

About the Pax Search Fields



» The capitalisation or case is irrelevant in the Booking header search; 'BROW' will return the same results as 'brow'.

Surname Starts With

This field will be empty. Enter a search string - search is done on the Booking name beginning with the entered search string.

Surname Contains

As with Surname Starts With, this field will be empty. This is a string search facility; i.e. it will find Bookings matching any combination of consecutive characters entered in the field, regardless of where in the Booking name the string occurs.

First Name Starts With

This field will be empty. Enter a search string - search is done on the Booking name beginning with the entered search string.

First Name Contains

As with First Name Starts With, this field will be empty. This is a string search facility; i.e. it will find Bookings matching any combination of consecutive characters entered in the field, regardless of where in the Booking name the string occurs.

Agent

Selecting an agent will limit the search to only Bookings for that agent.

Customer Number

Specifying the unique customer number will limit the search to bookings with the specific reference.

Passport Name Contains

Entering a Passport Name will limit the search to Bookings and return results based on the Passport Name Contains entry.

Passport Number

Specifying the a passport number, (if known and entered against the passenger profile in a booking) will limit the search to bookings with the specific passport number selected.

Contact Details Filter

Specific contact details can return results based on an email address or a phone number. This is a handy tool if you do not have the clients name on hand.

Group Filters

Group Name starts with allows you to search for passengers who were included in a particular group of travellers.

Group Search

The Pax CRM is a stand alone application which can be found in the Operations Menu. You will require the correct security settings to be able to gain access to this application. The Pax CRM stores each customer name with their unique ID number.

Searching by group enables users to search for CRM Group details and names associated with that group. Once located individual details can be edited or deleted.

NOTE: The term "Group" used here should not be confused with the same word used in Group Bookings. In the CRM context it is a 'title' that relates pax names - i.e. all Pax in one booking are Grouped under. By default, in FITs and Groups the booking name is used as the Group Name, but it can be edited.

Find existing passenger in the CRM

1. Select **Menu Home > Operations > Pax CRM**.
2. Search for the Passenger either by Group.
 - a. Entering the Group Name and select **search**.



- b. Or if the group name is unknown select **search** to enter more advance filters for searching.



Pax Group Search CLEAR EXIT SEARCH

SELECTION **RESULTS**

AGENT

GROUP NAME STARTS WITH

SURNAME STARTS WITH

ADDRESS CONTAINS

POST CODE

CUSTOMER NO.

PASSPORT NAME CONTAINS

PASSPORT NUMBER

- c. Click **Search**.

3. A full list of passenger names matching your search will return, click on the **name of the passenger** to view their entered details.

Pax Search CLEAR EXIT SEARCH

SELECTION **RESULTS**

CUSTOMER NO.	SURNAME	FIRST NAME	PAX TYPE	DATE OF BIRTH
7670	Lindsay	Adrienne	Child	25-Apr-2012
7668	Lindsay	Alfred	Adult	
7669	Lindsay	Anne	Adult	

4. View passenger records from the **Details Tab** where the pax full name, alias and date of birth can be noted on the upper section of the screen. The middle section allows storage of passport details and contact information specific to this passenger, with the lower section of the screen allowing any information defined by your organisation, e.g. Special Requirements, to be entered for the passenger.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS PROFILE GROUPS BOOKINGS

PAX NAME

TITLE	Mr	TITLE ALIAS	
FIRST NAME	Alfred	FIRST NAME ALIAS	
SURNAME	Lindsay	SURNAME ALIAS	
PAX TYPE	Adult	DATE OF BIRTH	

PASSPORT DETAILS

PASSPORT NAME		PLACE OF ISSUE	
PASSPORT NUMBER		ISSUED ON	
NATIONALITY		EXPIRES ON	

USER DEFINED TEXT

SPECIAL REQUIREMENTS

- Unique passenger profile entries are available from the **Profile Tab**. This is where organisations may choose to store visa information, loyalty membership numbers or special requirements. The setup of these headings is detailed in the System Setup User Manual.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS **PROFILE** GROUPS BOOKINGS

CATEGORY	VALUE	EXPIRY
Profile		
Passport Details		
Membership		
Loyalty Program	Air NZ/Star A # 12345	28-Oct-2026
Loyalty Program	Hilton Honors # 555	03-Jul-2030
Analysis Data		

INSERT DELETE

You can see in this example that Mr Alfred Lindsay is a member of two loyalty programs (Air NZ and Hilton Honors and his loyalty numbers and expiry dates have been recorded for both).

