



FITs User Manual

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CHAPTER 1

Getting Started with FITs

This Document describes the main functions associated with the Tourplan FITs application, which enables FIT bookings and quotes to be created, changed and deleted.

Quotations and bookings are handled almost identically in FITs. They are differentiated only by the booking status code applied to the booking and the rules associated with each status code. All quotes and bookings are simply defined as 'Bookings' in this document.

FITs accesses the Tourplan Product Database (and suppliers systems directly if the Connectivity Edition is installed) to allow instant recall of products, costs, availability, etc. Prices are calculated automatically for each service added to a booking based on the travel date and agent specific settings.

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

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

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About the User Manuals




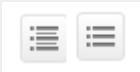
The user manuals for Tourplan NX are a set of manuals, available both online and in print, that assist users to use the system.

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

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

User Manuals are available when logged into [MyTourplan](#).

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

Convention	Icon / Style	Definition
Any field, button or screen area	<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 .


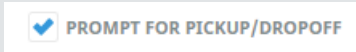
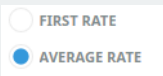
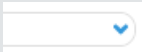
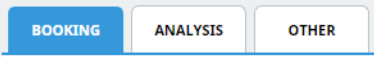

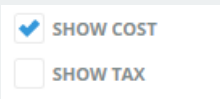
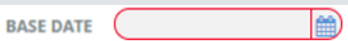


Getting Started With Tourplan NX

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 Tourplan-NX Menu

The Hamburger Menu

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



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

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

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

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

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

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

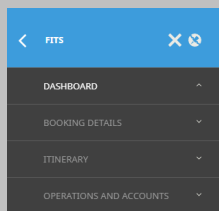
Menu Changes with Selections

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

Example: FITs Menu

Bookings and Quotes > FITs

The menu view once a booking is selected or created:



Menu Breadcrumb Trails

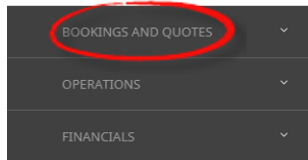
Earlier in this topic, we referred to a *menu breadcrumb trail* (**Home > Bookings and Quotes > FITs**). The meaning of this is straightforward; start with menu option **Home**, then select sub menu **Bookings and Quotes** and finally select **FITs**. This breadcrumb trail is expanded in the sequence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

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

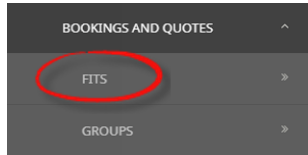


Home

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



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



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

About Quick Links

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

About the Landing Page

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

- » **Recently Worked On** - Bookings or PCMs.
- » **Travelling Soon** - Bookings.
- » **My Messages** - Internal Messages or reminders sent between consultants.
- » **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.

UI Display

The Tourplan User Interface can be configured to respond to the size of the screen its being used on. This can be configured as a company wide setting for all users or configured using individual user settings. More information on UI configuration is available on our Knowledge Base.

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, FITS, BOOKINGS AND QUOTES, OPERATIONS, FINANCIALS, PRODUCTS, REPORTS, and SYSTEM. The main area has a header with 'Home', a user profile for 'PA-NAOMIJOHNS', and a 'Header' title. Below the header are four sections: 'Recently Worked On' (with tabs for BOOKINGS and PCMS), 'Travelling Soon', 'My Messages', and 'Useful Links'. A large watermark 'Body (4 Sections)' is overlaid on the right side of the dashboard.

BOOKING NAME	BOOKING REF	LAST WORKED DATE
Robson Mr & Mrs K	USFI104678	08-Aug-2022 09:51
Whyte Mr & Mrs B	USFI104684	03-Aug-2022 14:30
Richardson Mr & Mrs A	USFI104685	03-Aug-2022 14:27
Shepard Mr & Mrs B	NZFI104680	03-Aug-2022 14:09
Dance NZ	NZGP104682	02-Aug-2022 10:07
Cycling NZ	NZGP104681	02-Aug-2022 09:39
Harness Racing Victoria NZ	NZGP104679	02-Aug-2022 08:44

MESSAGE	BOOKING REF	SENT BY	DUE	ENTERED
Naomi, Can you reply to thi...		PA-GEOFFBEAVER	05-Nov-2024 14:45	05-Nov-2024 14:36:44
Message received and retur...		PA-GEOFFBEAVER	23-Jan-2025 00:00	23-Jan-2025 14:31:40
Another test queue messag...	NZFI104640	PA-GEOFFBEAVER	23-Jan-2025 15:00	23-Jan-2025 14:50:52

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

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.

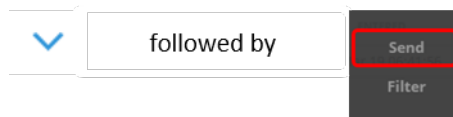
NOTE: Queued Message functions are covered in more detail within the applicable user manuals.

Respond to a Message in My Messages

Messages can be responded to and the message status updated.

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

2. Modify any fields that might need updating and click **Save**.
3. To send a new message, click the blue **Drop-Down Icon** at the top right of the My Messages section and then click **Send**.

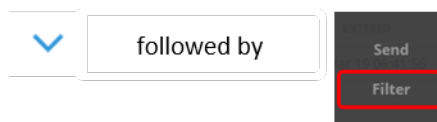


4. On the new **Queue Message** screen, assign an internal queue message to one or more colleagues. The message can identify a specific booking/PCM, Agent or Supplier for reference.

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



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



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

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

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.

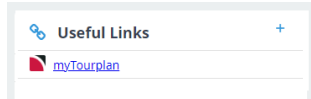


The URLs on a user's desktop may differ from those of another user.

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	<input type="text"/>
URL	<input type="text"/>
SEQUENCE	<input type="text"/>

Logging Out

The correct procedure to follow when logging out is to return to the landing page and use log out. This will free a user licence for others in your organisation to log in. If you were to simply close the Tourplan module tabs your user licence will still be active.



User companies may have a maximum number of users who have access to Tourplan at any given time. A message will display, indicating that the maximum number of active users is exceeded and a licence will need to be made available. Logging out using the procedure below will quit the active user's licence to allow another user to log in.

Logging out

1. From the **landing page** select the blue drop down arrow.

BOOKING NAME	BOOKING REF	LAST WORKED DATE
Robson Mr & Mrs K	USFI104678	08-Aug-2022 09:51
Whyte Mr & Mrs B	USFI104684	03-Aug-2022 14:30
Richardson Mr & Mrs A	USFI104685	03-Aug-2022 14:27
Shepard Mr & Mrs B	NZFI104680	03-Aug-2022 14:09
Dance NZ	NZGP104682	02-Aug-2022 10:07
Cycling NZ	NZGP104681	02-Aug-2022 09:39
Harness Racing Victoria NZ	NZGP104679	02-Aug-2022 08:44

MESSAGE	BOOKING REF	SENT BY	DUE	ENTERED
Naomi, Can you reply to this when ...		PA-GEOFFBEAVER	05-Nov-2024 14:45	05-Nov-2024 14:36:44
Message received and returned :-)		PA-GEOFFBEAVER	23-Jan-2025 00:00	23-Jan-2025 14:31:40
Another test queue message - this ...	NZFI104640	PA-GEOFFBEAVER	23-Jan-2025 15:00	23-Jan-2025 14:50:52

2. The logout screen will show, select **Logout**.



NOTE: This will return you to the log in screen.

About the Logout Options

Settings

If the user has the appropriate level of security, they will have Change Password available. Selecting Change Password will allow the user to manually change their password and select a date as to when the password will expire.

Change Password

EXIT

SAVE

OLD PASSWORD

NEW PASSWORD

PASSWORD REPEAT

PASSWORD EXPIRES

27-Jul-2019

Language

Allows the user to select a language if the system has been configured to allow multiple languages.

Version

The NX version of Tourplan.

Edition

The software edition installed - either Small Business, Professional or Enterprise.

Adding FITs Code Data

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

- » Booking Status Codes
- » Booking Consultants
- » Analysis Codes (optional)

NOTE: If Booking Consultants have already been set up under PCMs, they will be available here. Refer to the [PCM Packages User Manual](#) for more information on setting-up Booking Consultants within PCMs.



Many of these settings would have been established in the system at the time of system setup, booking status codes will have been reviewed and finalised by Senior Management. Selection of pre determined booking status will occur from within FIT's and any requirement to amend the booking status options available should be discussed with your dedicated Tourplan expert.

Booking Status Codes

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

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

Example: Booking Status - Confirmed

Booking Status

INSERT

STATUS	DESCRIPTION	INTERNET DESCRIPTION	INTERNET READONLY	VOUCHER	REGENERATE	DELETED	ALLOCATION	AUTO MESSAGE	ACCOUNTABLE
DP	Deposit Invoice	Deposit Invoice	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
FL	Finalised	Confirmed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
IN	Invoiced	Confirmed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
KK	Confirmed	Confirmed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
QU	Quotation	Quotation	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
XC	Cancelled With Cost	Cancelled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
XX	Cancelled	Cancelled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Booking Status

NEW

EDIT

SAVE

CODE

DESCRIPTION

INTERNET DESCRIPTION

FUNCTIONS ALLOWED FOR THIS STATUS

INTERNET READONLY

VOUCHER

REGENERATE

DELETED

ALLOCATION

AUTO MESSAGE

ACCOUNTABLE

Service Status Codes

The current status of a service is indicated by a Service Status Code and at least one must exist before a service can be inserted.

There can be different status codes to indicate the various stages of the service workflow; e.g., Initial, Requested, Amended, Confirmed, Working, Travelling, Invoiced, Finalised etc. The example below shows a list of typical service status codes. Each user company's procedures will determine the service status codes and workflow requirements specific to their organisational needs.

Example: Service Status - Confirmed

Service Status								INSERT
CODE	DESCRIPTION	VOUCHER	ALLOCATION	INCLUDE IN	PCM	CANCEL FEES	INTERNET STATUS	AMEND
	Unassigned	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
AK	Amended from KK	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
AR	Amended from RQ	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
AW	Amended from WL	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
IS	Initial Status	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
IT	Itinerary Only	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
KA	Conf from Allocation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
KF	Confirmed Freesale	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
KK	Confirmed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
NB	Not Booked	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
OP	Optional Service	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
PA	Partial Allocation	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
PS	Package Service	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
QO	Quote Only	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
RQ	On Request	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
UC	Unable	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
WL	Waitlisted	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>
XC	Cancelled - Charge	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Undefined	<input type="checkbox"/>
XX	Cancelled	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Undefined	<input type="checkbox"/>

Booking Consultants

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

- Create a consultant entry
- Bind the entry to a user ID

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

Everything is now ready for this consultant to create a new FIT booking.

NOTE: If the consultants role requires them to create PCM's or Group bookings this procedure will need to be applied in INI Settings for Groups and PCMs.

Analysis Codes (Optional)

Up to 6 booking analysis codes can be attached to a booking. On system installation, the codes are simply labelled Booking Analysis 1 - Booking Analysis 6 and they do not display in this menu node until they have been labelled in the INI Settings application.

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

Analysis codes are not required for creating an FIT Booking, but they are needed when analysing and reporting on your bookings later. The following examples show lists of typical analysis codes and provide a sample of Booking Analysis field data.

Example: Lists of Booking Analysis Codes

Booking Type		Pax Nationality		Source	
CODE	DESCRIPTION	CODE	DESCRIPTION	CODE	DESCRIPTION
	Unassigned		Unassigned		Unassigned
CO	Conference	AR	Argentina	01	Wholesaler
FA	Fam Trip	AU	Australia	02	Travel Agent
IC	Incentive	CA	Canada	03	Direct
PK	Package	CH	China	04	Brochure
SE	Series	CR	Costa Rica	05	Website
SI	Special Interest	CZ	Czechia	06	Advertisement
TM	Tailor Made/Bespoke	FR	France	07	Travelled Before
		GE	Germany	08	Internet
Markup M/A		HK	Hong Kong	Doc's Status	
CODE	DESCRIPTION	HU	Hungary	CODE	DESCRIPTION
	Unassigned	IN	India		Unassigned
MA	Manual	IT	Italy	FN	Finalised
Reason Refused		MA	Malaysia	IP	In Production
CODE	DESCRIPTION	MX	Mexico	RQ	Requested
	Unassigned	NE	The Netherlands		
01	Price	NZ	New Zealand		
02	Unable to Travel	PE	Peru		
03	Booked Elsewhere	PN	Panama		
04	Service	PO	Poland		
05	Illness	RU	Russia		
		SA	South Africa		

Quick Steps

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

- Getting Started with FITs:
 - [Document Conventions](#)
 - ["About the Tourplan-NX Menu" on page 10](#)
 - ["Adding FITs Code Data" on page 18](#)
- Creating New FIT Bookings:
 - ["Create an FIT Quote/Booking" on page 23](#)
 - ["Set Room Configurations" on page 27](#)
 - ["Enter Pax Details" on page 29](#)
 - ["Add Services to an FIT Booking" on page 35](#)
 - ["View Completed Quote" on page 50](#)
- Managing Existing FIT Bookings:
 - ["Retrieve an Existing Quote/Booking" on page 55](#)
 - ["Booking Details " on page 67](#)
 - ["Itinerary Menu" on page 92](#)
 - ["Operations and Accounts " on page 123](#)
 - ["Creating Invoices" on page 127](#)

CHAPTER 2

Creating FIT Quotes

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

Creating new FIT bookings is straightforward and intuitive using Tourplan NX. This chapter describes the creation of a new booking, initiated from the FITs page using button **Insert New Booking** or **Product Search**.

The steps covered include entering basic booking details, such as booking name, travel date, pax names and room configurations, and how to add services to the booking. Examples of services are transfers, rental cars, sightseeing tours and package deals. The order of steps used to insert booking information is covered in more detail in [Create an FIT Booking](#).

A quote booking status selection on booking insert provides the ability to quote rates and a Convert Quote function triggers the conversion of the quote into a booking. The procedures in this User Manual to Create a Booking assumes that a quotation status is selected when the booking is created.

In this chapter ...

An Example FIT Booking	22
Create an FIT Quote/Booking	23
Set Room Configurations	27
Enter Pax Details	29
Add Services to an FIT Booking	35
Setup Configuration During Service Insert	41
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Package Insert	48
View Completed Quote	50

An Example FIT Booking

The Dashboard View of a typical FIT Booking (once created) is shown in the example.

Example: Completed FIT Booking - Dashboard View

NAME	Robson Mr & Mrs K	REFERENCE	USF1104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Confirmed

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...	156.80
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00
23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	
23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	89.96
23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...	741.49
24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise	100.86
24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...	2,118.16
25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	218.09
25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	618.82
26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)	79.06
26 Apr	ROT	Rotorua Museum	Admission To Museum	38.08
26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa	53.76
26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert	272.61

BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)	
COST	10,020.84	MARKUP (21.34%)	2,137.96	INVOICES	0.00
RETAIL	12,158.80	COMMISSION (0.00%)	0.00	RECEIPTS	0.00
AGENT	12,158.80	TAX	1,585.93	TO BE INVOICED	12,158.80
AGENT (TAX INCLUSIVE)	12,158.80	MARGIN (17.58%)	2,137.96	TOTAL DUE	0.00

What next?

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

1. ["Create an FIT Quote/Booking" on the facing page](#)
2. ["Set Room Configurations" on page 27](#)
3. ["Enter Pax Details" on page 29](#)
4. ["Add Services to an FIT Booking" on page 35](#) or ["Package Insert" on page 48](#)

The last section in this chapter, ["View Completed Quote" on page 50](#), covers two common views available for examining a booking once it is created; the **Dashboard** view and the **Itinerary** view.

Create an FIT Quote/Booking

The procedures in this topic describe the initial steps needed to create a new FITs Quote/Booking.

A booking can be entered as a quotation or as a confirmed live booking. This User Manual assumes that a Quotation booking status is selected and follows a procedure to convert the quotation into a booking.

For more information on booking status selection please see ["About the Create Booking Fields" on the next page](#).

Create an FIT Booking - Insert New Booking

1. From the Home menu, select **Home > Bookings and Quotes > FITs**.
2. Click **Insert New Booking**.
3. On the empty **Create Booking** screen, give this booking a name and enter data into other fields as required. Refer to ["About the Create Booking Fields" on the next page](#) for more information on the data you can enter.

The screenshot shows the 'Create Booking' form. The title 'Create Booking' is circled in red. Below it, there are fields for NAME, NAME ALIAS, TRAVEL DATE, AGENT, and BOOKING STATUS (set to 'QU - Quotation'). To the right, there are fields for CURRENCY, CURRENCY SUBCODE (set to 'Standard'), BRANCH, DEPARTMENT, and BOOKING REF (set to '104568'). Below these is the 'ROOM CONFIGURATION' section with radio buttons for 'TWO ADULTS IN A DOUBLE' (selected), 'TWO ADULTS IN A TWIN', 'ONE ADULT IN A SINGLE', and 'OTHER CONFIGURATION'. At the bottom, there is a table for room details:

	ADULTS	CHILDREN	CHILD AGES	INFANTS	INFANT AGES	
Room 1	2	0		0		Double


This completed example shows an FIT booking named **Robson Mr & Mrs K**.

The screenshot shows the 'Create Booking' form with a completed example. The title 'Create Booking' is circled in red. The fields are filled with the following data:

Field	Value
NAME	Robson Mr and Mrs K
NAME ALIAS	
TRAVEL DATE	22-Apr-2025 Tuesday
AGENT	SPBBRY - South Pacific & Beyond
BOOKING STATUS	QU - Quotation
CURRENCY	NZD - New Zealand Dollars
CURRENCY SUBCODE	Standard
BRANCH	US - USA Office
DEPARTMENT	FI - FIT
BOOKING REF	104568

Below the form, the 'ROOM CONFIGURATION' section shows 'TWO ADULTS IN A DOUBLE' selected. The room details table is the same as in the previous screenshot.

NOTE: This particular example is a booking for one couple, needing one room, if additional pax are travelling additional room selection can occur here, or during a service line insert. Room configurations for pax travelling can be complex; the solution is to use the 'Other Configuration' this allows you to enter multiple rooms, topic ["Set Room Configurations" on page 27](#) describes scenarios, rules and procedures for handling alternative room configurations.

4. Do not click Save just yet - continue with procedure ["Enter Pax Details" on page 29](#).
NOTE: If additional pax names are not known, the information can be inserted at a later date using the ["Pax Travelling" on page 72](#) menu.
5. Click **Save** to keep the changes.

6. Click **Exit** to discard any changes.
7. If you click Save, the FIT Booking is created and the **Service Line Insert** screen is displayed.

In this case, click the grey **New Configuration** button and continue with procedure "[Setup a Configuration During Service Insert](#)" on page 42.



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

About the Create Booking Fields

Name

FITs has names at two levels. The top level is the Booking Name and this is used as the prime retrieval field when locating bookings. At the second level, within the booking, are passenger names assigned to Room 1, Room 2 etc.

The booking name and room name are quite often the same; e.g. Robson Mr and Mrs K. There will be instances where the booking name and room name(s) are not the same; e.g. as per the example booking with the booking name Henderson/Anderson Party. There are individual pax names of Henderson Mr/Mrs, Anderson Mr/Mrs and Master, and Hamilton Mr/Mrs.