- The **Groups Tab** provides the ability to view if the passenger is linked in a group of travellers.

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS PROFILE **GROUPS** BOOKINGS

GROUP NAME	ADDRESS 1	TYPE
USTA Trainers Group 2024	USTA - 6487 Main Highway	DG

- A list of bookings the passenger has previously been named in can be viewed or selected from the **Booking Tab**.

INSERT PAX EXIT

PAX NAME

GROUP NAME

Pax Details: Lindsay/Mr/Alfred ADD GROUP DELETE DISCARD SAVE

DETAILS CONTACTS PROFILE GROUPS **BOOKINGS**

BOOKING NAME	BOOKING TYPE	REFERENCE	TRAVEL DATE	ENTERED	AGENT	STATUS
USTA Trainers Group 2024	Group	USSG104518	28-Apr-2024	14-Dec-2023	OVSCHI	KK

- To keep the changes, click **Save**.
- Click **Discard** to discard all changes.
- Click **Exit** to discard any changes.

EXIT

About the Pax CRM Fields

Pax Name - Surname

The last name (surname) of the passenger.

Pax Name - First Name

The first name (Christian name or forename) of the passenger.

Group Name

The name of a group passengers - Enter the first few characters of a Group name (if known) and click the search icon.

About the Group Advance Search Fields

NOTE: When entering selection filters, remember that the more filters entered, then a) the less data will be returned and b) the possibility of error is greater. For example, if all 8 selection fields have a value entered, and there is a spelling or numerical error in one of them, nothing will be returned.

Agent

Clicking the dropdown arrow will display a list of Agents Names in alphabetical order. Clicking in the blank Agent field and typing the first letter of the agent name, will scroll from that point. Clicking the search icon will display a further search screen, this allows users to search for added detail relating to the agent such as; Language; IATA Code; Master Agent details; or Analysis Codes.

Group Name Starts With

Enter the first few characters of a Group name (if known) and click the search icon.

Surname Starts With

Enter the first few characters of the Surname (last name - if known) and click the search icon.

Address Contains

Enter a word or letters that may be in any of the Group address detail field.

Postcode

Enter the Group Address Postcode (if known). The postcode must be complete - e.g. '805' will not locate '8052'.

Customer Number

This field refers to an internal system generated number and is used principally by Tourplan support staff.

Passport Name Contains

Enter a name of letters that may be in the Pax Passport Name Field.

NOTE: This field cannot be searched on in isolation - there must be search parameters in at least one of Agent or Group Name, Pax Name, Customer Number or Passport Number.

Passport Number

Specifying the a passport number that is in the Pax Passport Number Field.

APPENDIX

Supporting Information

The appendix includes reference material and supporting information that supplements this document's chapters.

In this chapter ...

About Changing Default Column Headings226

About Changing Default Column Headings

Change Default Column Headings

- 1. Click anywhere in the white space of a list's column headings.
- 2. On the **Set Column Defaults** screen, click a column heading label in the Available Columns list.
The  button will become live. Click the  and the column name will move to the Table Columns List. Use the  and  buttons to move the column names into the required order. To remove a column from the Table Column list, highlight it and click the  to return it to the Available Columns List.
- 3. The check boxes can be used to make a column bold. The width of columns can be adjusted in the Width column.
- 4. Click **Save** to keep the changes.
- 5. The list is immediately updated to reflect the new defaults chosen.

Booking Operations

All column headings are now visible when screen scrolling is activated.

Substitute Service Columns

In the example below the default Location, Service, Supplier, Code, Description, Booking Name, Booking Ref, Travel Date, Date and Status headings are showing.