The screenshot shows the 'PAX' tab selected in the 'ROOM CONFIGURATION' section. Below the tab is a table with the following data:

SURNAME	TITLE	FIRST NAME	PAX TYPE	DATE OF BIRTH	AGE
Anderson	Mrs	Alison	Adult		0
Anderson	Mr	Harry	Adult		0
Anderson	Master	Terry	Child	19-May-2011	14
Hamilton	Ms	Terri	Adult		0
Hamilton	Mr	Tom	Adult		0
Henderson	Mr	Alan	Adult		0
Henderson	Mrs	Alice	Adult		0

At the top of the form, there are fields for NAME (Henderson/Anderson Party), REFERENCE (NZFI104554), TRAVEL DATE (16-Nov-2025), AGENT (OVSTHO - Overseas Travel Ltd - H.O.), CONSULTANT (Lorna), and STATUS (Invoiced). An 'INSERT' button is located at the top right of the table.

NOTE: Booking Names are mandatory; Pax Names are optional.



If the booking name already exists, then subject to system settings, a warning may appear, or a password may be required to continue, or the entry of the name may be denied. If name entry is denied, the booking name has to be altered e.g. add a Period (.) after the passenger(s) name or initials.

Name Alias

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

Travel Date/Day

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



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

Agent

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

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

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

Booking Status

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

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

Quotation: If a quotation status is selected Convert Quote, and Cancel Quote buttons will display and booking statuses are limited to other quotation statuses.

NOTE: Once the booking is converted to a live booking a full list of booking statuses will be available.

Confirmed: If a confirmed status is selected the booking assumes full booking workflow functionality, allowing users to request services, confirm services, take from allocation, process accounts transactions in a live booking.

Currency

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

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

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

Currency Subcode

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

Branch

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

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

Department

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

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



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

Reference

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

Set Room Configurations

The procedures in this topic provide examples of how to setup room configurations for pax travelling.

Scenarios

During the booking process, it is not uncommon to have to alter or add to the Pax/Room configuration to suit changes in pax numbers or accommodation type. This could be for a number of reasons including:

- » Pax entered at time of booking (single room or multi room) and all pax having all services, but room types change during the booking.
- » Pax entered at time of booking (multi-room) and not all rooms having all services; e.g. 1 room not having all accommodation.
- » Pax entered at time of booking (single room or multi-room) and not all pax having all services; e.g. some pax not having a transfer or sightseeing etc.
- » Some pax entered at time of booking (single room or multi-room) and additional pax/rooms added after all services have been entered into booking.

Rules

In Tourplan NX, there are some rules relating to Pax Configurations:

1. *The configuration must exist before it can be used.*

This may sound completely logical, but the system needs to know what the Room Configuration is before services that can cater for it are able to be located in the Product Database. For example if the booking has a basic configuration of 4 adults in 2 doubles and for one accommodation service a two bedroom apartment is required, NX will find the apartment service and room services that accommodate 4 pax either 2 double rooms or an apartment service.

2. *Configurations are bound to services.*

The same configuration can be used and bound to more than one service.

3. *Pax names provide the best outcome for Configurations.*

Pax names are not mandatory, and if not used, internally a name record is created for each passenger. So if a booking is created for Brown/Smith Party, 4 adults in two doubles and no individual pax names entered, the itinerary scroll (displaying who is having which services) will show something like Brown/Smith Party/1, Brown/Smith Party/2, Brown/Smith Party/3 and Brown/Smith Party/4.

When individual pax names are used, the pax names are displayed against their services.

4. *Names are bound to configurations.*

This rule applies to all services, but is more relevant to pax based services than room based services. Pax Names are attached to configurations, so a configuration for the transfer which had three pax on it – e.g., Mr Smith, Mrs Smith and Mrs Brown would be a '3 Adults' configuration. If, for a different service, three different pax were involved – e.g., Mr Smith didn't want a sightseeing tour – then a new '3 adult' configuration will need to be set up for Mrs Smith, Mr Brown & Mrs Brown.

5. *If all pax are having all services, no additional configurations will be needed.*

Example 1: Four adults in two double rooms

ROOM CONFIGURATION

PAX NAME DETAILS

☐ TWO ADULTS IN A DOUBLE
 ☐ TWO ADULTS IN A TWIN
 ☐ ONE ADULT IN A SINGLE
 ☒ OTHER CONFIGURATION

	ADULTS	CHILDREN	CHILD AGES	INFANTS	INFANT AGES	
Room 1	2	0	<input type="text"/>	0	<input type="text"/>	Double
Room 2	2	0	<input type="text"/>	0	<input type="text"/>	Double
Room 3	0	0	<input type="text"/>	0	<input type="text"/>	

Example 2: Eight adults in two doubles, one triple and one single

ROOM CONFIGURATION						PAX NAME DETAILS
<input type="radio"/> TWO ADULTS IN A DOUBLE <input type="radio"/> TWO ADULTS IN A TWIN <input type="radio"/> ONE ADULT IN A SINGLE <input checked="" type="radio"/> OTHER CONFIGURATION						
	ADULTS	CHILDREN	CHILD AGES	INFANTS	INFANT AGES	
Room 1	2	0		0		Double
Room 2	2	0		0		Double
Room 3	3	0		0		Triple
Room 4	1	0		0		Single
Room 5	0	0		0		

Procedures

The following procedures illustrate these scenarios and rules.

Setup a Configuration During the Create Booking Process

It is normal to create the room configuration that will be used for most services when creating the booking.

1. Create a new booking (see "[Create an FIT Quote/Booking](#)" on page 23).
2. On the Create Booking screen, choose the **Other Configuration** radio button.

☒ OTHER CONFIGURATION

When you click Other Configuration, it automatically inserts 2 room lines and, since one of them already has data entered into it, another line automatically opens.

3. In the last room line, choose a configuration for this room. As before, another (blank) room line is automatically added.
4. Continue choosing room configurations until all pax in this booking are accounted for.
5. Continue to "[Enter Pax Details](#)" on the facing page.

About Room Configuration

Select the required room type(s) by using the + button.



NOTE:

- » The room type 'Other' must be used for any room type other than Single, Twin, Double, Triple or Quad. This includes Apartments, Dormitories etc.
- » If the Product Database has had Room Occupancy Policies completed, then the number of adults, children and infants entered into this screen is what the system uses to validate the policies. If the pax configuration in this screen does not meet the policy criteria from the Product Database, then the room type can not be used.
- » Costings for children can be different depending on the number of Adults and Children in the room and what the room type is. FITs will automatically determine the cost depending on this configuration. There are two types of child cost:
 - » **Child.** This where the child is free (or a nominal charge) if sharing the room with adults (and generally using existing bedding). Any charge for a child will have been entered in the Product Database as a 'Child Supplement'. 2 Adults and 1 Child in a Twin room would trigger this type of charge (hotel policy permitting).
 - » **Child Share.** This is where the child is technically occupying an adult space in the room, and the room cost is shared between the adult and the child. 1 Adult and 1 Child in a Twin room is an example of a Child Share.

Enter Pax Details

The procedure in this topic describes how to enter detailed information on pax for a new FIT Booking.

Booking Name vs Pax Names

A booking is referred to by its name; i.e. the Booking Name. As well as the Booking Name, Pax Travelling contains detail of the number and type of pax (adults, children and infants), plus the room configuration. This information is used by Tourplan to automatically cost the services when they are added to the booking.

Individual Pax names and age classifications can be included. Tourplan does not need pax names for costing, however, they can be included on documentation such as vouchers and invoices.

NOTE: Having different name levels means that different documentation can use names in a different format. For example, the Booking Name (e.g. Brown/Smith Party) could be used on messages to suppliers and the Pax Name(s) could be printed on Vouchers, Itineraries and Room Lists.

Room Configurations

Pax are allocated to a room record – a different record is required for each separate room in the booking. Room configurations must accurately reflect the type(s), quantity and configuration of room(s) being used in the booking. For example, if there are two couples (4 adults) in a booking and they want double rooms, then two double rooms must be inserted – the system will not allow four adults in a double room.

FITs also allows rooms to be merged or split on a service-by-service basis within the booking if required. For example, if two couples are in double rooms for the majority of the booking, but at one location sharing a two bedroom apartment, then in the Pax Travelling screen, set up the two double rooms and, during the inserting of the two bedroom apartment service, the two double rooms can be merged into one apartment. Similarly, if one of the couples does not want a particular service, that room can be removed from the service.

Enter Pax Details

1. Create a new booking (see "[Create an FIT Quote/Booking](#)" on page 23).
2. Choose the appropriate room configuration for pax travelling (see "[Set Room Configurations](#)" on page 27).
3. On the Create Booking screen, click **Pax Name Details** to add details for passengers in this booking.

On the **Pax Names** screen, enter data into fields as required and click **OK**. The examples show pax details for the booking in "[Create an FIT Quote/Booking](#)" on page 23.

Pax Names FIND EXISTING PAX EXIT OK

NEW ENTRY CONTACTS PROFILE

PAX NAME

TITLE	<input type="text"/>	TITLE ALIAS	<input type="text"/>
FIRST NAME	<input type="text"/>	FIRST NAME ALIAS	<input type="text"/>
SURNAME	<input type="text"/>	SURNAME ALIAS	<input type="text"/>
<input type="checkbox"/> LEAD PAX		DATE OF BIRTH	<input type="text"/>
PAX TYPE	<input type="text" value="Adult"/>	AGE	<input type="text" value="0"/>

PASSPORT DETAILS

PASSPORT NAME	<input type="text"/>	PLACE OF ISSUE	<input type="text"/>
PASSPORT NUMBER	<input type="text"/>	ISSUED ON	<input type="text"/>
NATIONALITY	<input type="text"/>	EXPIRES ON	<input type="text"/>

USER DEFINED TEXT

SPECIAL REQUIREMENTS	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>
	<input type="text"/>	<input type="text"/>



When the number of names entered matches the count of pax, after entering the last name, the **Create Booking** screen re-appears for the booking details to be displayed.

5. To assign pax to specific rooms click **Pax Name Details**.

PAX NAME DETAILS

6. Examine the **Rooms and Pax** screen, Pax Names will default into an assigned room when the booking was created. Edits can be made before the created booking is saved.

7. If passengers are not assigned to rooms, assign pax:
 - a. Click the first red room description **Double** (it will change to blue **Double**) and assign pax to the room by clicking the green circled **+** icon.
 - NOTE:** You can assign more than two pax names to (e.g.) a Double room – this allows for a child name to be added to the room. If supplier policies are enabled, the policies will dictate whether the configuration is valid on a service-by-service basis.
 - b. Click the second red room description **Double** and assign pax to the second room.
 - c. Continue until all names have been assigned.
8. Open the Contacts Tab, insert client contact details.
9. Insert profile information
10. Click **OK** to keep the changes and save or update the entry.
11. Click **Exit** to discard any changes.
12. If you clicked OK, continue to ["Add Services to an FIT Booking"](#) on page 35.

About the Pax Names Fields

Example: First Passenger Details

Example: Second Passenger Details

Example: Full Pax Details Screen

Passport Details can be inserted against each pax name if you have this information.

Pax Names

FIND EXISTING PAX EXIT OK

DETAILS CONTACTS PROFILE

PAX NAME

TITLE TITLE ALIAS

FIRST NAME FIRST NAME ALIAS

SURNAME SURNAME ALIAS

☒ LEAD PAX DATE OF BIRTH

PAX TYPE AGE

PASSPORT DETAILS

PASSPORT NAME PLACE OF ISSUE

PASSPORT NUMBER ISSUED ON

NATIONALITY EXPIRES ON

USER DEFINED TEXT

SPECIAL REQUIREMENTS

Pax Name

If individual Pax names need to be listed on various Tourplan-generated documents such as vouchers, then enter the names of each passenger within this room, including Title (e.g. Mr.), First Name or Fore-name (e.g. Fred) and Surname (e.g. Smith), plus select Adult, Child or Infant.

Lead Pax

This checkbox becomes active once a pax name is added. The Lead Pax passenger can be designated as the communication contact person for the booking.

Title Alias, First Name Alias, Surname Alias allow passenger name variations typically used to save alternative language text for a passengers name.

Pax Type

This drop-down selection is used to assign a type to the individual pax names being entered. The default is Adult.

NOTE:

- » 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 v the date of the 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 2029. If a DOB is entered which is prior to 1939, it is calculated as 100 years later; e.g. 1937 is calculated as 2037.
- » It is the 'Date of Birth' field which is used to calculate whether children qualify for child rates, not the Age field. An Age can be entered into the Age field, and the Date of Birth field will be calculated, based on the Travel Date being a birthday.

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 On/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)

Pax User Defined Text

These ten fields are available for each passenger (including children) to enter notes that are specific to that passenger.

NOTE: The Pax User Defined fields can be labelled by using the FITs INI settings FB_PAXTEXTLABEL1 - 10, in this example we have used a field heading Special Requirements.

Contacts Tab

Client contact information can be viewed and saved for each passenger.

Inserting Client Contact Information

1. Open the **Contacts Tab**.
2. Click **Insert**.
3. On the **Insert Pax Travelling Contact** screen, select contact type from the dropdown.

Pax Travelling Contact COPY DELETE EXIT SAVE

TYPE: Unassigned

CONTACT NAME: Mr Keith Robson

PHONE NUMBER:

MOBILE PHONE:

FAX NUMBER:

EMAIL ADDRESS:

WEB ADDRESS:

4. Enter a **Contact Type** and relevant **contact details** required.
5. Check the **completed screen**.
6. Click **Save** to keep the changes.

SAVE

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

About Insert Pax Contact Fields

Contact Type

The type of contact.

Examples are: BU-Business HM-Home. These must first be set up in **Code Setup > Messaging > Contact Types**.

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

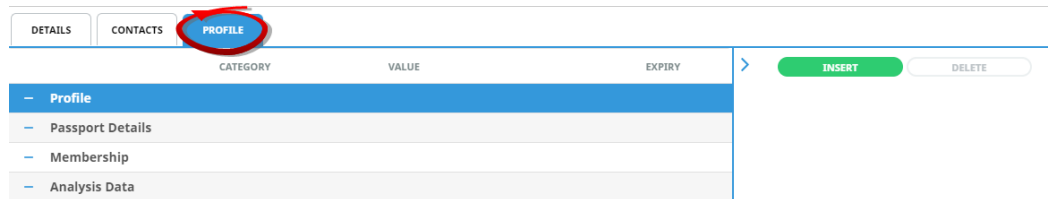
The web address for the contact (optional).

Recording Profile Information

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

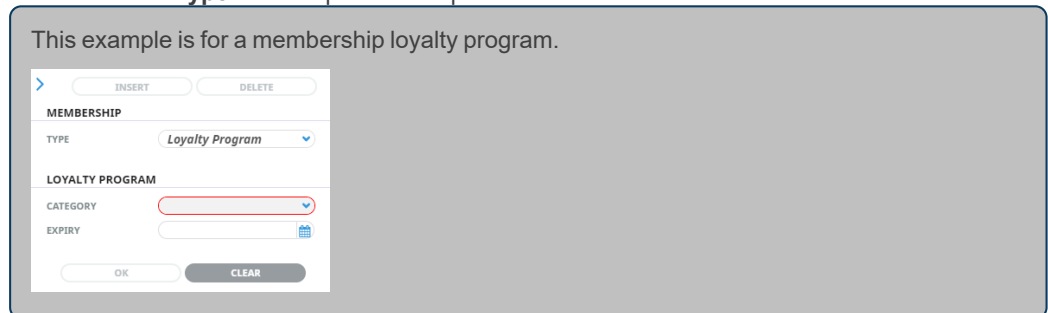
Adding Profile Information Per Passenger

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



The screenshot shows the Pax Details screen with three tabs: DETAILS, CONTACTS, and PROFILE. The PROFILE tab is selected and highlighted with a red circle. Below the tabs is a table with columns: CATEGORY, VALUE, and EXPIRY. The table has four rows: Profile, Passport Details, Membership, and Analysis Data. To the right of the table are two buttons: INSERT (green) and DELETE (grey).

2. Profile headings will show in a list to the left of the screen. Highlight the Profile tab and click **Insert**.
3. Select a Profile **Type** and complete the required fields.



The screenshot shows a modal window for adding profile information. It has a title bar with 'INSERT' and 'DELETE' buttons. Below the title bar is a section titled 'MEMBERSHIP' with a 'TYPE' dropdown menu set to 'Loyalty Program'. Below this is a section titled 'LOYALTY PROGRAM' with a 'CATEGORY' dropdown menu, an 'EXPIRY' date picker, and 'OK' and 'CLEAR' buttons at the bottom. A text box above the modal says 'This example is for a membership loyalty program.'

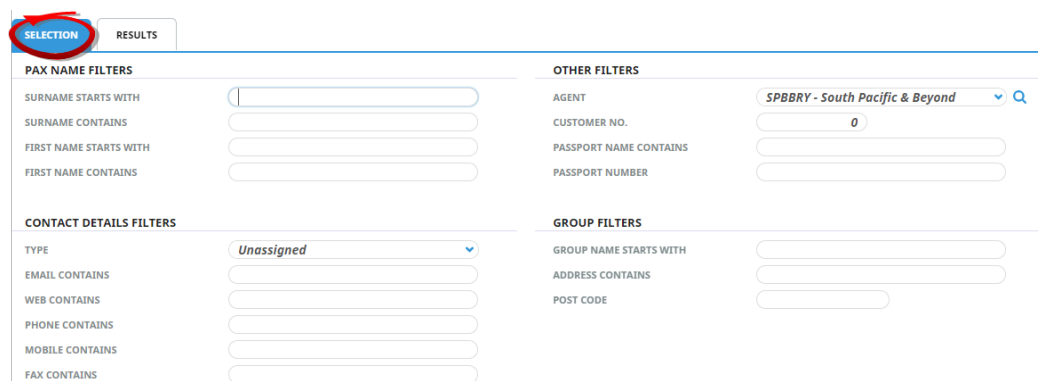
4. Click **OK** to keep the changes and save or update the entry.

Find Existing Pax

Format and type of data being stored will vary depending on the individual user company's requirements and setup.

Finding a Passenger Name from the CRM

1. From the Pax Details screen, click **Find Existing Pax**.
2. The **Pax Search** screen will open, select the required search filter fields in the **Selection Tab**.



The screenshot shows the Pax Search screen with two tabs: SELECTION and RESULTS. The SELECTION tab is selected and highlighted with a red circle. Below the tabs are three sections of filters: PAX NAME FILTERS, CONTACT DETAILS FILTERS, and OTHER FILTERS. Each section contains several input fields for searching. The PAX NAME FILTERS section has fields for SURNAME STARTS WITH, SURNAME CONTAINS, FIRST NAME STARTS WITH, and FIRST NAME CONTAINS. The CONTACT DETAILS FILTERS section has a TYPE dropdown menu set to 'Unassigned' and fields for EMAIL CONTAINS, WEB CONTAINS, PHONE CONTAINS, MOBILE CONTAINS, and FAX CONTAINS. The OTHER FILTERS section has fields for AGENT (set to 'SPBBRY - South Pacific & Beyond'), CUSTOMER NO. (set to '0'), PASSPORT NAME CONTAINS, and PASSPORT NUMBER. There is also a GROUP FILTERS section with fields for GROUP NAME STARTS WITH, ADDRESS CONTAINS, and POST CODE.

3. Click **Search**.
4. Or use the **Results Tab** to see searched results.
5. Examine the searched **Results** and click a name.
6. The Pax Names screen will re-appear, continue adding names, or select **Exit** to review the pax travelling list.

Add Services to an FIT Booking

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

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



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

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

1. [Transfer](#)
2. [Accommodation](#)
3. [Package](#)

Insert a Transfer Service

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

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

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

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

In this example, Country and Destination fields are being used and have been enabled for an additional search filter. User organisations may not have these fields enabled.

Service Line Insert EXIT

SELECTION RESULTS HELD (0)

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 / 10

SERVICE DATE 22-Apr-2025 Tuesday

QUANTITY 1

COUNTRY

DESTINATION

LOCATION AKL - Auckland

SUPPLIER

CODE

FIND PRODUCTS

NEW CONFIGURATION

Pax Group

Robson/Mr/Keith	Adult
Robson/Mrs/Mary-Ann	Adult

PRICE CODE

3. Click **Find Products**.

FIND PRODUCTS

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

SELECTION	RESULTS	HELD (0)					
BOOK	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	COST AVAILABLE
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	ABC Tours Ltd	Transfer Airport - City Ho...			73.92 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Hallmark Limousines Ltd	City Hotels to Airport & Ai...	Premium Vehicle		136.64 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Hallmark Limousines Ltd	Domestic Terminal to City...	Premium Vehicle		136.64 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Hallmark Limousines Ltd	International Terminal to ...	Foreign speaking driver, ...		422.24 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Hallmark Limousines Ltd	International Terminal to ...	Premium Vehicle		136.64 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Hallmark Limousines Ltd	International Airport to C...	Premium Vehicle		156.80 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Platinum Chauffeur Drive	Auckland Airport to City...	2010 BMW 730LD. or vv. ...		169.12 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Platinum Chauffeur Drive	City or Airport to Huka Lo...	2012 Audi A8LD. or vv. 1-...		1,762.88 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Platinum Chauffeur Drive	Auckland International to ...	2011 Merc Sprinter. or vv...		264.32 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Platinum Chauffeur Drive	Auckland 4 hours sightse...	2011 Merc Sprinter. 1-9 p...		988.96 RQ
<div>BOOK</div> <div>HOLD</div>	Auckland	Transfer	Supershuttle	Airport to Hotel Shuttle T...	Meet/greet Not Incl		73.92 RQ

NOTE:

- » Filter Selections can be used to refine a search. All of the Filter Selections fields can be attached to services in the Product Database so, if being used, they automatically display in this screen.
- » Clicking Hold will 'tag' and hold the product until it is formally booked. For example, multiple products for a particular location can be tagged as held and then all held products can be booked in one step.

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

Filter Selections

CLEAR EXIT OK

AGENT PRICE
AGENT AMOUNT FROM
AGENT AMOUNT TO

CLASS
☒ ALL
☒ UNASSIGNED

LOCALITY
☒ ALL
☒ UNASSIGNED

+ SERVICE CATEGORY
+ ANALYSIS 3
+ ANALYSIS 5

- PASS TYPE
- ANALYSIS 4
- ANALYSIS 6

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

SELECTION		RESULTS		HELD (1)				
RELEASE	DATE	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	AVAILABLE
RELEASE	22-Apr-2025	Auckland	Transfer	Hallmark Limousines Ltd	International Airport to C...	Premium Vehicle		RQ

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

Service Line Details

EXIT SAVE

PRODUCT SELECTED

AKL / TF / HMLA01 / INTHOT

Product Selected (Auckland,Transfer):
Hallmark Limousines Ltd, International Airport to City Hotel (Private Car),
Premium Vehicle

MESSAGES

Please enter pickup details

SERVICE INFORMATION

BOOKING DETAILS

DAY/SEQ.

110

IN DATE

22-Apr-2025 Tuesday 00:00

TRFR

1

SERVICE STATUS

(Default)

SUPPLIER CONF.

MAIN SERVICE PRICE: 156.80 NZD

SELECT PAX CONFIGURATION

PAX CONFIGURATION

2 Adults

VOUCHER PICKUP NEW CONFIGURATION

Pax Group

Robson/Mr/Keith Adult

Robson/Mrs/Mary-Ann Adult

NOTE:

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

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

- If there are pax configuration changes required, they can be made at this point via the **New Configuration** button.
- NEW CONFIGURATION
- If known, Pick Up and Drop Off details can be inserted for this service, click the **Pick Up** button to add times and remarks. Information can be inserted at a later date from the Itinerary Menu "Pickup / Dropoff" on page 93.
 - If used, Voucher Text can be inserted for this service. click the **Voucher** button to add Service or Rate Voucher Text.

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

SAVE

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

NOTE: You can now add another service (see ["Add Services to an FIT Booking" on page 35](#)) or manage other parts of the booking (see ["Managing Existing FIT Bookings" on page 53](#)).

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

About the Service Line Fields (Selection Tab)

All Service Types

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

Day/Seq.

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

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

Service Date

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

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

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

Quantity

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

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

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

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

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

NOTE:

- » **Accommodation** - the FCU is Room, and the SCU is Night, so the quantity is the number of Nights required.
- » **Non-accommodation** - e.g. for Rental Vehicles, the FCU is Car, the SCU is Day, so the quantity required is the number of days hire. The system knows (from the product setup) how many people the car can take and, if the number of people exceeds the available size, the system will automatically adjust the number of FCUs (Cars) to suit so, in this example, the quantity is **3**.

Country

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

Destination

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

Location

The location where the service takes place or originates.

Supplier

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

Code

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

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

Price Code (+ to expand)

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

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

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

The remaining selections are:

- » 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 agent and booking level price code selections for this service. If the price code is not available for any reason then the next available price code assigned in the agent hierarchy will be used.

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

New Configuration

This button allows a room configuration to be changed. Click the button, choose a new room configuration, and then use the circled + icons to assign pax to the new room.

Held Services

A list of held services will show in the **Held Tab**. This function allows users to hold multiple services and view more information pages for the services held.

About Service Line Insert - (Results Tab)

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

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

Filter Button

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

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

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

Book

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

Location Name

Full name of the location where the service is provided.

Service Name

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

Name

Full name of the service supplier.

Description

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

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

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

Setup Configuration During Service Insert

When entering the service that one room is *not* having, insert a new configuration by either:

- » Clicking the grey **New Configuration** button at the top of the Service Line Insert selection screen, or:
- » Once the service has been selected, click the green **New Configuration** button at the bottom of the Service Line Details screen.

Once into the New Pax Configuration screen, the new configuration must be set up with the names of the pax who *are* having the service.

NOTE: In both cases, existing configurations can be viewed.

Example 1: Service Line Insert - grey New Configuration

SELECTION RESULTS HELD (1)

ALL SERVICES

ACCOMMODATION DAY/SEQ. 1 / 30

SERVICE DATE 22-Apr-2025 Tuesday

QUANTITY 1

COUNTRY

DESTINATION

LOCATION AKL - Auckland

SUPPLIER

CODE

NEW CONFIGURATION

Double

Robson/Mr/Keith Adult

Robson/Mrs/Mary-Anne Adult

FIND PRODUCTS

+ PRICE CODE

Example 2: Service Line Details - Green New Configuration

This booking example has 6 pax travelling, initially only two of the group required accommodation. The service was entered with Mr & Mrs Kidd in a double room. The other passengers have since contacted to say they also require accommodation.

Service Line Details EXIT SAVE

PRODUCT SELECTED

AKL / AC / CLAA01 / ROH

Product Selected (Auckland, Accommodation): Citylife Auckland, Superior Room.

MESSAGES

Please enter pickup details

SERVICE INFORMATION

BOOKING DETAILS

DAY/SEQ. 1 / 30

IN DATE 18-Apr-2025 Friday 00:00

OUT DATE 19-Apr-2025 Saturday

NIGHT 1

SERVICE STATUS (Default)

SUPPLIER CONF.

EXTRAS

FULL BFAST 0 0.00

TDH DNR 0 0.00

CONT BFAST 0 0.00

MAIN SERVICE PRICE: 253.00 NZD

SELECT PAX CONFIGURATION

PAX CONFIGURATION 1 Double

DOUBLE

Kidd/Mr/Harry Adult

Kidd/Mrs/Irene Adult

VOUCHER PICKUP **NEW CONFIGURATION**



The configuration will default to the previously inserted service configuration, and new configuration selections maybe required.

Setup a Configuration During Service Insert

1. Retrieve an existing booking (see ["Retrieve an Existing Quote/Booking" on page 55](#)).
2. Switch to **Itinerary View**.
3. Click **Insert New Service**.

INSERT NEW SERVICE

4. Either:

- a. Click the grey **New Configuration** button, if the service is not yet inserted, or

NEW CONFIGURATION

- b. Click the green **New Configuration** button, if the service is already chosen.

NEW CONFIGURATION

5. On the **New Pax Configuration** screen, select the appropriate room configuration and assign pax accordingly.

ADD ROOM
NON ACCOMMODATION

SINGLE

TWIN

DOUBLE

TRIPLE

QUAD

OTHER

PAX GROUP

PAX NOT ASSIGNED		
Hall/Mr/Richard	Adult	+
Hall/Mrs/Lynn	Adult	+
Warner/Mr/Warren	Adult	+
Warner/Mrs/Susan	Adult	+

➡

ASSIGNED PAX/ROOM DETAILS		
<div style="display: flex; align-items: center;"> ⊖ Double ▾ </div>		
⊖	Kidd/Mr/Harry	Adult
⊖	Kidd/Mrs/Irene	Adult

The example shows a newly created 1 Double / 2 Pax configuration on the right (under **Assigned Pax/Room Details**), with the existing room configurations on the left (under **Pax Not Assigned** - meaning pax not assigned to the new configuration).

NOTE: When the new configuration is for an accommodation service, one of the room types Single, Twin, Double, Triple, Quad or Other must be used. If the configuration is for a non-accommodation service, then Pax Group must be used.

6. Click **OK** to return to the **Service Line Details** screen.

Service Line Details

EXIT

SAVE

PRODUCT SELECTED

AKL / AC / CRPA01 / ROH

Product Selected (Auckland, Accommodation):
Crowne Plaza Auckland, Superior Room.

SERVICE INFORMATION

BOOKING DETAILS

DAY/SEQ.

1

30

IN DATE

22-Apr-2025

Tuesday

00:00

OUT DATE

23-Apr-2025

Wednesday

NIGHT

1

SERVICE STATUS

(Default)

SUPPLIER CONF.

EXTRAS

FULL BFST

0

0.00

CONT BFST

0

0.00

2C DNR

0

81.00

MAIN SERVICE PRICE: 252.00 NZD

SELECT PAX CONFIGURATION

PAX CONFIGURATION

1 Double

VOUCHER

PICKUP

NEW CONFIGURATION

Double

Robson/Mr/Keith

Adult

Robson/Mrs/Mary-Ann

Adult

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

SAVE

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

Non-Accommodation Configurations

When Pax are entered at time of booking (single room or multi-room) and not all pax are having *all non-accommodation* services (e.g. some pax not having a transfer or sightseeing etc.), Tourplan will automatically save the non-accommodation service as a 'Pax Group'.

For example, if the sightseeing/transfer etc. service has been added using the 2 doubles/4 pax configuration, Tourplan will have automatically saved that as a 'Pax Group', so click on the Pax tab in the Service Details screen and remove the pax that are *not* having the service.

If the removal of the pax is more complex than that, a new Pax Group configuration will have to be created with the pax who *are* having the service placed in it.

Example: Pax removed from a non-accommodation service

DETAILS

COSTS

PAX

ALLOCATION

VOUCHER TEXT

PICKUP/DROPOFF

NOTES

QUEUE ENTRIES

ADD ROOM

NON ACCOMMODATION

SINGLE

TWIN

DOUBLE

TRIPLE

QUAD

OTHER

PAX GROUP

PAX NOT ASSIGNED

Kidd/Mr/Harry

Adult

+

ASSIGNED PAX/ROOM DETAILS

Pax Group

Hall/Mr/Richard

Adult

Hall/Mrs/Lynn

Adult

Kidd/Mrs/Irene

Adult

Warner/Mr/Warren

Adult

Warner/Mrs/Susan

Adult

About Room Configuration

Select the required room type(s) by using the + button.

**NOTE:**

- » The room type 'Other' must be used for any room type other than Single, Twin, Double, Triple or Quad. This includes Apartments, Dormitories etc.
- » If the Product Database has had Room Occupancy Policies completed, then the number of adults, children and infants entered into this screen is what the system uses to validate the policies. If the pax configuration in this screen does not meet the policy criteria from the Product Database, then the room type can not be used.
- » Costings for children can be different depending on the number of Adults and Children in the room and what the room type is. FITs will automatically determine the cost depending on this configuration. There are two types of child cost:
 - » **Child.** This where the child is free (or a nominal charge) if sharing the room with adults (and generally using existing bedding). Any charge for a child will have been entered in the Product Database as a 'Child Supplement'. 2 Adults and 1 Child in a Twin room would trigger this type of charge (hotel policy permitting).
 - » **Child Share.** This is where the child is technically occupying an adult space in the room, and the room cost is shared between the adult and the child. 1 Adult and 1 Child in a Twin room is an example of a Child Share.

Accommodation Services Insert

Insert an Accommodation Service

1. Services are added from the *Itinerary* menu:
 - a. Select menu **FITs > Itinerary** to show the itinerary for the Booking.
 - b. Click **Insert New Service**.

INSERT NEW SERVICE

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

2. From the **Service Insert** screen (Selection tab), select the appropriate accommodation service type from the All Service Types (e.g. *Accommodation*), in the Location drop-down field, select the relevant location (e.g. *AKL - Auckland*) and, in the Supplier drop-down field, select the supplier providing the accommodation (e.g. *CRPA01 - Crown Plaza Auckland*). You can also enter other search criteria to reduce the number of results returned.

Service Line Insert
EXIT

SELECTION
RESULTS
HELD (0)

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 / 20

SERVICE DATE 22-Apr-2025 Tuesday

QUANTITY 1

COUNTRY

DESTINATION

LOCATION AKL - Auckland

SUPPLIER CRPA01 - Crown Plaza Auckland

CODE

NEW CONFIGURATION

Pax Group

Robson/Mr/Kelth Adult

Robson/Mrs/Mary-Ann Adult

+ PRICE CODE

FIND PRODUCTS

NOTE: Fields and selections available on this screen are described fully in "About the Service Line Fields (Selection Tab)" on page 37.

3. Click **Find Products**.

FIND PRODUCTS

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

BOOK	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	COST AVAILABLE
BOOK	Auckland	Accommodation	Crowne Plaza Auckland	Superior Room		4	661.92 OK
HOLD							
BOOK	Auckland	Accommodation	Crowne Plaza Auckland	Superior Room		4	628.32 OK
HOLD							

NOTE:

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

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

SELECTION		RESULTS		HELD (1)				
RELEASE	DATE	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	AVAILABLE
RELEASE	22-Apr-2025	Auckland	Accommodation	Crowne Plaza Auckland	Superior Room		4	OK

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

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

Adjust the Day/Seq fields to show the correct values. In this example, they show **1** and **20**. Also check that the *In Date* and *Out Date* are correct.

Service Line Details

EXIT SAVE

PRODUCT SELECTED

AKL / AC / CRPA01 / ROH

Product Selected (Auckland, Accommodation):
Crowne Plaza Auckland, Superior Room.

SERVICE INFORMATION

BOOKING DETAILS

DAY/SEQ.

1 20

IN DATE

22-Apr-2025 Tuesday 00:00

OUT DATE

23-Apr-2025 Wednesday

NIGHT

1

SERVICE STATUS

(Default)

SUPPLIER CONF.

EXTRAS

FULL BFST

0 0.00

CONT BFST

0 0.00

2C DNR

0 81.00

MAIN SERVICE PRICE: 252.00 NZD

SELECT PAX CONFIGURATION

PAX CONFIGURATION

1 Double

VOUCHER PICKUP NEW CONFIGURATION

Double

Robson/Mr/Keith

Adult

Robson/Mrs/Mary-Ann

Adult

NOTE:

- » If you don't need to examine a product's details, or there are multiple Held products to book, you can stay on the Held tab and click *Book Held Services*.
- » Additional fields and selections available on this screen are described in "Add Services to an FIT Booking" on page 35.

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



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

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

NAME	Robson Mr & Mrs K	REFERENCE	USFI104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Quotation

All Pax								INSERT NEW SERVICE
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City Hot...	22-Apr-2025	1	IS	156.80	103,665
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	IS	266.00	103,675

NOTE: You can now add another service (see ["Add Services to an FIT Booking" on page 35](#)) or manage other parts of the booking (see ["Managing Existing FIT Bookings" on page 53](#)).

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

Package Insert

Insert a Package Service

- From the Service Insert screen (Selection tab), select *Package*, in the Location drop-down field, select the relevant location (e.g. *AKL - Auckland*) and in the Supplier drop-down field, select the supplier providing the package deal (e.g. *OOOC01 - Our Own Office Christchurch*):

Service Line Insert EXIT

SELECTION RESULTS HELD (0)

ALL SERVICES

ACCOMMODATION DAY/SEQ. 2 / 10

SERVICE DATE 23-Apr-2025 Wednesday

ACTIVITY QUANTITY 1

CANCELLATION FEE COUNTRY

CRUISE DESTINATION

ENTRANCE FEE LOCATION AKL - Auckland

FLIGHT SUPPLIER OOOC01 - Our Own Office - Christchurch

GUIDE CODE

ITINERARY TEXT

MEAL

PACKAGE

RENTAL VEHICLE

SIGHTSEEING/DAY TOUR

SUNDRY + PRICE CODE

SURCHARGE FEE

TRANSFER

TRANSPORT

NEW CONFIGURATION

Double

Robson/Mr/Keith Adult

Robson/Mrs/Mary-Ann Adult

FIND PRODUCTS

- Click **Find Products**.
- Products matching the service, location and supplier are returned in the Results tab. Find the service to add and click *Book* or *Hold* as required.
- For this example, click *Book* to show full details of the **package selected** (there is still one more opportunity to exit before the service is actually booked).

Service Line Details EXIT SAVE

PRODUCT SELECTED

AKL / PK / OOOC01 / 14SDR

Product Selected (Auckland, Package):
Our Own Office - Christchurch, 14 Day All NZ Self Drive,

SERVICE INFORMATION

BOOKING DETAILS

DAY/SEQ. 2 / 10

IN DATE 23-Apr-2025 Wednesday 00:00

TOUR 1

SERVICE STATUS (Default)

SUPPLIER CONF.

MAIN SERVICE PRICE: 8,694.00 NZD

SELECT PAX CONFIGURATION

PAX CONFIGURATION 1 Double

VOUCHER **PICKUP** **NEW CONFIGURATION**

Double

Robson/Mr/Keith Adult

Robson/Mrs/Mary-Ann Adult

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

SAVE

6. Click **Exit** to discard any changes.
7. Once **Save** is clicked, FITs returns to the Itinerary view of the booking, with the service line just entered shown in the list.



Since this is a package service, it may contain a number of package lines, which might be inserted into bookings in either an expanded or collapsed state. If the lines are expanded, a blue - (minus) icon appears to the left of the package line entry. To collapse the individual package lines and see only the package summary, click the - **icon**. Conversely, if the lines are shown collapsed, click the blue + **(plus) icon** to expand them.