FILTER ANALYSIS RESULTS									
LOCATION	SERVICE	SUPPLIER	CODE	DESCRIPTION	BOOKING NAME	BOOKING REF	TRAVEL DATE	DATE	STATUS

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults

EXIT RESET SAVE

AVAILABLE COLUMNS

COLUMN

Location Name

Service Name

Supplier Name

Local Supplier Name

Booking Name Alias

Destination

Destination Name

Country

Country Name

TABLE COLUMNS

COLUMN

HIGHLIGHTED?

WIDTH

Location

☐

200

Service

☐

80

Supplier

☐

80

Code

☐

80

Description

☐

200

Booking Name

☐

200

Booking Ref

☐

110

Travel Date

☐

90

Date

☐

90

Status

☐

80

PU/DO Details

☐

200

WRAP IN WIDE COLUMNS

☐

Book On Columns

In the example below the default Package Name, Master Group, Allocation Date, Max, Used, Unused, Utilisation and Status headings are showing.

FILTER RESULTS							
☐	PACKAGE NAME	MASTER GROUP	ALLOCATION DATE	MAX	USED	UNUSED	UTILISATION STATUS

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the

Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Column Heading	Description
*Package Name	The package (PCM) name.
*Master Group	The group booking reference.
*Allocation Date	The package departure date (Allocation date).
*Max	The maximum number of spaces on the package as set up in the allocation.
*Used	The number of spaces (pax) booked on the package.
*Unused	The number of spaces left on the package.
*Utilisation	percentage of space used on the package.
*Status	The status of the package in relation to the Group booking that will operate the package. Possible statuses are: » Link Required. A Group Booking has not yet been created. » Re-Link Required. The system has detected additional FIT bookings or changes to existing FIT Bookings that are not included in the Group Booking. » Linked. The Group Booking has been created and all FIT Bookings have been linked.
Package Name Alias	The alternative (PCM) package name (if used).

iCOM Activity Columns

In the example below the default Travel Date, Booking Name, Booking Ref, Agent, Activities, Errors and Last Activity headings are showing.

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Column Heading	Description
* Travel Date	Booking Travel Date.
* Booking Name	Booking Name.
* Booking Ref	Full booking reference of booking. With Branch/Department and numerical code.
* Agent	Agent/Debtor Code.
* Activities	
* Errors	Reported errors noted.
* Last Activity	Date of last activity.
Booking Name Alias	The booking name alias, if alias field is used.
Agent Contact	Agent contact name.

Email Management Columns

In the example below the default Email Management columns are, Status, Received, From, and Subject.

☐ STATUS RECEIVED ☐ FROM SUBJECT

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults EXIT RESET SAVE

AVAILABLE COLUMNS		TABLE COLUMNS		
COLUMN		COLUMN	HIGHLIGHTED?	WIDTH
Email Account		Status	☐	85
Email Type		Received	☐	85
Code		From	☐	165
Name		Subject	☐	165
Booking Ref				
Booking Name				

WRAP IN WIDE COLUMNS ☐

Queue Management Columns

In the example below the default Queue To, Assigned To, Sent By, Entered, Due, Status and Message are showing.

QUEUE PCM ANALYSIS BOOKING ANALYSIS SERVICE ANALYSIS **RESULTS**

☐ QUEUE TO ASSIGNED TO SENT BY ENTERED DUE STATUS MESSAGE

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults

AVAILABLE COLUMNS

COLUMN

Booking

Booking Alias

Ref

Travel Date

Voucher

Service Date

PCM Name

PCM Name Alias

Pcm Service Line

Agent Code

Agent

Local Agent

Supplier Code

TABLE COLUMNS

COLUMN

HIGHLIGHTED?