	23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	8,694.00
---	--------	-----	-------------------------------	--------------------------	----------

NOTE: Copy in packages can have pick up/drop off and remark information copied from the package header to all services. Please speak with your local Tourplan Support office if you are interested in implementing this feature.

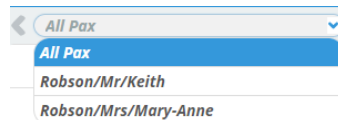
View Completed Quote

Itinerary View

The Itinerary view displays all the services for an existing quotation or booking. Scroll Bars enable navigation through these services if there is more than one page.

The following screenshot shows the Itinerary view of the new FIT Booking created in this chapter. Additional services can be added simply by clicking **Insert New Service**. Refer to "[About the Itinerary View Columns](#)" below for a description of each column in this view.

If there are multiple pax a dropdown selection is available to view the itinerary per room, or the arrow can be used.



Example: Completed FIT Booking - Itinerary View

CANCEL QUOTE
CONVERT QUOTE
EXIT

NAME:
REFERENCE:
TRAVEL DATE:

AGENT:
CONSULTANT:
STATUS:

< All Pax
▶
INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City Hot...	22-Apr-2025	1	IS	156.80	103,665
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	IS	266.00	103,675
1/30	AKL	Sky Tower	Access to Main Observations & S...	22-Apr-2025	1	IS	47.04	103,667

About the Itinerary View Columns

Day/Seq

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

Location

The location code for each service.

Supplier Name

The Supplier of each service.

Service Description

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

Date

The start date of each service.

Out/SCU

This column will display the end date of the service.

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

Status

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

Voucher No.

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

Agent

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

Dashboard View

At any time during the process of inserting services into the booking, a summary of the booking cost, selling price, markup, commission and tax can be viewed at the bottom of the Dashboard screen, which is accessed via menu **FITs > Dashboard**. Costs are organised into Booking Summary and Accounts Summary.

NOTE: The Dashboard view is the default view shown when existing bookings are searched for and retrieved. Existing Service Details can be viewed when clicking on a service, a redirection to the Itinerary Menu occurs when a service is selected from the Dashboard.

Example: Completed FIT Booking - Dashboard View

CANCEL QUOTE

CONVERT QUOTE

EXIT

NAME	Robson Mr & Mrs K		REFERENCE	USF1104568		TRAVEL DATE	22-Apr-2025	
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff		STATUS	Quotation	

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private Car)	156.80
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00
22 Apr	AKL	Sky Tower	Access to Main Observations & SkyDeck	47.04

BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)	
COST	424.48	MARKUP (10.69%)	45.36	INVOICES	0.00
RETAIL	469.84	COMMISSION (0.00%)	0.00	RECEIPTS	0.00
AGENT	469.84	TAX	61.28	TO BE INVOICED	469.84
AGENT (TAX INCLUSIVE)	469.84	MARGIN (9.65%)	45.36	TOTAL DUE	0.00

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

CHAPTER 3

Managing Existing FIT Bookings

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

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

In this chapter ...

An Example FIT Booking	54
Retrieve an Existing Quote/Booking	55
Converting a Quote to a Booking	59
Sell Accommodation Services from Allocation	61

An Example FIT Booking

As explained in ["Creating FIT Quotes" on page 21](#) of this user manual, the default view of an existing Booking is the Dashboard view, as shown in the example:

Completed FIT Booking - Dashboard View

NAME	Robson Mr & Mrs K	REFERENCE	USFI104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Confirmed

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944

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

What next?

The tasks involved in managing an existing FIT booking are organised into the following sections:

1. ["Retrieve an Existing Quote/Booking" on the facing page](#) - there are several ways to search for an existing booking, depending on the information you have about it.
2. ["Booking Details" on page 67](#) - changing basic booking details includes general setup info, pax travelling and room configurations, markup and/or commission info and booking or agent notes. You can also copy and recalculate a booking.
3. ["Itinerary Menu" on page 92](#) - changing the itinerary covers such things as pickup/dropoff details, voucher information, changing travel dates or times, adding service/product notes and managing PCM details.
4. ["Operations and Accounts" on page 123](#) - the accounting information section covers tasks to do with viewing the tour window, invoicing, reporting and documentation. It also covers checking the message queue and adding/updating contact details.
5. ["Creating Invoices" on page 127](#) - managing invoices is found under the Operations and Accounts View and covers creating three different types of invoice, including generating and emailing invoice documents.

Retrieve an Existing Quote/Booking

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

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

Recently Worked On		
BOOKINGS		
BOOKING NAME	BOOKING REF	LAST WORKED DATE
Robson Mr & Mrs K	USFI104678	08-Aug-2022 09:51
Whyte Mr & Mrs B	USFI104684	03-Aug-2022 14:30
Richardson Mr & Mrs A	USFI104685	03-Aug-2022 14:27
Shepard Mr & Mrs B	NZFI104680	03-Aug-2022 14:09
Dance NZ	NZGP104682	02-Aug-2022 10:07
Cycling NZ	NZGP104681	02-Aug-2022 09:39
Harness Racing Victoria NZ	NZGP104679	02-Aug-2022 08:44

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

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

The screenshot shows the FITs home page. At the top right, it says 'logged in as PA-NAOMIJOHNS'. Below this are two buttons: 'PRODUCT SEARCH' and 'INSERT NEW BOOKING'. In the center, there are two search fields: 'NAME' and 'REFERENCE', each with a search icon (magnifying glass) to its right.

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

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

The screenshot shows the 'Booking Search' screen. At the top right are buttons for 'CLEAR', 'EXIT', and 'SEARCH'. Below these are four tabs: 'BOOKING' (highlighted with a red circle), 'PAX/SERVICE', 'ANALYSIS', and 'RESULTS'. Under the 'BOOKING' tab, there are 'BOOKING FILTERS' including:

- NAME STARTS WITH (text input)
- NAME CONTAINS (text input)
- BOOKING REF FROM (text input)
- BOOKING REF TO (text input)
- CONSULTANT (dropdown menu)
- TRAVEL DATE FROM (date picker: 01-Jan-2023)
- TRAVEL DATE TO (date picker: 08-Aug-2025)
- DATE ENTERED FROM (date picker: 07-Nov-2023)
- DATE ENTERED TO (date picker: 08-Aug-2025)
- AGENT (dropdown menu)
- AGENT REFERENCE (text input)
- BOOKING CURRENCY (dropdown menu)
- CLIENT EMAIL (text input)
- USER DEFINED TEXT 2 (text input)
- USER DEFINED TEXT 3 (text input)
- USER DEFINED TEXT 4 (text input)
- USER DEFINED TEXT 5 (text input)

 At the bottom, there are three columns of selection options, each with a list of items and a 'SELECT' button:

- 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.

All three options are straightforward and intuitive.



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

Retrieve an Existing Booking

1. From the Home page, select menu **Home > Bookings and Quotes > FITs**.
2. Leaving both Name and Reference fields blank, click either of the **Search icons** to open the full Booking Search screen.



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

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

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

SEARCH

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

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

Booking Search CLEAR EXIT SEARCH

BOOKING	PAX/SERVICE	ANALYSIS	RESULTS
BOOKING	REFERENCE	TRAVEL DATE	ENTERED
Robson Mr & Mrs K	USF1104568	22-Apr-2025	24-Jan-2025
AGENT	CURRENCY	CONSULTANT	STATUS
SPBBRY	NZD	GRB	Confirmed

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

CANCEL QUOTE CONVERT QUOTE EXIT

NAME	Robson Mr & Mrs K	REFERENCE	USF1104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Quotation

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private Car)	156.80
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00
22 Apr	AKL	Sky Tower	Access to Main Observations & SkyDeck	47.04

BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)	
COST	424.48	MARKUP (10.69%)	45.36	INVOICES	0.00
RETAIL	469.84	COMMISSION (0.00%)	0.00	RECEIPTS	0.00
AGENT	469.84	TAX	61.28	TO BE INVOICED	469.84
AGENT (TAX INCLUSIVE)	469.84	MARGIN (9.65%)	45.36	TOTAL DUE	0.00

About the Booking Search Fields



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

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

Name Starts With

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

Booking Reference From/To

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

Consultant

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

Travel Date From/To

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

Date Entered From/To

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

Agent

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

Agent Reference

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

Booking Currency

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

User Defined Fields

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

Booking Status

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

NOTE:

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

Pax/Service Tab

Pax filters can be used to filter by Pax Filters, Service Filters or a specific Service confirmation number including:

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

Analysis Tab

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

Results Tab

The results tab can be used to view a list of results, or the search button can be selected. Users can select column titles and column widths unique to their requirements. Please see "[Appendix 1 - Scroll Column Headings](#)" on [page 158](#) to learn how to amend the column list.

Converting a Quote to a Booking



Some users may insert a booking with a confirmed booking status, if this is the case the booking would insert as a confirmed booking and this convert quote function would not feature for selection.

In Tourplan FIT Bookings and Quotes share the same structure and a lot of functionality. The Status is what determines whether it is treated as a Booking or Quote with Quote Statuses being any that are not permitted to hold allocation.

The procedure described below assumes that the booking was inserted as a quotation allowing users to enter booking information using a quote status, services can be quoted, agent documentation can be generated, the quotation can be added to and amended, or (if configured to do so) cancelled if it's no longer required.

The Convert Quote button offers an efficient way to convert the quotation into a booking by updating the booking status. If allocations are used, a selection to *Attempt to Take Allocation* will allow the booking to look for service allocations if the booking status selected is configured to use allocations. The quote to book feature uses the 'On Service Insert' status when the service is part of a quote to book operation or has a partial allocation.

Additionally if auto messaging is configured, a change of booking status can trigger auto messaging functions - Please speak to your local Tourplan Support Office if you are interested in this feature. If the quote contains external services then these will be validated and booked if available still.

Converting a Quote

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. From the dashboard or when any menu item is selected, there will be a **Convert Quote** button available on the header of the booking.

The screenshot shows a booking summary with the following details:

- NAME:** Robson Mr & Mrs K
- AGENT:** SPBBRY - South Pacific & Beyond
- REFERENCE:** USFI104568
- CONSULTANT:** Geoff
- TRAVEL DATE:** 22-Apr-2025
- STATUS:** Quotation

Buttons at the top right: CANCEL QUOTE, CONVERT QUOTE, EXIT.

Below the summary is a table of services:

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City Hot...	22-Apr-2025	1	IS	156.80	103,665
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	IS	266.00	103,675
1/30	AKL	Sky Tower	Access to Main Observations & S...	22-Apr-2025	1	IS	47.04	103,667

3. Click **Convert Quote**.



4. On the **Quote to Book** screen, select a **Booking Status** from the dropdown and select **Attempt To Take Allocation** if allocations are used.

The screenshot shows the 'Quote To Book' screen. The header 'Quote To Book' is circled in red. Below the header, there are fields for:

- NAME:** Robson Mr & Mrs K
- REFERENCE:** USFI104678
- BOOKING STATUS:** QU - Quotation

Buttons at the top right: PROCESS QUOTE TO BOOK, EXIT.

Below the summary is a table of services:

DAY/SEQ.	LOCATION	SUPPLIER	SERVICE	PRODUCT DESCRIPTION	ORIGINAL COST	COST	ORIGINAL RETAIL	RETAIL MESSAGE
1/10	AKL	HMLA01	TF	International Airport to City Hote...	156.80	156.80	156.80	156.80
1/20	AKL	CRPA01	AC	Superior Room	220.64	220.64	266.00	266.00
1/30	AKL	SKTA01	EF	Access to Main Observations & S...	47.04	47.04	47.04	47.04

5. Click **Process Quote To Book**.



6. A Summary of services will display, click **OK** to convert the quote to a booking.

Summary							OK	
DAY/SEQ.	LOCATION	SUPPLIER	SERVICE	PRODUCT DESCRIPTION	NEWSTATUS	MESSAGE		
1/10	AKL	HMLA01	TF	International Airport to City Hotel (Private Car)	IS			
1/20	AKL	CRPA01	AC	Superior Room	IS			
1/30	AKL	SKTA01	EF	Access to Main Observations & SkyDeck	IS			
SUCCESSFUL OPERATIONS			3		UNSUCCESSFUL OPERATIONS			0

7. Booking workflow from this task resumes as described in the remaining procedures.

About Convert Quote Fields

Booking Status

Booking statuses available in the dropdown list have been configured in **Code Setup > Bookings > Booking Status**. The booking status applied here will update in the booking header.

Attempt to Take Allocation

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

When the Booking Status is changed to one that does allow allocations, the system will test the existing services that a) have a Service Status that allows allocations and b) there are enough rooms in the allocation (s) for the service. If these conditions are met (and the agent is entitled to use allocation). If checked, the system will attempt to automatically take allocations for the services which have already been entered.

Sell Accommodation Services from Allocation

The allocation tab enables available allocations to be viewed prior to selecting the service. If an allocation is not available, then the system will provide buttons to search for services that do have allocations available. Allocation searches can be performed for the same supplier or the same location.



The System Setup and Code Setup requirements determine if allocations may be automatically taken during service insert. The setup required involves specific service status codes and in some instances specific message types attached to those service codes. Message types are used to indicate the workflow the system takes during the booking process. Having Tourplan automatically take allocations does enforce some quite specific rules regarding what can or can't be done with a service. We recommend discussing the options available with your local Tourplan Office.

The procedure that follows assumes that an automated 'take from allocation' is configured. Instruction on taking allocations manually is provided in the procedure ["Sell an Accommodation Service from Allocation" below](#)

Sell an Accommodation Service from Allocation

1. Services are added from the *Itinerary* menu:
 - a. Select menu **FITs > Itinerary** to show the itinerary for the Booking.
 - b. Click **Insert New Service**.

INSERT NEW SERVICE

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

2. From the **Service Insert** screen (Selection tab), select the appropriate accommodation service type from the All Service Types (e.g. *Accommodation*). In the Location drop-down field, select the relevant location (e.g. *AKL - Auckland*) and in the Supplier drop-down field, select the supplier providing the accommodation (e.g. *CRPA01 - Crowne Plaza Auckland*). You can also enter other search criteria to reduce the number of results returned.

Service Line Insert

EXIT

SELECTION

RESULTS

HELD (0)

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.

SERVICE DATE

QUANTITY

COUNTRY

DESTINATION

LOCATION

SUPPLIER

CODE

1 / 20

22-Apr-2025 Tuesday

1

AKL - Auckland

CRPA01 - Crowne Plaza Auckland

FIND PRODUCTS

NEW CONFIGURATION

Pax Group

Robson/Mr/Keith Adult

Robson/Mrs/Mary-Ann Adult

+ PRICE CODE

NOTE: Fields and selections available on this screen are described fully in [About the Service Line Insert Fields \(Selection tab\)](#).

3. Click **Find Products**.

FIND PRODUCTS

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

SELECTION	RESULTS	HELD (0)					
BOOK	LOCATION NAME	SERVICE NAME	SUPPLIER NAME	DESCRIPTION	COMMENT	CLASS	COST AVAILABLE
<div>BOOK</div> <div>HOLD</div>	Auckland	Accommodation	Crowne Plaza Auckland	Superior Room		4	661.92 OK
<div>BOOK</div> <div>HOLD</div>	Auckland	Accommodation	Crowne Plaza Auckland	Superior Room		4	628.32 OK

NOTE:

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

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

Adjust the Day/Seq fields to show the correct values. In this example, they show **1** and **20**. Also check that the *In Date* and *Out Date* are correct.

Service Line Details

EXIT SAVE

PRODUCT SELECTED

AKL / AC / CRPA01 / ROH

Product Selected (Auckland, Accommodation):
Crowne Plaza Auckland, Superior Room.

SERVICE INFORMATION

BOOKING DETAILS

DAY/SEQ.

1

20

IN DATE

22-Apr-2025

Tuesday

00:00

OUT DATE

23-Apr-2025

Wednesday

NIGHT

1

SERVICE STATUS

(Default)

SUPPLIER CONF.

MAIN SERVICE PRICE: 252.00 NZD

EXTRAS

FULL BFST

0

0.00

CONT BFST

0

0.00

2C DNR

0

81.00

SELECT PAX CONFIGURATION

VOUCHER PICKUP NEW CONFIGURATION

1 Double

Double

Robson/Mr/Keith

Adult

Robson/Mrs/Mary-Ann

Adult

NOTE:

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

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

SAVE

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

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

NAME	Robson Mr & Mrs K	REFERENCE	USFI104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Quotation

All Pax								INSERT NEW SERVICE
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City Hot...	22-Apr-2025	1	IS	156.80	103,665
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	IS	266.00	103,675

- Click on the service and select the **Allocation Tab**. The Allocation Used will display the number of rooms holding an allocation, and the Allocation Available heading shows the number of rooms available.

DETAILS

COSTS

PAX

ALLOCATION

VOUCHER TEXT

PICKUP/DROPOFF

NOTES

QUEUE ENTRIES

ALLOCATION AVAILABLE

SERVICE STATUS

KA - Conf from Allocation

AUTO ALLOCATION

SEARCH ALLOCATION

ALLOCATION	UNIT	SUB ALLOCATION	ALLOCATION TYPE	RELEASE	22/04
FIT Allocation	RM	GENERAL	Product Specific	985	6

- Select a **Service Status**.
- Click **Auto Allocation**, or click on the **Allocation Line** to take from allocation.
- Click **Save** to keep the changes.

SAVE

- The Allocation Tab now displays the number of used allocations for each used allocation date.

Allocation Tab Columns

The procedure above assumes that Tourplan has been configured to take the service from allocation on service insert. The system in this instance will be split into to categories Allocation Used and Allocation Available.

Allocation Used

Allocation

The allocation name.

Unit

The allocation unit / type e.g. Room or Seat etc.

Sub Allocation

The sub allocation is the (allocation split) name.

Type

The indicator for whether the allocation is either General or Specific to the service.

Release

The number of days from today's date to the Release Date of the allocation.

Date(s) - (of service)

The number of rooms available on this date.

Return Allocation Button

Allocations can be returned by clicking the Returned Allocations button. Once selected the system will display the Allocation Used date column with the number of rooms used-returned.

ALLOCATION	UNIT	SUB ALLOCATION	TYPE	RELEASE	26/11
ROH Allocation	RM	GENERAL	Specific	1	1 - 1

The Save button will then return the used allocation to the available allocation grid.

Allocation Available

The columns are replicated under the allocation available headings.

In this example you can see one allocation used for the 22/04 (the date of service). There are 5 rooms available for the FIT Allocation, and there is 86 days until the release period as this booking was made on the 24 Jan and the allocations had a 10 day release period.

Service Details

PREV

NEXT

CANCEL SERVICE

EXIT

SAVE

SUPERIOR ROOM

KK

1/20

22-Apr-2025

AKL / AC / CRPA01 / ROH

DETAILS

COSTS

PAX

ALLOCATION

VOUCHER TEXT

PICKUP/DROPOFF

NOTES

QUEUE ENTRIES

ALLOCATION USED

SERVICE STATUS

KK - Confirmed

RETURN ALLOCATION

ALLOCATION	UNIT	SUB ALLOCATION	ALLOCATION TYPE	RELEASE	22/04
FIT Allocation	RM	GENERAL	Product Specific	87	1

ALLOCATION AVAILABLE

AUTO ALLOCATION

SEARCH ALLOCATION

ALLOCATION	UNIT	SUB ALLOCATION	ALLOCATION TYPE	22/04
FIT Allocation	RM	GENERAL	Product Specific	5

Search Allocation

The button **Search Allocation** provides an additional product search used to view availability for alternative products.