WIDTH

Queue To

Assigned To

Sent By

Entered

Due

Status

Message

EXIT

RESET

SAVE

WRAP IN WIDE COLUMNS

Column Heading	Description
* Queue To	User or Group queue the message was assigned to.
* Entered	Date message entered.
* Due	Message due date.
* Status	Message status.
* Message	Message text.
Booking	Booking Name.
Booking Alias	Booking Name Alias.
Ref	Booking Reference.
Travel Date	Travel Date of Booking.
Booking Consultant	Booking Consultant Initials.
Booking Consultant Name	Booking Consultant Name.
Voucher	Voucher Number.
Service Date	Service Line Service Date.
PCM Name	PCM Name.
PCM Consultant	PCM Consultant Initial.
PCM Consultant Name	PCM Consultant Name.
PCM Service Line	PCM Service Line.
Agent Code	Booking Agent Code.
Agent	Booking Agent Name.
Supplier Code	Supplier Code.
Supplier	Supplier Name.
Def. Code	Queue Definition Code.
Def. Name	Queue Definition Name.
Scope	Queue Scope. (Agent, Booking, Booking Service Line, General, PCM, PCM Service Line, Supplier or User).

Recalculate All Bookings Columns

In the example below the default Booking Name, Consultant, Booking Ref, Travel Date, Agent and Last Service Date headings are showing.

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BOOKINGANALYSISRESULTS

SELECTED0FOUND24SELECT ALLUNSELECT ALL

☐BOOKING NAMECONSULTANTBOOKING REFTRAVEL DATEAGENTLAST SERVICE DATE

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults

EXITRESETSAVE

AVAILABLE COLUMNS

COLUMNCOLUMN

Booking Name Alias

Status

Booking Type

TABLE COLUMNS

COLUMNHIGHLIGHTED?WIDTH

Booking Name

Consultant

Booking Ref

Travel Date

Agent

Last Service Date

WRAP IN WIDE COLUMNS

Recalculate All PCM Quotes Columns

PCM

ANALYSISRESULTS

SELECTED0FOUND10SELECT ALLUNSELECT ALL

☐BOOKING NAMECONSULTANTTRAVEL DATEAGENTLASTWORKDATE

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults

EXITRESETSAVE

AVAILABLE COLUMNS

COLUMNCOLUMN

Booking Name Alias

TABLE COLUMNS

COLUMNHIGHLIGHTED?WIDTH

Booking Name

Status

Consultant

Travel Date

Agent

Booking Type

LastWorkDate

WRAP IN WIDE COLUMNS

Recalculate All Services Columns

BOOKINGANALYSISSERVICEANALYSISRESULTS

SELECTED0FOUND0SELECT ALLUNSELECT ALL

☒DATEVOUCHER SUPPLIERCODEDESCRIPTIONBOOKING REFSTATUS

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the

Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults [EXIT] [RESET] [SAVE]

AVAILABLE COLUMNS	TABLE COLUMNS
COLUMN	COLUMN HIGHLIGHTED? WIDTH
Supplier Name	Date ☒ 50
SupplierNameLocal	Voucher ☐ 90
Master Code	Supplier ☐ 80
Booking Name Alias	Code ☐ 80
Agent	Description ☐ 200
Chain Master	Booking Ref ☐ 110
Agent Name	Status ☐ 80
Local Agent Name	
Status	
Travel Date	
Consultant	
Consultant	
Booking Type	

WRAP IN WIDE COLUMNS ☐

Bulk Documentation

All column headings are now visible when screen scrolling is activated.

Bulk Supplier Messaging Columns

In the example below the default Date, Voucher Supplier, Code, Description, Booking Reference, and Status headings are showing.

Bulk Supplier Messaging - Accommodation NB Service Status for KK Booking Statu [COPY FILTER] [SAVE FILTER] [DELETE] [EXIT] [SEND]

BOOKING ANALYSIS SERVICE ANALYSIS RESULTS

SELECTED 0 FOUND 236 [SELECT ALL] [UNSELECT ALL]

DATE	VOUCHER	SUPPLIER	CODE	DESCRIPTION	BOOKING REF	STATUS
------	---------	----------	------	-------------	-------------	--------

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list or highlighted, and column widths can be customised depending on user requirements.