Date From/To

Users can select the existing date range, or insert new availability dates allowing a broader availability search.

Search Mode

The additional search also offers users the option of searching for the same supplier or for the same location.

Supplier - will return availability results for all products linked to this supplier.

Location - will return availability results for all products with the same location.

Booking/Agent Allocations Only

A checkbox is pre-selected to ensure that the system searches for allocations available to the booking agent. Deselecting this check box will return results for 'all' allocations (not just the allocations assigned to the agent).

Search Availability

EXIT

SEARCH

FROM

22-Apr-2025

TO

22-Apr-2025

SEARCH MODE

THIS PRODUCT

THIS SUPPLIER

LOCATION

BOOKING/AGENT ALLOCATIONS ONLY

Once the field entries have been entered, check the screen and select **search**.

Auto Allocation

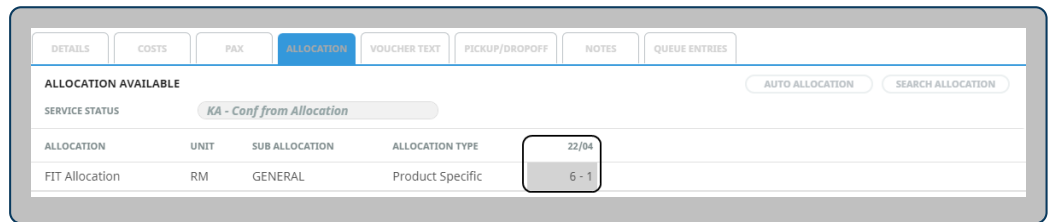
The Auto Allocation button allows the system to look to the booking details screen for the first date required and the product option selected, and to the costs screen for the quantity of nights. From here the system will automatically allocate the service if there is allocation availability.

Manually Take From Allocation

There are times when allocations will require manual selection to take from allocations. These instances are generally when Tourplan has not been configured to automatically take from allocations or if the allocation has been returned and manual selection of an alternative allocation is required.

Taking from Allocation Manually

1. Open the **Allocation Tab**.
2. Click on the **Date** cell (with the number of rooms available) for the allocation you wish to take from.
3. The cell will change to the number of rooms available on this date (6) and will show the number of rooms required for this booking (1).



The screenshot shows the 'Allocation Tab' interface. At the top, there are tabs: DETAILS, COSTS, PAX, ALLOCATION (selected), VOUCHER TEXT, PICKUP/DROPOFF, NOTES, and QUEUE ENTRIES. Below the tabs, there is a section titled 'ALLOCATION AVAILABLE' with a 'SERVICE STATUS' dropdown set to 'KA - Conf from Allocation'. To the right of this section are two buttons: 'AUTO ALLOCATION' and 'SEARCH ALLOCATION'. Below this is a table with the following columns: ALLOCATION, UNIT, SUB ALLOCATION, ALLOCATION TYPE, and a date/quantity cell. The table has one row: 'FIT Allocation', 'RM', 'GENERAL', 'Product Specific', and '22/04 6 - 1'. The '22/04' part of the date/quantity cell is highlighted with a red box.

ALLOCATION	UNIT	SUB ALLOCATION	ALLOCATION TYPE	22/04
FIT Allocation	RM	GENERAL	Product Specific	6 - 1

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



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CHAPTER 4

Booking Details

Booking Details menu selections allow information to be stored against the booking, booking header information can be amended and booking statuses can be maintained from within the General Setup screen. Pax Travelling allows maintenance of rooming configurations or passenger names.

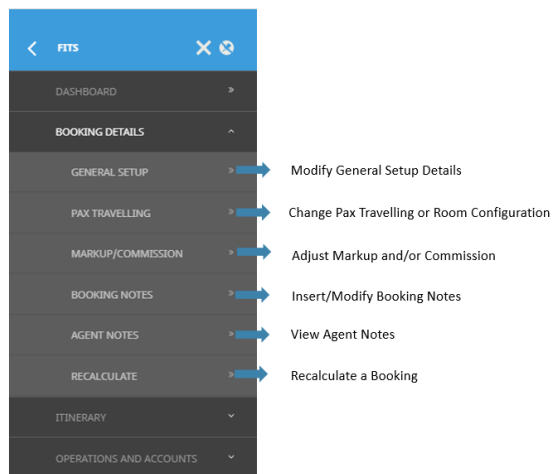
Other modifications can occur such as adjustment to the bookings markup/commission values, or recalculation of the booking can be preformed.

In this chapter ...

Booking Details Menu	68
General Setup	69
Pax Travelling	72
Adding a Passenger to an Existing Booking	76
Markup / Commission	79
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Agent Notes	86
Recalculate Booking	87
Copy Booking	88

Booking Details Menu

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



General Setup

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

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

The full list is:

1. "General Setup" above (this task)
2. "Pax Travelling" on page 72
3. "Markup / Commission" on page 79
4. "Booking Notes" on page 83
5. "Agent Notes" on page 86
6. "Recalculate Booking" on page 87

Modify General Setup Details

1. If you haven't already done so, search for and retrieve a Booking to work with (see ["Retrieve an Existing Quote/Booking" on page 55](#)).

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

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

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

NAME	Robson Mr & Mrs K	REFERENCE	USF104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Quotation

COPY QUOTE
DISCARD
SAVE

BOOKING	
NAME	Robson Mr & Mrs K
NAME ALIAS	
BOOKING STATUS	QU - Quotation
	<input type="checkbox"/> RELEASE ALLOCATION CURRENTLY HELD
PRICE CODE	Nett Rates
CONSULTANT	GRB - Geoff
TAX INDICATOR	6 - Markup proportionately taxed, pro
ALLOTMENT	
DATE ENTERED	24-Jan-2025
QUOTE VALIDITY	
USER DEFINED TEXT 2	
USER DEFINED TEXT 3	
USER DEFINED TEXT 4	
USER DEFINED TEXT 5	
DEPOSIT DUE	
DEPOSIT AMOUNT	0.00
FINAL PAYMENT DUE	
FINAL PAYMENT AMOUNT	0.00

ACCOUNTING	
BRANCH	US - USA Office
DEPARTMENT	FI - FIT
REFERENCE	104568
AGENT	SPBBRY - South Pacific & Beyond
CURRENCY	NZD - New Zealand Dollars
CURRENCY SUBCODE	Standard
CONTACT	
AGENT REFERENCE	

ANALYSIS	
BOOKING TYPE	Unassigned
PAX NATIONALITY	Unassigned
SOURCE	Unassigned
MARKUP M/A	Unassigned
DOC'S STATUS	Unassigned
REASON REFUSED	Unassigned

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

SAVE

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

DISCARD

About the Booking Details (General Setup) Fields

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

Header Section

Details in this section are dimmed-out (refer to ["About the Create Booking Fields" on page 24](#) for more information on the details entered).

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

Booking section*Name*

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

Name Alias

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

Booking Status

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

Attempt to Take Allocation

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

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

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

Price Code

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

Consultant

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

Tax Indicator

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

Allotment

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

Date Entered

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

User-Defined Text (fields) 1-5

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



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

Deposit Due

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

Deposit Amount

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

Final Payment Due

The amount of the deposit required

Final Payment Amount

The balance of the booking value that will be due on the Final Payment Due date

Accounting Section

Branch/Department/Reference

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

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

Agent

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

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

Currency

The defaulted Booking currency can be changed in this field if required (see ["About the Create Booking Fields" on page 24](#)).

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

(Currency) Subcode

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

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

Contact

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

Agent Reference

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

Analysis Section

Analysis Codes 1 – 6

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



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

Buttons

Copy Button - This button allows users to copy the booking, for more information on copying a booking see the topic called ["Copy Booking" on page 88](#).

Pax Travelling

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

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

The full list is:

1. ["General Setup" on page 69](#)
2. ["Pax Travelling" above](#) (this task)
3. ["Markup / Commission" on page 79](#)
4. ["Booking Notes" on page 83](#)
5. ["Agent Notes" on page 86](#)
6. ["Recalculate Booking" on page 87](#)

Booking Name vs Pax Names

A booking is referred to by its name; i.e. the Booking Name. As well as the Booking Name, Pax Travelling contains detail of the number and type of pax (adults, children and infants), plus the room configuration. This information is used by Tourplan to automatically cost the services when they are added to the booking.

Individual Pax names and age classifications can be included. Tourplan does not need pax names for costing, however, they can be included on documentation such as vouchers and invoices.

NOTE: Having different name levels means that different documentation can use names in a different format. For example, the Booking Name (e.g. Brown/Smith Party) could be used on messages to suppliers and the Pax Name(s) could be printed on Vouchers, Itineraries and Room Lists.

Room Configurations

Pax are allocated to a room record – a different record is required for each separate room in the booking. Room configurations must accurately reflect the type(s), quantity and configuration of room(s) being used in the booking. For example, if there are two couples (4 adults) in a booking and they want double rooms, then two double rooms must be inserted – the system will not allow four adults in a double room.

FITs also allows rooms to be merged or split on a service-by-service basis within the booking if required. For example, if two couples are in double rooms for the majority of the booking, but at one location sharing a two bedroom apartment, then in the Pax Travelling screen, set up the two double rooms and, during the inserting of the two bedroom apartment service, the two double rooms can be merged into one apartment. Similarly, if one of the couples does not want a particular service, that room can be removed from the service.

The example booking we have used in this procedure has 7 pax travelling. Mr and Mrs Hamilton are staying with friends, and the remainder of the group requires accommodation.

Change Pax Travelling or Room Configuration

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. The default view for a booking is the **Dashboard View**.

NAME	Henderson/Anderson Party		REFERENCE	NZFI104554	TRAVEL DATE	16-Nov-2025
AGENT	OVSTHO - Overseas Travel Ltd - H.O.		CONSULTANT	Lorna	STATUS	Invoiced

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
16 Nov	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private Car)	210.30
17 Nov	AKL	Budget Rent A Car	Group A - Sub Compact Manual	799.38
18 Nov	AKL	Great Sights New Zealand	Auckland Morning City Sights + Kelly Tarltons	843.66
21 Nov	MAT	Hobbiton Movie Set & Farm Tours	Movie Set & Farm Tour	511.60
21 Nov	ROT	Millennium Rotorua Hotel	Superior Room	425.52
23 Nov	ROT	Agrodome Leisure Park	Sheep Show	76.25
23 Nov	ROT	Polynesian Spa	Adult Pools & Priest Spa	177.09

BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)	
COST	2,772.00	MARKUP (22.01%)	610.00	INVOICES	3,317.84
RETAIL	3,382.00	COMMISSION (10.00%)	338.20	RECEIPTS	1,479.40
AGENT	3,043.80	TAX	397.02	TO BE INVOICED	0.00
AGENT (TAX INCLUSIVE)	3,043.80	MARGIN (8.93%)	271.80	TOTAL DUE	1,838.44

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

- Examine the **pax details** on the Pax tab and change any as required by clicking a pax line to open the Pax Details screen for that line. You can also use the **Insert** button to add further pax to this booking.

We have inserted Mr & Mrs Hamilton to the Pax Table.

NOTE: Once in the Pax Details screen, you can update any field on the screen. You can also add contact details via another **Insert** button in the Contacts section.

PAX						ROOM CONFIGURATION	INSERT
SURNAME	TITLE	FIRST NAME	PAX TYPE	DATE OF BIRTH	AGE		
Anderson	Mrs	Allison	Adult		0		
Anderson	Mr	Harry	Adult		0		
Anderson	Master	Terry	Child	19-May-2011	14		
Hamilton	Ms	Terri	Adult		0		
Hamilton	Mr	Tom	Adult		0		
Henderson	Mr	Alan	Adult		0		
Henderson	Mrs	Alice	Adult		0		

- Examine the **room details** on the Room Configuration tab and change any as required by clicking the relevant room line to open the Booking Room Update screen.

We have added Mr & Mrs Hamilton to all non accommodation services, although they did not want to go to the Sheep Show.

PAX		ROOM CONFIGURATION					
DESCRIPTION	ROOM	PAX	DAY/SEQ.	DATE	LOCATION	SUPPLIER NAME	PRODUCT
2 Adults, 1 Child		Anderson/Mrs/Alison	8/10	23-Nov-2025	ROT	Agrodome Leisure Park	Sheep Show
		Anderson/Mr/Harry					
		Anderson/Master/Terry					
2 Doubles	Double	Anderson/Mrs/Alison	6/10	21-Nov-2025	ROT	Millennium Rotorua Hotel	Superior Room
		Anderson/Mr/Harry					
		Anderson/Master/Terry					
	Double	Henderson/Mr/Alan					
		Henderson/Mrs/Alice					
6 Adults, 1 Child		Anderson/Mrs/Alison	1/5	16-Nov-2025	AKL	Hallmark Limousines Ltd	International Airport to City H...
		Anderson/Mr/Harry	2/20	17-Nov-2025	AKL	Budget Rent A Car	Group A - Sub Compact Manual
		Anderson/Master/Terry	3/20	18-Nov-2025	AKL	Great Sights New Zealand	Auckland Morning City Sights ...
		Hamilton/Ms/Terri	6/5	21-Nov-2025	MAT	Hobbiton Movie Set & Farm T...	Movie Set & Farm Tour
		Hamilton/Mr/Tom	8/20	23-Nov-2025	ROT	Polynesian Spa	Adult Pools & Priest Spa
		Henderson/Mr/Alan					
		Henderson/Mrs/Alice					

Booking Room Update Line 2 (Double Room - 2 Adults, 1 Child and Double Room - 2 Adults)

Booking Room Update

EXIT

SAVE

ADD ROOM

SINGLE

TWIN

DOUBLE

TRIPLE

QUAD

OTHER

PAX GROUP

NON ACCOMMODATION

PAX NOT ASSIGNED

Hamilton/Mr/Tom	Adult	
Hamilton/Ms/Terri	Adult	

ASSIGNED PAX/ROOM DETAILS

Double

Anderson/Mr/Harry

Adult

Anderson/Mrs/Alison

Adult

Anderson/Master/Terry

Child

Double

Henderson/Mr/Alan

Adult

Henderson/Mrs/Alice

Adult

NOTE: Refer also to "Set Room Configurations" on page 27 for more information on adding or changing room configurations.

For Booking Room Update changes:

» Click **Save** to keep the changes.

SAVE

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

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

SAVE

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

DISCARD

About the Pax Travelling and Room Configuration Fields

Pax Details Tab

Pax Name

If individual Pax names need to be listed on various Tourplan-generated documents such as vouchers, then enter the names of each passenger within this room, including Title (e.g. Mr.), First Name or Forename (e.g. Fred) and Surname (e.g. Smith), plus select Adult, Child or Infant.

Lead Pax

This checkbox becomes active once a pax name is added. The Lead Pax passenger can be designated as the communication contact person for the booking.

Title Alias, First Name Alias, Surname Alias allow passenger name variations typically used to save alternative language text for a passengers name.

Pax Type

This drop-down selection is used to assign a type to the individual pax names being entered. The default is Adult.

NOTE:

- » 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 v the date of the 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 2029. If a DOB is entered which is prior to 1939, it is calculated as 100 years later; e.g. 1937 is calculated as 2037.
- » It is the 'Date of Birth' field which is used to calculate whether children qualify for child rates, not the Age field. An Age can be entered into the Age field, and the Date of Birth field will be calculated, based on the Travel Date being a birthday.

Once in the relevant update screen (i.e. **Pax Details** or **Booking Room Update**).

For more information about loading pax information please see ["Enter Pax Details" on page 29](#).

Adding a Passenger to an Existing Booking

When this scenario arises, the original configuration(s) can be changed to accommodate the new passengers.

Add New Pax to a Completed Booking

The following steps need to be taken:

1. ["Retrieve an Existing Quote/Booking" on page 55.](#)
2. From the FITs menu (with the booking open), select **FITs > Booking Details > Pax Travelling.**
3. On the **Pax tab**, click the **Insert** button and add the new names.

PAX ROOM CONFIGURATION					
SURNAME	TITLE	FIRST NAME	PAX TYPE	DATE OF BIRTH	AGE
Barclay	Mrs	Anne	Adult		0
Barclay	Mr	Ross	Adult		0
Robertson	Mr	Morrie	Adult		0
Robertson	Mrs	Ruth	Adult		0

NOTE: An insert and save is required for each name being added.

4. When all **additional pax** have been added, click the Room Configuration tab.

PAX ROOM CONFIGURATION					
SURNAME	TITLE	FIRST NAME	PAX TYPE	DATE OF BIRTH	AGE
Barclay	Mrs	Anne	Adult		0
Barclay	Mr	Ross	Adult		0
Matthews	Mrs	Adle	Adult		0
Matthews	Mr	Morrie	Adult		0
Robertson	Mr	Morrie	Adult		0
Robertson	Mrs	Ruth	Adult		0

5. Two **room configurations** show – one with three adults (a non-accommodation transfer) and the other for two doubles for all other services. Click anywhere in the area of the configurations (individually) and the configuration will open, allowing the additional names to be assigned to the Pax or Rooms.

PAX ROOM CONFIGURATION							
DESCRIPTION	ROOM	PAX	DAY/SEQ.	DATE	LOCATION	SUPPLIER NAME	PRODUCT
2 Doubles	Double	Barclay/Mrs/Anne	1/20	22-Apr-2025	CHC	Commodore Airport Hotel	Superior Room
		Barclay/Mr/Ross	2/10	23-Apr-2025	CHC	Budget Rent A Car	Group F - Full Size Wagon - St...
	Double	Robertson/Mr/Morrie	2/20	23-Apr-2025	CHC	International Antarctic Centre	Xtreme Pass + 4D - Entry, Pen...
		Robertson/Mrs/Ruth	3/10	24-Apr-2025	TPO	Peppers Bluewater Resort	Deluxe Lake View Hotel Room
			4/10	25-Apr-2025	TPO	Earth and Sky Lake Tekapo	Earth to Sky Scenic Day Tour i...
			4/20	25-Apr-2025	ZQN	Shotover Jet Queenstown	Jetboat Ride
			4/30	25-Apr-2025	ZQN	Copthorne Lakefront Hotel	Superior Room
			5/10	26-Apr-2025	ZQN	Real Journeys	RJ102 0655 Milford Sound Coa...
3 Adults		Barclay/Mrs/Anne	1/10	22-Apr-2025	CHC	Supershuttle	Airport to Hotel Shuttle Transf...
		Robertson/Mr/Morrie					
		Robertson/Mrs/Ruth					

Example 1: Assign additional pax to the Pax Group

Booking Room Update

+

SINGLE

+

TWIN

+

DOUBLE

+

TRIPLE

+

QUAD

+

OTHER

+

PAX GROUP

+

Matthwews/Mr/Morrie

Adult

+

+

Matthwews/Mrs/Adie

Adult

+

ASSIGNED PAX/ROOM DETAILS

⊖ Pax Group

⊖ Barclay/Mr/Ross Adult

⊖ Barclay/Mrs/Anne Adult

⊖ Robertson/Mr/Morrie Adult

⊖ Robertson/Mrs/Ruth Adult

Example 2: Assign additional pax to a Room Type

+

SINGLE

+

TWIN

+

DOUBLE

+

TRIPLE

+

QUAD

+

OTHER

+

PAX GROUP

+

Matthwews/Mr/Morrie

Adult

+

+

Matthwews/Mrs/Adie

Adult

+

ASSIGNED PAX/ROOM DETAILS

⊖ Double

⊖ Barclay/Mr/Ross Adult

⊖ Barclay/Mrs/Anne Adult

⊖ Double

⊖ Robertson/Mr/Morrie Adult

⊖ Robertson/Mrs/Ruth Adult

⊖ Double

Example 3: 5 pax are assigned to the arrival Shuttle Transfer and all pax are now assigned to the remaining services.