Set Column Defaults [EXIT] [RESET] [SAVE]

AVAILABLE COLUMNS	TABLE COLUMNS
COLUMN	COLUMN HIGHLIGHTED? WIDTH
Supplier Name	Date ☒ 50
Local Supplier Name	Voucher ☐ 90
Master Code	Supplier ☐ 80
Booking Name	Code ☐ 80
Booking Name Alias	Description ☐ 200
Agent	Booking Ref ☐ 110
Chain Master	Bkg Status ☐ 80
Agent Name	
Local Agent Name	
Travel Date	
Consultant	
Consultant	
Booking Type	
Pax Nationality	

WRAP IN WIDE COLUMNS ☐

* indicates a column in the default view.

Column Heading	Description
* Date	Service date
* Voucher	Voucher number
* Supplier	Supplier Code
* Code	Service code
* Description	Service description
* Booking Ref	Booking reference
* Bkg Status	Status of booking
Supplier Name	Supplier full name or label
Local Supplier Name	Alternative supplier name
Master Code	Master supplier code
Booking Name	Name of booking
Booking Name Alias	Alternative name of booking
Agent	Agent code
Chain Master	Master agent code
Agent Name	Agent full name or label
Local Agent Name	Alternative agent name
Status	Service status
Travel Date	Booking travel date
Consultant	Consultant code
Consultant	Consultant name
Analysis 1-6	Booking analysis 1-6
Country	Country code of service
Destination	Destination code of service
Location	Location code of service
Location Name	Location name
Service	Service type code
Service Name	Service type description
Price Code	Price code
Voucher Status	Voucher Status
Pickup	Pick up date
Pickup Time	Pick up time
Pickup Remarks	Pick up remarks
Dropoff	Drop off date
Dropoff Time	Drop off time
Dropoff Remarks	Drop off remarks
Remarks	Service Line Remarks
Last Worked Date	Last worked date

Bulk Voucher Messaging Columns

In the example below the default Date, Voucher Supplier, Code, Description, Booking Reference, and Status headings are showing.

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Bulk Agent Messaging Columns

In the example below the default Booking Name, Consultant, Booking Ref, Travel Date, Agent and Last Service Date headings are showing.

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

* indicates a column in the default view.

Column Heading	Description
*Booking Name	Name of booking
*Consultant	Consultant code
*Booking Ref	Booking reference
*Travel date	Travel date on booking
*Agent	Agent code
*Last Service Date	Date of last service
Bkg Status	Booking status
Booking Name Alias	

Resource Assignments

All column headings are now visible when screen scrolling is activated.

New Assignment Columns

In the example below the default Group, Booking, Product, Pax and PU/DO Details headings are showing.

BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
☐	GROUP	BOOKING	PRODUCT	PAX PU/DO DETAILS

Users can click outside of the column headings within the header line to set column defaults. When the Set Column Defaults form appears, columns can be moved from the Available Columns list to the Table Columns list. Columns with the Highlighted checkbox selected will display the column information in bold, and column widths can be customised depending on user requirements.

Set Column Defaults
EXIT RESET SAVE

AVAILABLE COLUMNS

TABLE COLUMNS

COLUMN	HIGHLIGHTED?	WIDTH
Booking Alias	☐	
Product Alias	☐	
Product And Package	☐	
Product And Package Alias	☐	
Status	☐	
Pickup	☐	
Pickup Time	☐	
Pickup Remarks	☐	
Dropoff	☐	
Dropoff Time	☐	
Dropoff Remarks	☐	
Remarks	☐	

COLUMN	HIGHLIGHTED?	WIDTH
Group	☐	100
Booking	☐	200
Product	☐	200
Pax	☐	90
PU/DO Details	☐	250

WRAP IN WIDE COLUMNS
☐

Resource Assignment Columns

Column Heading	Description
* Start Date	Service start date
* Name	Assignment name
* Assignment Type	Assignment type (Single, Independent, or Hop on Hop off)
* Status	Assignment status
* Pax	Number of pax
* Bookings	Booking number for assignment
* Driver	Driver initials
* Vehicle	Vehicle code
* Guide	Guide initials

Column Heading	Description
End Date	Service end date
Driver Description	Driver description (often the full Name of driver)
Vehicle Description	Vehicle description (often the name, make model or registration of vehicle)
Guide Description	Guide description (often the full Name of guide)

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