PAX	ROOM CONFIGURATION
3 Doubles	<div> <div>Double</div> <div>Barclay/Mrs/Anne</div> <div>1/20</div> <div>22-Apr-2025</div> <div>CHC</div> <div>Commodore Airport Hotel</div> <div>Superior Room</div> </div> <div> <div>Double</div> <div>Barclay/Mr/Ross</div> <div>2/10</div> <div>23-Apr-2025</div> <div>CHC</div> <div>Budget Rent A Car</div> <div>Group F - Full Size Wagon - St...</div> </div> <div> <div>Double</div> <div>Matthwews/Mrs/Adie</div> <div>2/20</div> <div>23-Apr-2025</div> <div>CHC</div> <div>International Antarctic Centre</div> <div>Xtreme Pass + 4D - Entry, Pen...</div> </div> <div> <div>Double</div> <div>Matthwews/Mr/Morrie</div> <div>3/10</div> <div>24-Apr-2025</div> <div>TPO</div> <div>Peppers Bluewater Resort</div> <div>Deluxe Lake View Hotel Room</div> </div> <div> <div>Double</div> <div>Robertson/Mr/Morrie</div> <div>4/10</div> <div>25-Apr-2025</div> <div>TPO</div> <div>Earth and Sky Lake Tekapo</div> <div>Earth to Sky Scenic Day Tour I...</div> </div> <div> <div>Double</div> <div>Robertson/Mrs/Ruth</div> <div>4/20</div> <div>25-Apr-2025</div> <div>ZQN</div> <div>Shotover Jet Queenstown</div> <div>Jetboat Ride</div> </div> <div> <div>Double</div> <div>Robertson/Mrs/Ruth</div> <div>4/30</div> <div>25-Apr-2025</div> <div>ZQN</div> <div>Copthorne Lakefront Hotel</div> <div>Superior Room</div> </div> <div> <div>Double</div> <div>Robertson/Mrs/Ruth</div> <div>5/10</div> <div>26-Apr-2025</div> <div>ZQN</div> <div>Real Journeys</div> <div>RJ102 0655 Milford Sound Coa...</div> </div>
5 Adults	<div> <div>Barclay/Mrs/Anne</div> <div>1/10</div> <div>22-Apr-2025</div> <div>CHC</div> <div>Supershuttle</div> <div>Airport to Hotel Shuttle Transf...</div> </div> <div> <div>Matthwews/Mrs/Adie</div> </div> <div> <div>Matthwews/Mr/Morrie</div> </div> <div> <div>Robertson/Mr/Morrie</div> </div> <div> <div>Robertson/Mrs/Ruth</div> </div>

- If the additional pax are not to be added to all services, then once the names have been added under the Pax Tab, from the FITs menu (with the Booking loaded), select **Itinerary** and click on the service(s) that the additional pax are to be added to. When the Service Details screen opens, click the **Pax** tab and move the Pax to the Pax Group or Room as required.
- Click **Save** to keep the changes.

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

About Room Configuration

Select the required room type(s) by using the + button.



NOTE:

- » The room type 'Other' must be used for any room type other than Single, Twin, Double, Triple or Quad. This includes Apartments, Dormitories etc.
- » If the Product Database has had Room Occupancy Policies completed, then the number of adults, children and infants entered into this screen is what the system uses to validate the policies. If the pax configuration in this screen does not meet the policy criteria from the Product Database, then the room type can not be used.
- » Costings for children can be different depending on the number of Adults and Children in the room and what the room type is. FITs will automatically determine the cost depending on this configuration. There are two types of child cost:
 - » **Child.** This where the child is free (or a nominal charge) if sharing the room with adults (and generally using existing bedding). Any charge for a child will have been entered in the Product Database as a 'Child Supplement'. 2 Adults and 1 Child in a Twin room would trigger this type of charge (hotel policy permitting).
 - » **Child Share.** This is where the child is technically occupying an adult space in the room, and the room cost is shared between the adult and the child. 1 Adult and 1 Child in a Twin room is an example of a Child Share.

Markup / Commission

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

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

The full list is:

1. ["General Setup" on page 69](#)
2. ["Pax Travelling" on page 72](#)
3. ["Markup / Commission" above](#) (this task)
4. ["Booking Notes" on page 83](#)
5. ["Agent Notes" on page 86](#)
6. ["Recalculate Booking" on page 87](#)

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

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

NOTE:

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

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

Adjust Markup and/or Commission

1. If you haven't already done so, search for and retrieve a Booking to work with (see ["Retrieve an Existing Quote/Booking" on page 55](#)).
2. The default view for a Booking is the **Dashboard View**.

CANCEL QUOTE

CONVERT QUOTE

EXIT

NAME


Robson Mr & Mrs K

REFERENCE

USFI104568

TRAVEL DATE

22-Apr-2025



AGENT

SPBBRY - South Pacific & Beyond

CONSULTANT

Geoff

STATUS

Quotation

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private Car)	156.80
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00
22 Apr	AKL	Sky Tower	Access to Main Observations & SkyDeck	47.04

BOOKING SUMMARY (NZD)

COST

424.48

MARKUP (10.69%)

45.36

RETAIL

469.84

COMMISSION (0.00%)

0.00

AGENT

469.84

TAX

61.28

AGENT (TAX INCLUSIVE)

469.84

MARGIN (9.65%)

45.36

ACCOUNTS SUMMARY (NZD)

INVOICES

0.00

RECEIPTS

0.00

TO BE INVOICED

469.84

TOTAL DUE

0.00

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

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

NAME	Robson Mr & Mrs K	REFERENCE	USF1104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Quotation

DATE	LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %	AGENT
22-Apr-2025	AKL	International Airport to City Hote...	156.80	0.00	0.00%	156.80	0.00	0.00%	156.80
22-Apr-2025	AKL	Superior Room	220.64	45.36	20.56%	266.00	0.00	0.00%	266.00
22-Apr-2025	AKL	Access to Main Observations & S...	47.04	0.00	0.00%	47.04	0.00	0.00%	47.04
Booking Total			424.48	45.36	10.69%	469.84	0.00	0.00%	469.84

Markup/Commission for *Superior Room* (line 2 in the example)

Markup/Commission

PREV

NEXT

EXIT

SAVE

SUPERIOR ROOM

IS

1/20

22-Apr-2025

AKL / AC / CRPA01 / ROH

COST	220.64				
MARKUP	45.36	COMMISSION	0.00	MARGIN	45.36
MARKUP %	20.56	COMMISSION %	0.00	MARGIN%	17.05
RETAIL	266.00	AGENT	266.00		

- Apply the markup and/or commission required, either as values or percentages. In other words, you can enter both a markup and a commission on this screen, but enter each as *either* a dollar value or a percentage.
- Click **Save** to keep the changes.
- Click **Exit** to discard any changes.
- Once you have finished (and *after* clicking Save), click **Exit** to close the Markup/Commission screen.

About the Markup/Commission Fields

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

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

Rounding

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

APPLY ROUNDING

EXIT

SAVE

Apply Rounding

SERVICE LINE RETAIL ROUNDING

☒ NONE

☐ 0.1

☐ 0.5

☐ 1

☐ 5

☐ 10

SERVICE LINE AGENT ROUNDING

☒ NONE

☐ 0.1

☐ 0.5

☐ 1

☐ 5

☐ 10

Apply to all Room Types

When checked the system will apply rounding to all room types.

Service Line Retail Rounding

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

Service Line Agent Rounding

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

Column Headings and Descriptions

The example below, has a full itinerary including a package inserted into the booking.

			1	2	3	4	5	6	7
									APPLY ROUNDING
DATE	LOCATION	PRODUCT DESCRIPTION	COST	MARKUP	MARKUP %	RETAIL	COMM	COMM %	AGENT
22-Apr-2025	AKL	International Airport to City Hot...	156.80	0.00	0.00%	156.80	0.00	0.00%	156.80
22-Apr-2025	AKL	Superior Room	220.64	45.36	20.56%	266.00	0.00	0.00%	266.00
23-Apr-2025	AKL	14 Day All NZ Self Drive							
23-Apr-2025	AKL	Airport to Hotel Shuttle Transfer	73.92	16.04	21.70%	89.96	0.00	0.00%	89.96
23-Apr-2025	AKL	Deluxe Harbourview Room (Lev...	609.28	132.21	21.70%	741.49	0.00	0.00%	741.49
24-Apr-2025	AKL	Auckland Harbour Cruise	82.88	17.98	21.69%	100.86	0.00	0.00%	100.86
24-Apr-2025	AKL	Group D - Intermediate Automat...	1,740.48	377.68	21.70%	2,118.16	0.00	0.00%	2,118.16
25-Apr-2025	WCC	Waitomo & Ruakuri Cave Combo	179.20	38.89	21.70%	218.09	0.00	0.00%	218.09
25-Apr-2025	ROT	Superior Room Lake View	508.48	110.34	21.70%	618.82	0.00	0.00%	618.82
26-Apr-2025	ROT	Guided Tour (90minutes)	64.96	14.10	21.71%	79.06	0.00	0.00%	79.06
26-Apr-2025	ROT	Admission To Museum	38.08	0.00	0.00%	38.08	0.00	0.00%	38.08
26-Apr-2025	ROT	Adult Pools & Priest Spa	53.76	0.00	0.00%	53.76	0.00	0.00%	53.76
26-Apr-2025	ROT	Tamaki Maori Village - Hangi & C...	224.00	48.61	21.70%	272.61	0.00	0.00%	272.61
27-Apr-2025	WHP	Executive Spa Suite	1,041.60	226.03	21.70%	1,267.63	0.00	0.00%	1,267.63
28-Apr-2025	NAT	1 day Guided Tongariro Crossing	456.96	99.16	21.70%	556.12	0.00	0.00%	556.12
29-Apr-2025	WLG	Deluxe Room	588.00	127.59	21.70%	715.59	0.00	0.00%	715.59
30-Apr-2025	WLG	Wellington/Picton Ferry - Premi...	230.72	50.07	21.70%	280.79	0.00	0.00%	280.79
30-Apr-2025	NSN	Standard Room	185.00	40.14	21.70%	225.14	0.00	0.00%	225.14
01-May-2025	GMN	Run of House Room	146.72	31.84	21.70%	178.56	0.00	0.00%	178.56
02-May-2025	FGL	Fox Trot, Half Day Guided Glacie...	248.64	53.95	21.70%	302.59	0.00	0.00%	302.59
02-May-2025	FGL	Run of House includes Full Brea...	331.52	71.94	21.70%	403.46	0.00	0.00%	403.46
03-May-2025	ZQN	One Bedroom Alpine Lakeview S...	1,317.12	285.81	21.70%	1,602.93	0.00	0.00%	1,602.93
04-May-2025	ZQN	G5500L Discover Milford Sound ...	1,364.16	296.02	21.70%	1,660.18	0.00	0.00%	1,660.18
05-May-2025	CHC	Superior Room	249.76	54.20	21.70%	303.96	0.00	0.00%	303.96
Booking Total			10,020.84	2,137.96	21.34%	12,158.80	0.00	0.00%	12,158.80

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

Column Number	Explanation
6	Comm % An on-screen calculation (i.e. not stored in the system) of the commission value expressed as a percentage of the retail total.
7	Agent The sum of retail less commission = the price the agent debtor will pay.

Booking Notes

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

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

The full list is:

1. "General Setup" on page 69
2. "Pax Travelling" on page 72
3. "Markup / Commission" on page 79
4. "Booking Notes" above (this task)
5. "Agent Notes" on page 86
6. "Recalculate Booking" on page 87

There are Booking Notes and Agent Notes:

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

Insert a Booking Note

1. If you haven't already done so, search for and retrieve a Booking to work with (see "[Retrieve an Existing Quote/Booking](#)" on page 55).
2. The default view for a Booking is the **Dashboard View**.
3. To examine and work with Booking Notes, from the FITs menu, select **FITs > Booking Details > Booking Notes**.
4. From the list of **Booking Notes** returned, click any existing note to open it. To add a note, click *Insert*.

						INSERT
+	CAT	DESCRIPTION	CREATED	CREATED BY	UPDATED	UPDATED BY
	BDA	Agent Dialogue	11-Aug-2024 11:50:40	PA-NAOMIJOHNS	11-Aug-2022 11:50:40	PA-NAOMIJOHNS

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

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

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



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













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

About Booking Notes Formatting Fields

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

The Editing screen has the following items:

Format type	Format Option Descriptions
Format	Format of the paragraph text. Normal, Headings 1,2,3,4,5, & 6, Formatted, Address,
Font	Font of text (will default from the INI Setting DEFAULTFONT)
Size	Font Size of text (will default from the INI Setting DEFAULTEDITFONTSIZE)
	Style, Font and Font Size. The available styles and fonts are the Windows styles and fonts installed on the computer running Tourplan
B	Bold - highlight the text to be bold faced and click this button
<i>I</i>	Italics - highlight the text to be italic and click this button
<u>U</u>	Underline - highlight the text to be underlined and click this button
A	Colour of text – highlight the text to change the colour and click this button
1= 2=	Numbered bullet points - click this button to create a numbered list
•= •=	Bullet points - click this button to create a bulleted list

Format type	Format Option Descriptions
	Left aligned text - click this button to justify text on the left margin
	Centre aligned text - click this button to centre text between the left and right margins
	Right aligned text - click this button to justify text on the right margin
	Left and Right justified text. Click this button to justify text between the left & right margins
	<p>Insert a URL link – click this button to insert the text you want showing as a hyperlink and insert the required URL</p> <div data-bbox="454 584 1235 741"> <p>Link EXIT ADD</p> <p>TEXT <input type="text"/></p> <p>URL <input type="text" value="http://"/></p> </div>
	<p>Upload an image – click this button to upload an image</p> <div data-bbox="454 804 1235 994"> <p>Image EXIT ADD</p> <p> UPLOAD UPLOAD  WIDTH <input type="text" value="600"/> PIXELS </p> <p>PREVIEW</p> </div>
	Insert a table – click this button to insert a table
	Cut text (Ctrl+X) highlight text to be cut and click this button
	Copy text (Ctrl+C) highlight text to be copied and click this button
	Paste text (Ctrl+V) place the cursor at the point where copied/cut text is to be placed and click this button
 Source	Selecting this button will show the text editor in CSS styling source code

Agent Notes

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

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

The full list is:

1. ["General Setup" on page 69](#)
2. ["Pax Travelling" on page 72](#)
3. ["Markup / Commission" on page 79](#)
4. ["Booking Notes" on page 83](#)
5. ["Agent Notes" above](#) (this task)
6. ["Recalculate Booking" on the facing page](#)

There are Booking Notes and Agent Notes:

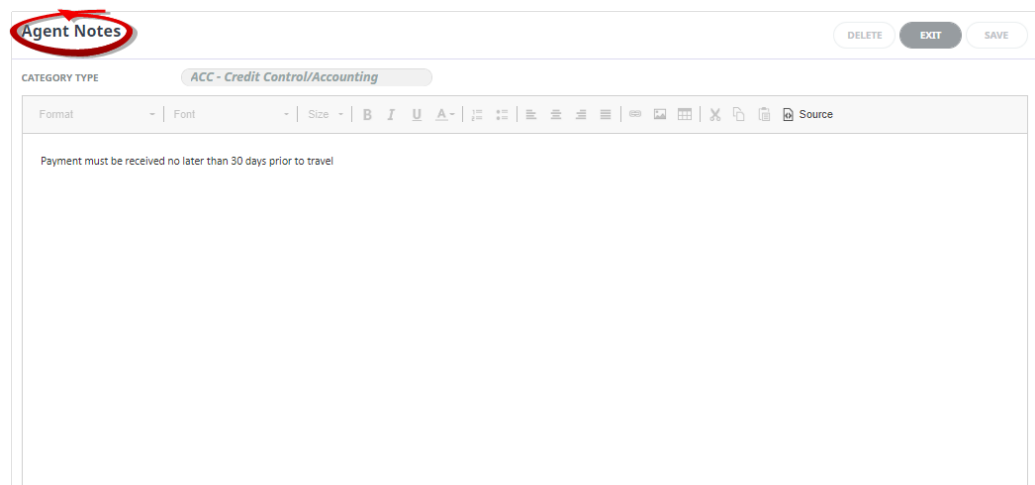
- » **Booking Notes** allows free-format notes to be added to the Booking under a range of predefined Note Categories, which must first have been set up via **Home > System > Code Setup > Messaging > Notes**. Notes can be output on documents and messages to both agents and suppliers if the note category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

Insert an Agent Note

1. If you haven't already done so, search for and retrieve a Booking to work with (see ["Retrieve an Existing Quote/Booking" on page 55](#)).
2. The default view for a Booking is the **Dashboard View**.
3. To examine and work with agent notes, from the FITs menu, select **FITs > Booking Details > Agent Notes**.
4. From the list of **agent notes** returned, click any note to open it.

+	CAT	DESCRIPTION	CREATED	CREATED BY	UPDATED	UPDATED BY
	ACC	Credit Control/Accounting	05-Mar-2025 16:49:50	PA-STEVEDODSON	05-Mar-2025 16:49:50	PA-STEVEDODSON

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



Agent Notes

DELETE EXIT SAVE

CATEGORY TYPE ACC - Credit Control/Accounting

Format - Font - Size - B I U A - [Rich Text Editor Icons]

Payment must be received no later than 30 days prior to travel

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

Recalculate Booking

This is the last task described in this user manual for changing booking details.

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

The full list is:

1. ["General Setup" on page 69](#)
2. ["Pax Travelling" on page 72](#)
3. ["Markup / Commission" on page 79](#)
4. ["Booking Notes" on page 83](#)
5. ["Agent Notes" on the previous page](#)
6. ["Recalculate Booking" above](#) (this task)

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

Recalculate a Booking

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. To re-calculate the booking select from the FITs menu, **FITs > Booking Details > Recalculate**.
3. From the **Recalculate Booking** screen, click **Yes** to recalculate booking costs and prices.



4. To keep the changes, click **Yes**.
5. Click **Exit** to discard any changes.

About the Recalculate Booking Fields

Replace Mark-up and Commission Percentages - this revisits the product database or the discount commission matrix to re-calculate the %.

Recalculate Service Line Prices

- » **Replace All** – Revisits the product database and re-costs all services based on rates from the database.
- » **Replace All But Overrides** – As above, however does not re-cost services where the product database rates have been manually overridden. Manually overridden values will display in a separate dialogue and need to be confirmed with the 'OK' button.
- » **No Prices** – Recalculates the totals based on the existing service line values.
- » **Update Exchange Rates** – 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 Exchange Rates table for the new travel date (checked).

Copy Booking

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



Copied bookings should retain the original bookings pax names, changing a pax name in the copied booking will result in the re-naming of the original pax name found in the CRM.

The correct procedure to copy a booking for a different group requires the creation of a new booking and the use of the 'Insert Booking' function to insert the old booking into the new booking. Click on the link for more information on the ["Insert Booking" on page 119](#) procedure.

Copy a Booking

1. If you haven't already done so, search for and retrieve a Booking to work with (see ["Retrieve an Existing Quote/Booking" on page 55](#)).

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

From the FITs menu, select **FITs > Booking Details** click **Copy Booking**.

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

4. Click **OK** to keep the changes and save or update the entry.
5. Click **Exit** to discard any changes.

About the Copy Booking Fields

New Name

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

New Name Alias

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

Copy Booking Notes

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

New Travel Date

Enter a new travel date if applicable.

New Agent

An alternative agent can be selected if required.

New Consultant

Select the Consultant Code as required.

New Status

Select the new PCM status as required.

New Branch

An alternative branch can be selected if required.

New Department

An alternative department can be selected if required.

Service Line Price Codes

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

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

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

CHAPTER 5

Itinerary Menu

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

When a single service is displayed, the finer details of the service as it relates to the booking are available for editing – such things as Voucher Text and Pickup/Dropoff details. It's common for a booking consultant to get all services confirmed before entering these details; it is this functionality that is in NX under the FITs > Itinerary view.

In this chapter ...

Itinerary Menu	92
Pickup / Dropoff	93
Voucher Text	97
Service Notes	102
Product Notes	107
PCM Management FITs	110
Change Travel Date	113
Manage Days	116
Insert Booking	119

Itinerary Menu

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

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

FITs	
DASHBOARD	
BOOKING DETAILS	
ITINERARY	
PICKUP/DROPOFF	Adjust Pickup or Dropoff Details
VOUCHER TEXT	Add or Modify Voucher Text
SERVICE NOTES	Insert or Update Service Notes
PRODUCT NOTES	View Product Notes
PCM MANAGEMENT	Manage PCM Information
CHANGE TRAVEL DATE	Change Travel Dates
MANAGE DAYS	Insert, Delete or Resequence Days
INSERT BOOKING	Insert a Booking

Pickup / Dropoff

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

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

The full list is:

1. ["Pickup / Dropoff" above](#) (this task)
2. ["Voucher Text" on page 97](#)
3. ["Service Notes" on page 102](#)
4. ["Product Notes" on page 107](#)
5. ["PCM Management FITs" on page 110](#)
6. ["Change Travel Date" on page 113](#)
7. ["Manage Days" on page 116](#)
8. ["Insert Booking" on page 119](#)

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

NOTE:

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

Adjust Pickup or Dropoff Details

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.

- a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K	REFERENCE	USF1104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Confirmed

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...	156.80
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00
23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	
23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	89.96
23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...	741.49
24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise	100.86
24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...	2,118.16
25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	218.09
25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	618.82
26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)	79.06
26 Apr	ROT	Rotorua Museum	Admission To Museum	38.08
26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa	53.76
26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert	272.61

BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)	
COST	10,020.84	MARKUP (21.34%)	2,137.96	INVOICES	0.00
RETAIL	12,158.80	COMMISSION (0.00%)	0.00	RECEIPTS	0.00
AGENT	12,158.80	TAX	1,585.93	TO BE INVOICED	12,158.80
AGENT (TAX INCLUSIVE)	12,158.80	MARGIN (17.58%)	2,137.96	TOTAL DUE	0.00

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs** menu, **FITs > Itinerary**.
- c. Examine the **Itinerary** on this screen.

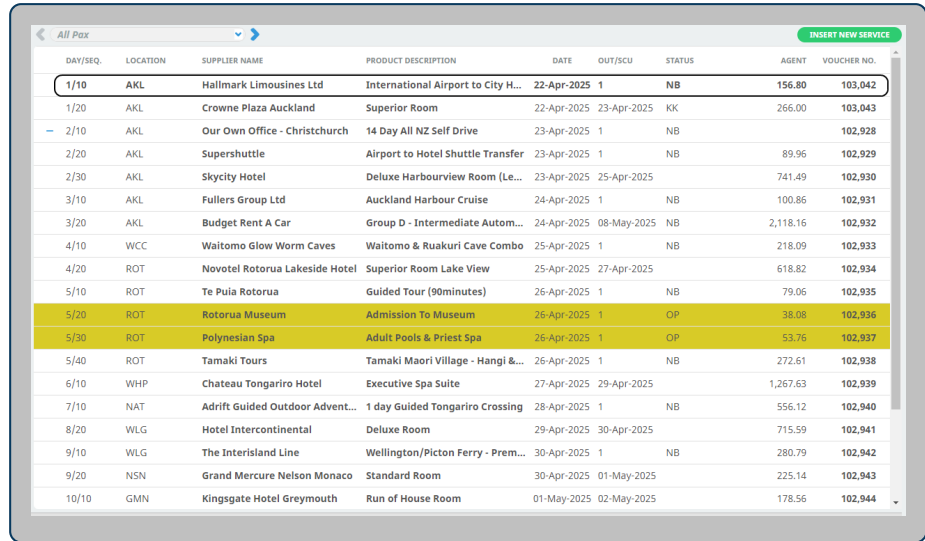
All Pax							INSERT NEW SERVICE	
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. There are two ways to change pickup/dropoff details from the Itinerary view:

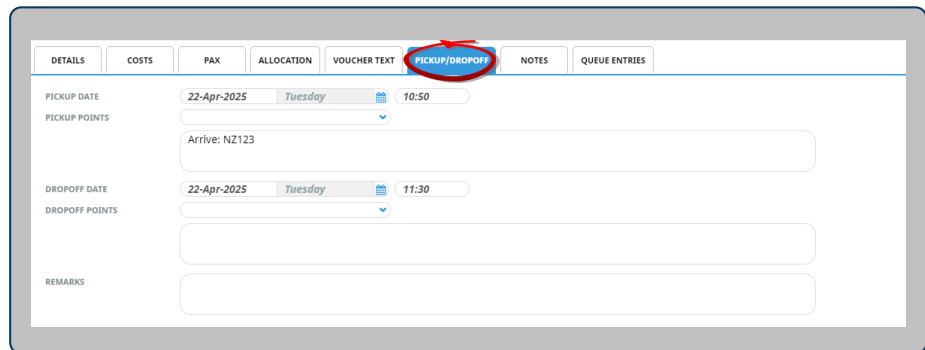
a. Change pickup/dropoff via *service line drill-down*:

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



DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944

ii. Click the **Pickup/Dropoff** tab.



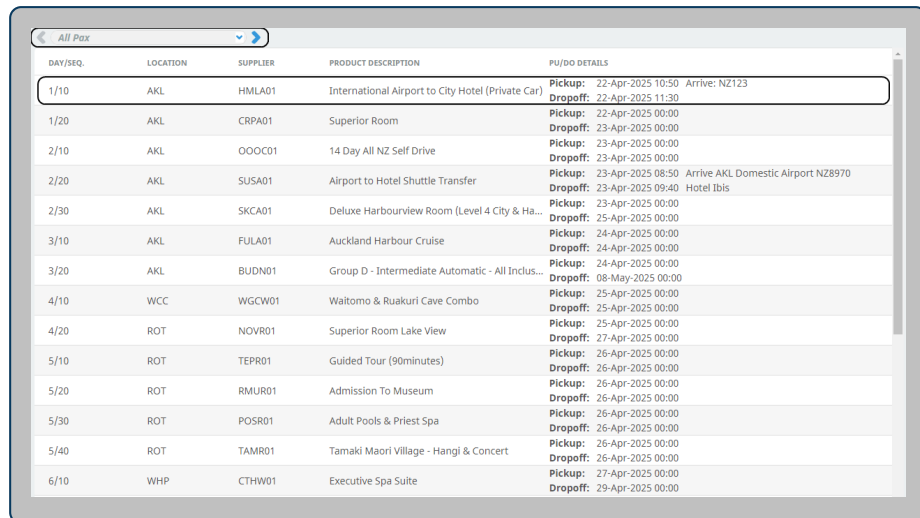
DETAILS	COSTS	PAX	ALLOCATION	VOUCHER TEXT	PICKUP/DROPOFF	NOTES	QUEUE ENTRIES
<p>PICKUP DATE: 22-Apr-2025 Tuesday 10:50</p> <p>PICKUP POINTS: Arrive: NZ123</p> <p>DROPOFF DATE: 22-Apr-2025 Tuesday 11:30</p> <p>DROPOFF POINTS:</p> <p>REMARKS:</p>							

iii. Modify any fields as required.

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

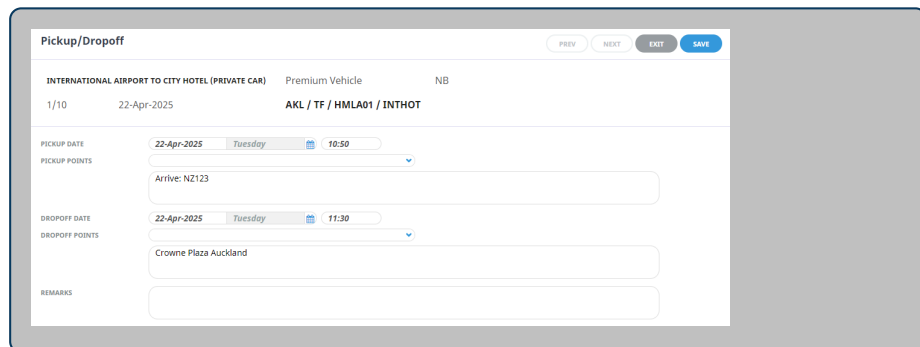
b. Change pickup/dropoff details via the *FITs menu*:

- i. Select menu **FITs > Itinerary > Pickup/Dropoff**.
- ii. Click the **service line** whose PU/DO Details you want to change.



DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	PU/DO DETAILS
1/10	AKL	HMLA01	International Airport to City Hotel (Private Car)	Pickup: 22-Apr-2025 10:50 Arrive: NZ123 Dropoff: 22-Apr-2025 11:30
1/20	AKL	CRPA01	Superior Room	Pickup: 22-Apr-2025 00:00 Dropoff: 23-Apr-2025 00:00
2/10	AKL	OOC001	14 Day All NZ Self Drive	Pickup: 23-Apr-2025 00:00 Dropoff: 23-Apr-2025 00:00
2/20	AKL	SUSA01	Airport to Hotel Shuttle Transfer	Pickup: 23-Apr-2025 08:50 Arrive AKL Domestic Airport NZ8970 Dropoff: 23-Apr-2025 09:40 Hotel Ibis
2/30	AKL	SKCA01	Deluxe Harbourview Room (Level 4 City & Ha...	Pickup: 23-Apr-2025 00:00 Dropoff: 25-Apr-2025 00:00
3/10	AKL	FULA01	Auckland Harbour Cruise	Pickup: 24-Apr-2025 00:00 Dropoff: 24-Apr-2025 00:00
3/20	AKL	BUDN01	Group D - Intermediate Automatic - All Includ...	Pickup: 24-Apr-2025 00:00 Dropoff: 08-May-2025 00:00
4/10	WCC	WGCW01	Waitomo & Ruakuri Cave Combo	Pickup: 25-Apr-2025 00:00 Dropoff: 25-Apr-2025 00:00
4/20	ROT	NOVR01	Superior Room Lake View	Pickup: 25-Apr-2025 00:00 Dropoff: 27-Apr-2025 00:00
5/10	ROT	TEPR01	Guided Tour (90minutes)	Pickup: 26-Apr-2025 00:00 Dropoff: 26-Apr-2025 00:00
5/20	ROT	RMUR01	Admission To Museum	Pickup: 26-Apr-2025 00:00 Dropoff: 26-Apr-2025 00:00
5/30	ROT	POSR01	Adult Pools & Priest Spa	Pickup: 26-Apr-2025 00:00 Dropoff: 26-Apr-2025 00:00
5/40	ROT	TAMR01	Tamaki Maori Village - Hangi & Concert	Pickup: 26-Apr-2025 00:00 Dropoff: 26-Apr-2025 00:00
6/10	WHP	CTHW01	Executive Spa Suite	Pickup: 27-Apr-2025 00:00 Dropoff: 29-Apr-2025 00:00

- iii. On the **Pickup/Dropoff Details** screen, modify fields as required. The **Previous** and **Next** buttons, if selected, will display the previous and next services from the itinerary list for pick up and drop off details to be entered.



Pickup/Dropoff PREVIOUS NEXT EXIT SAVE

INTERNATIONAL AIRPORT TO CITY HOTEL (PRIVATE CAR) Premium Vehicle NB

1/10 22-Apr-2025 AKL / TF / HMLA01 / INTHOT

PICKUP DATE: 22-Apr-2025 Tuesday 10:50

PICKUP POINTS: Arrive: NZ123

DROPOFF DATE: 22-Apr-2025 Tuesday 11:30

DROPOFF POINTS: Crowne Plaza Auckland

REMARKS:

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

Our examples use 24 hour clock, there is a setting in Tourplan NX INI's which will allow user companys to format time settings system wide.

NOTE:

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

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



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

Refer to ["Add Services to an FIT Booking"](#) on page 35 for more information on adding additional services.

Voucher Text

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

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

The full list is:

1. ["Pickup / Dropoff" on page 93](#)
2. ["Voucher Text" above \(this task\)](#)
3. ["Service Notes" on page 102](#)
4. ["Product Notes" on page 107](#)
5. ["PCM Management FITs" on page 110](#)
6. ["Change Travel Date" on page 113](#)
7. ["Manage Days" on page 116](#)
8. ["Insert Booking" on page 119](#)

The Voucher Text screen allows viewing and editing of the voucher text fields. The voucher text for all services in the booking is displayed.

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

One advantage to using voucher text fields is to limit the note text displaying on your messages to a certain length. This is particularly helpful if vouchers are to be printed 3 per page.

Add or Modify Voucher Text

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K		REFERENCE	USFI104568	TRAVEL DATE	22-Apr-2025
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff	STATUS	Confirmed
DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT		
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...	156.80		
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00		
23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive			
23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	89.96		
23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...	741.49		
24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise	100.86		
24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...	2,118.16		
25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	218.09		
25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	618.82		
26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)	79.06		
26 Apr	ROT	Rotorua Museum	Admission To Museum	38.08		
26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa	53.76		
26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert	272.61		
BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)		
COST	10,020.84	MARKUP (21.34%)	2,137.96	INVOICES	0.00	
RETAIL	12,158.80	COMMISSION (0.00%)	0.00	RECEIPTS	0.00	
AGENT	12,158.80	TAX	1,585.93	TO BE INVOICED	12,158.80	
AGENT (TAX INCLUSIVE)	12,158.80	MARGIN (17.58%)	2,137.96	TOTAL DUE	0.00	

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
- c. Examine the **Itinerary** on this screen.

All Pax							INSERT NEW SERVICE	
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. There are two ways to change voucher text from the Itinerary view:

a. Change voucher text via *service line drill-down*:

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

All Pax

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944

ii. Click the **Voucher Text** tab.

- iii. Modify any fields as required.
- iv. Click **Save** to keep the changes, followed by **Exit** to return to the Itinerary.
- b. Change Voucher Text details via the *FITs menu*:
 - i. Select menu **FITs > Itinerary > Voucher Text**.
 - ii. Click the **service line** whose Voucher details you want to change.

DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	VOUCHER NO.	VOUCHER TEXT
1/10	AKL	HMLA01	International Airport to City Hot...	103,042	
1/20	AKL	CRPA01	Superior Room	103,043	
2/10	AKL	OOOC01	14 Day All NZ Self Drive	102,928	
2/20	AKL	SUSA01	Airport to Hotel Shuttle Transfer	102,929	
2/30	AKL	SKCA01	Deluxe Harbourview Room (Lev...	102,930	
3/10	AKL	FULA01	Auckland Harbour Cruise	102,931	
3/20	AKL	BUDN01	Group D - Intermediate Automa...	102,932	
4/10	WCC	WGCW01	Waitomo & Ruakuri Cave Combo	102,933	
4/20	ROT	NOVR01	Superior Room Lake View	102,934	
5/10	ROT	TEPR01	Guided Tour (90minutes)	102,935	
5/20	ROT	RMUR01	Admission To Museum	102,936	
5/30	ROT	POSR01	Adult Pools & Priest Spa	102,937	
5/40	ROT	TAMR01	Tamaki Maori Village - Hangi & ...	102,938	
6/10	WHP	CTHW01	Executive Spa Suite	102,939	
7/10	NAT	AGON01	1 day Guided Tongariro Crossing	102,940	
8/20	WLG	HOWG01	Deluxe Room	102,941	
9/10	WLG	ILLW01	Wellington/Picton Ferry - Premi...	102,942	S1 Passengers only - report 45 minutes prior S2 If you have a vehicle report 1 hour prior
9/20	NSN	GMMN01	Standard Room	102,943	
10/10	GMN	KGHG01	Run of House Room	102,944	

- iii. On the **Voucher Text** screen, modify fields as required. The **Previous** and **Next** buttons, if selected, will display the previous and next services from the itinerary list for Voucher

Text to be entered.

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

About the Voucher Text Fields

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

NOTE:

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

Example: Voucher Text

Voucher number 100322 below has one line of voucher text at Line 1 of the Service Voucher Text and 0 lines of the Rate Voucher Text. This means there can be voucher text which relates to the service in general, but nothing that applies specifically to a rate, rate period or price code; e.g. information relating to a special promotion taking place for a limited period.

The voucher text has been inserted at the Product level (and has been selected within the product as a non-editable field) - this is why the voucher text line 1 in this example is grey.

DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	VOUCHER NO. VOUCHER TEXT
1/5	AKL	HMLA01	International Airport to City Hote...	100,321
1/10	AKL	AMOA01	Deluxe Room	100,322 \$1 Room Only unless specified otherwise
1/20	AKL	BUDN01	Group A - Sub Compact Manual	100,323
2/20	AKL	GRSA01	Auckland Morning City Sights + K...	100,324
5/5	MAT	HMSM01	Movie Set & Farm Tour	100,325
5/10	ROT	MILR01	Superior Room	100,326
6/10	ROT	AGPR01	Sheep Show	100,327
6/20	ROT	POSR01	Adult Pools & Priest Spa	100,328

Voucher Text

PREV

NEXT

EXIT

SAVE

DELUXE ROOM

1/10

29-Apr-2024

AKL / AC / AMOA01 / DELUXE

VOUCHER NO.

100,322

VOUCHER STATUS

Closed

PRODUCTION

Product Default

ADDRESS

Amora Hotel Auckland

100 Greys Avenue

Auckland

New Zealand

SERVICE VOUCHER TEXT

1

Room Only unless specified otherwise

REFRESH

2

3

4

5

6

7

8

9

10

11

12

RATE VOUCHER TEXT

1

REFRESH

2

3

4

5

6

7

8

9

10

11

12

Refresh Buttons

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

Service Notes

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

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

The full list is:

1. "Pickup / Dropoff" on page 93
2. "Voucher Text" on page 97
3. "Service Notes" above (this task)
4. "Product Notes" on page 107
5. "PCM Management FITs" on page 110
6. "Change Travel Date" on page 113
7. "Manage Days" on page 116
8. "Insert Booking" on page 119

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

There are two locations service notes can be viewed or maintained. Accessing the service note from the itinerary view, maintaining note information for an individual service. The alternative is to view and maintain all service notes from the **Itinerary Menu > Service Notes**. Notes can be filtered by note category.

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

Insert or Update Service Notes

1. Search for and retrieve a booking to work with. If you haven't done this already, see "[Retrieve an Existing Quote/Booking](#)" on page 55.
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K		REFERENCE	USFI104568		TRAVEL DATE	22-Apr-2025	
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff		STATUS	Confirmed	
DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION				AGENT	
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...				156.80	
22 Apr	AKL	Crowne Plaza Auckland	Superior Room				266.00	
23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive					
23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer				89.96	
23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...				741.49	
24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise				100.86	
24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...				2,118.16	
25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo				218.09	
25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View				618.82	
26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)				79.06	
26 Apr	ROT	Rotorua Museum	Admission To Museum				38.08	
26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa				53.76	
26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert				272.61	
BOOKING SUMMARY (NZD)						ACCOUNTS SUMMARY (NZD)		
COST	10,020.84	MARKUP (21.34%)	2,137.96		INVOICES	0.00		
RETAIL	12,158.80	COMMISSION (0.00%)	0.00		RECEIPTS	0.00		
AGENT	12,158.80	TAX	1,585.93		TO BE INVOICED	12,158.80		
AGENT (TAX INCLUSIVE)	12,158.80	MARGIN (17.58%)	2,137.96		TOTAL DUE	0.00		

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
- c. Examine the **Itinerary** on this screen.

FITs User Manual

All Pax								INSERT NEW SERVICE	
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.	
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042	
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043	
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928	
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929	
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930	
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931	
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932	
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933	
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934	
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935	
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936	
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937	
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938	
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939	
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940	
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941	
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942	
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943	
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944	

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. There are two ways to change note text from the Itinerary view:

a. Change or View Note via the **FITs Menu**:

i. Select menu **FITs > Itinerary > Service Notes**.

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

FILTER									
		<input checked="" type="radio"/> SERVICES <input type="radio"/> NOTE CATEGORY		CATEGORY		All Categories			
+ DAY/SEQ.	DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS		
1 / 10	22-Apr-2025	AKL	TF	INTHOT	International Airport to City Hotel (Private Car)	Hallmark Limousines Ltd	NB	NEW NOTE	
1 / 20	22-Apr-2025	AKL	AC	ROH	Superior Room	Crowne Plaza Auckland	KK	NEW NOTE	
2 / 10	23-Apr-2025	AKL	PK	14SDR	14 Day All NZ Self Drive	Our Own Office - Christchurch	NB	NEW NOTE	
2 / 20	23-Apr-2025	AKL	TF	APTHOT	Airport to Hotel Shuttle Transfer	Supershuttle	NB	NEW NOTE	
2 / 30	23-Apr-2025	AKL	AC	DLHAR	Deluxe Harbourview Room (Level 4 City & Har...	Skycity Hotel		NEW NOTE	
3 / 10	24-Apr-2025	AKL	CR	AMHACR	Auckland Harbour Cruise	Fullers Group Ltd	NB	NEW NOTE	
3 / 20	24-Apr-2025	AKL	RV	IDARI	Group D - Intermediate Automatic - All Inclusive	Budget Rent A Car	NB	NEW NOTE	
4 / 10	25-Apr-2025	WCC	EF	WAIKUA	Waitomo & Ruakuri Cave Combo	Waitomo Glow Worm Caves	NB	NEW NOTE	
4 / 20	25-Apr-2025	ROT	AC	LAKEVI	Superior Room Lake View	Novotel Rotorua Lakeside Hotel		NEW NOTE	
5 / 10	26-Apr-2025	ROT	EF	VISIT	Guided Tour (90minutes)	Te Puia Rotorua	NB	NEW NOTE	
5 / 20	26-Apr-2025	ROT	EF	ADMISS	Admission To Museum	Rotorua Museum	OP	NEW NOTE	
5 / 30	26-Apr-2025	ROT	EF	VISIT	Adult Pools & Priest Spa	Polynesian Spa	OP	NEW NOTE	
5 / 40	26-Apr-2025	ROT	ME	HANGI	Tamaki Maori Village - Hangi & Concert	Tamaki Tours	NB	NEW NOTE	
6 / 10	27-Apr-2025	WHP	AC	ROHEX	Executive Spa Suite	Chateau Tongariro Hotel		NEW NOTE	
7 / 10	28-Apr-2025	NAT	SS	1DAYTC	1 day Guided Tongariro Crossing	Adrift Guided Outdoor Adven...	NB	NEW NOTE	
8 / 20	29-Apr-2025	WLG	AC	SUPRM	Deluxe Room	Hotel Intercontinental		NEW NOTE	

i. Modify any fields as required.

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

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

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

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934
5/10	ROT	Te Pua Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944

- ii. Click the **Note** tab.

Service Details

GROUP D - INTERMEDIATE AUTOMATIC - ALL INCLUSIVE NB

3/20 24-Apr-2025 AKL / RV / BUDN01 / IDARI

MESSAGES: Package service - restrictions apply

DETAILS COSTS PAX ALLOCATION VOUCHER TEXT PICKUP/DROPOFF **NOTES** QUEUE ENTRIES

NEW NOTE

4. To insert a new note, click button **New Note**.

NEW NOTE

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

Service Notes

DELETE EXIT SAVE

GROUP D - INTERMEDIATE AUTOMATIC - ALL INCLUSIVE NB

3/20 24-Apr-2025 AKL / RV / BUDN01 / IDARI

CATEGORY TYPE: SGI - Booking Service - Internal

Normal Arial 10 B I U A- [Rich Text Editor Icons]

Preference for Toyota Corolla advised 22/03

Click **Save** to keep the note and return to the list, otherwise, click **Exit**.

5. To view an existing note from the **Service Notes** list, view the note just added by **expanding it** (i.e. clicking the **+** icon).

FILTER

SERVICES

NOTE CATEGORY

CATEGORY

All Categories

<div><div><div></div></div></div> <div>+</div> <div>DAY/SEQ.</div>	DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS
1 / 10	22-Apr-2025	AKL	TF	INTHOT	International Airport to City Hotel (Private Car)	Hallmark Limousines Ltd	NB <div>NEW NOTE</div>
1 / 20	22-Apr-2025	AKL	AC	ROH	Superior Room	Crowne Plaza Auckland	KK <div>NEW NOTE</div>
2 / 10	23-Apr-2025	AKL	PK	14SDR	14 Day All NZ Self Drive	Our Own Office - Christchurch	NB <div>NEW NOTE</div>
2 / 20	23-Apr-2025	AKL	TF	APTHOT	Airport to Hotel Shuttle Transfer	Supershuttle	NB <div>NEW NOTE</div>
2 / 30	23-Apr-2025	AKL	AC	DLHAR	Deluxe Harbourview Room (Level 4 City & Har...	Skycity Hotel	<div>NEW NOTE</div>
3 / 10	24-Apr-2025	AKL	CR	AMHACR	Auckland Harbour Cruise	Fullers Group Ltd	NB <div>NEW NOTE</div>
<div><div><div></div></div></div> <div>-</div> <div>3 / 20</div>	24-Apr-2025	AKL	RV	IDARI	Group D - Intermediate Automatic - All Inclusive Budget Rent A Car		NB <div>NEW NOTE</div>
<div><div><div></div></div></div> <div>-</div> <div>CAT</div>	DESCRIPTION	CREATED	CREATED BY	UPDATED	UPDATED BY		
SGI	<div><div></div><div></div>Booking Service - Internal</div>	22-Mar-2025 15:51:14	PA-NAOMIJOHNS	22-Mar-2025 15:51:14	PA-NAOMIJOHNS		
Preference for Toyota Corolla advised 22/03							
4 / 10	25-Apr-2025	WCC	EF	WAIKUA	Waitomo & Ruakuri Cave Combo	Waitomo Glow Worm Caves	NB <div>NEW NOTE</div>
4 / 20	25-Apr-2025	ROT	AC	LAKEVI	Superior Room Lake View	Novotel Rotorua Lakeside Hotel	<div>NEW NOTE</div>
5 / 10	26-Apr-2025	ROT	EF	VISIT	Guided Tour (90minutes)	Te Puia Rotorua	NB <div>NEW NOTE</div>
5 / 20	26-Apr-2025	ROT	EF	ADMISS	Admission To Museum	Rotorua Museum	OP <div>NEW NOTE</div>
5 / 30	26-Apr-2025	ROT	EF	VISIT	Adult Pools & Priest Spa	Polynesian Spa	OP <div>NEW NOTE</div>

NOTE:

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



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

Service Note Filtering

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

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












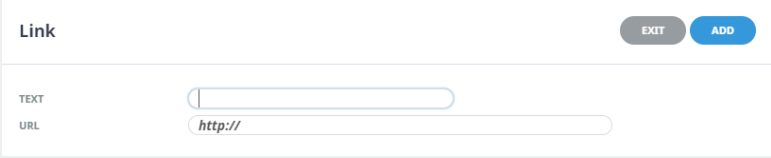

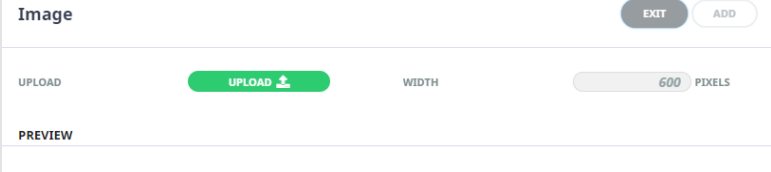





- » Filtered note entries can be viewed service by service using the dropdown arrow. The note expands for users and longer note entries can be viewed using the scroll bar provided.
- » Alternatively, users can open the Product Note screen to view the full note entry when selecting the magnifying glass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

About Service Note Formatting Fields

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

The Editing screen has the following items:

Format type	Format Option Descriptions
Format	Format of the paragraph text. Normal, Headings 1,2,3,4,5, & 6, Formatted, Address,
Font	Font of text (will default from the INI Setting DEFAULTFONT)
Size	Font Size of text (will default from the INI Setting DEFAULTEDITFONTSIZE)

Format type	Format Option Descriptions
	Style, Font and Font Size. The available styles and fonts are the Windows styles and fonts installed on the computer running Tourplan
	Bold - highlight the text to be bold faced and click this button
	Italics - highlight the text to be italic and click this button
	Underline - highlight the text to be underlined and click this button
	Colour of text – highlight the text to change the colour and click this button
	Numbered bullet points - click this button to create a numbered list
	Bullet points - click this button to create a bulleted list
	Left aligned text - click this button to justify text on the left margin
	Centre aligned text - click this button to centre text between the left and right margins
	Right aligned text - click this button to justify text on the right margin
	Left and Right justified text. Click this button to justify text between the left & right margins
	<p>Insert a URL link – click this button to insert the text you want showing as a hyperlink and insert the required URL</p> 
	<p>Upload an image – click this button to upload an image</p> 
	Insert a table – click this button to insert a table
	Cut text (Ctrl+X) highlight text to be cut and click this button
	Copy text (Ctrl+C) highlight text to be copied and click this button
	Paste text (Ctrl+V) place the cursor at the point where copied/cut text is to be placed and click this button
	Selecting this button will show the text editor in CSS styling source code

Product Notes

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

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

The full list is:

1. ["Pickup / Dropoff" on page 93](#)
2. ["Voucher Text" on page 97](#)
3. ["Service Notes" on page 102](#)
4. ["Product Notes" above \(this task\)](#)
5. ["PCM Management FITs" on page 110](#)
6. ["Change Travel Date" on page 113](#)
7. ["Manage Days" on page 116](#)
8. ["Insert Booking" on page 119](#)

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

View Product Notes

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K		REFERENCE	USF104568		TRAVEL DATE	22-Apr-2025	
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff		STATUS	Confirmed	
	DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION			AGENT	
	22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...			156.80	
	22 Apr	AKL	Crowne Plaza Auckland	Superior Room			266.00	
—	23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive				
	23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer			89.96	
	23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...			741.49	
	24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise			100.86	
	24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...			2,118.16	
	25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo			218.09	
	25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View			618.82	
	26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)			79.06	
	26 Apr	ROT	Rotorua Museum	Admission To Museum			38.08	
	26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa			53.76	
	26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert			272.61	
BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)				
COST		10,020.84	MARKUP (21.34%)	2,137.96		INVOICES		0.00
RETAIL		12,158.80	COMMISSION (0.00%)	0.00		RECEIPTS		0.00
AGENT		12,158.80	TAX	1,585.93		TO BE INVOICED		12,158.80
AGENT (TAX INCLUSIVE)		12,158.80	MARGIN (17.58%)	2,137.96		TOTAL DUE		0.00

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
- c. Examine the **Itinerary** on this screen.

CHAPTER 5 | Itinerary Menu

All Pax								Insert New Service	
Day/Seq.	Location	Supplier Name	Product Description	Date	Out/Scu	Status	Agent	Voucher No.	
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042	
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043	
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928	
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929	
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930	
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931	
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932	
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933	
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934	
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935	
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936	
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937	
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938	
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939	
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940	
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941	
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942	
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943	
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944	

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. Select menu **FITs > Itinerary > Product Notes**.
4. From the list of services, click the **service line** whose product notes you want to view in detail.

FILTER									
<input checked="" type="radio"/> SERVICES		<input type="radio"/> NOTE CATEGORY		CATEGORY		All Categories			
+ DAY/SEQ.	DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS		
1 / 10	22-Apr-2025	AKL	TF	INTHOT	International Airport to City Hotel (Private Car)	Hallmark Limousines Ltd	IS	NEW NOTE	
1 / 20	22-Apr-2025	AKL	AC	ROH	Superior Room	Crowne Plaza Auckland	IS	NEW NOTE	
1 / 30	22-Apr-2025	AKL	EF	TOWER	Access to Main Observations & SkyDeck	Sky Tower	IS	NEW NOTE	

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

FILTER

SERVICES

NOTE CATEGORY

CATEGORY

All Categories

+ DAY/SEQ.

DATE

LOCATION

SERVICE

OPTION

DESCRIPTION

NAME

STATUS

+ 1 / 10

22-Apr-2025

AKL

TF

INTHOT

International Airport to City Hotel (Private Car)

Hallmark Limousines Ltd

NB

- 1 / 20

22-Apr-2025

AKL

AC

ROH

Superior Room

Crowne Plaza Auckland

KK

+ CAT

DESCRIPTION

CREATED

CREATED BY

UPDATED

UPDATED BY

PGN

Product General - Internal

08-Sep-2017 04:06:08

TOURPLAN

02-Jul-2021 03:28:53

TOURPLAN

Configuration:
Single & Twin: 1king or 2Queen
Triple: 2Queen + Rollaway

PWD

Itinerary (Short) Description

10-Sep-2018 04:04:42

TOURPLAN

02-Jul-2021 03:28:53

TOURPLAN

DCP

Child Policy

23-Mar-2018 01:21:17

TOURPLAN

02-Jul-2021 03:28:53

TOURPLAN

DI1

Default Image

12-May-2022 03:57:00

GEOFF

12-May-2022 03:57:00

GEOFF

DSP

Product Specials/Extras

10-Sep-2017 03:20:14

TOURPLAN

02-Jul-2021 03:28:53

TOURPLAN

PID

Itinerary (Long) Description

07-Sep-2017 21:51:00

TOURPLAN

02-Jul-2021 03:28:53

TOURPLAN

From the expanded list, view text associated with each note by clicking the **down** icon (highlighted). Also highlighted (at right) is the scroll bar for note text that occupies more screen real estate than is displayed.

Note Filtering

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

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

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

FILTER								
<input type="radio"/> SERVICES <input checked="" type="radio"/> NOTE CATEGORY		CATEGORY <i>Child Policy</i>						
CATEGORY		DESCRIPTION				NOTE TYPE		
DCP		Child Policy				Product Supplier		
+ DAY/SEQ.		DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS
1 / 20	▼	22-Apr-2025	AKL	AC	ROH	Superior Room	Crowne Plaza Auckland	KK
2 / 30	▼	23-Apr-2025	AKL	AC	DLHAR	Deluxe Harbourview Room (Level 4 City & ...	Skycity Hotel	
4 / 20	▼	25-Apr-2025	ROT	AC	LAKEVI	Superior Room Lake View	Novotel Rotorua Lakeside H...	
8 / 20	▼	29-Apr-2025	WLG	AC	SUPRM	Deluxe Room	Hotel Intercontinental	
10 / 10	▼	01-May-2025	GMN	AC	ROH	Run of House Room	Kingsgate Hotel Greymouth	
12 / 10	▼	03-May-2025	ZQN	AC	1BRAPL	One Bedroom Alpine Lakeview Suite	Hotel St Moritz	
14 / 10	▼	05-May-2025	CHC	AC	ROH	Superior Room	Commodore Airport Hotel	

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

FILTER								
<input type="radio"/> SERVICES <input checked="" type="radio"/> NOTE CATEGORY		CATEGORY <i>Child Policy</i>						
CATEGORY		DESCRIPTION				NOTE TYPE		
DCP		Child Policy				Product Supplier		
+ DAY/SEQ.		DATE	LOCATION	SERVICE	OPTION	DESCRIPTION	NAME	STATUS
1 / 20	^	22-Apr-2025	AKL	AC	ROH	Superior Room	Crowne Plaza Auckland	KK
						<u>Room Policy</u> Children 19 years and under may share a room with a paying adult using existing bedding for no extra charge.		
2 / 30	^	23-Apr-2025	AKL	AC	DLHAR	Deluxe Harbourview Room (Level 4 City & ...	Skycity Hotel	
						<u>Room Policy</u> Two children aged 14 years and under may share a room with a paying adult using existing bedding for no extra charge.		
4 / 20	^	25-Apr-2025	ROT	AC	LAKEVI	Superior Room Lake View	Novotel Rotorua Lakeside ...	
						<u>Room Policy</u> Children 15 years and under may share a room with a paying adult using existing bedding for no extra charge. Maximum of two children per room.		
8 / 20	^	29-Apr-2025	WLG	AC	SUPRM	Deluxe Room	Hotel Intercontinental	
						<u>Room Policy</u> Children 19 years and under may share a room with a paying adult using existing bedding for no extra charge. Maximum of two children per room.		
10 / 10	^	01-May-2025	GMN	AC	ROH	Run of House Room	Kingsgate Hotel Greymouth	

PCM Management FITs

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

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

The full list is:

1. "Pickup / Dropoff" on page 93
2. "Voucher Text" on page 97
3. "Service Notes" on page 102
4. "Product Notes" on page 107
5. "PCM Management FITs" above (this task)
6. "Change Travel Date" on page 113
7. "Manage Days" on page 116
8. "Insert Booking" on page 119

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

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

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

Manage PCM Information

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard view**.

CANCEL QUOTE

CONVERT QUOTE

EXIT

NAME


Robson Mr & Mrs K

REFERENCE

USFI104568

TRAVEL DATE

22-Apr-2025



AGENT

SPBBRY - South Pacific & Beyond

CONSULTANT

Geoff

STATUS

Quotation

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private Car)	156.80
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	266.00
22 Apr	AKL	Sky Tower	Access to Main Observations & SkyDeck	47.04

BOOKING SUMMARY (NZD)

COST

424.48

MARKUP (10.69%)

45.36

RETAIL

469.84

COMMISSION (0.00%)

0.00

AGENT

469.84

TAX

61.28

AGENT (TAX INCLUSIVE)

469.84

MARGIN (9.65%)

45.36

ACCOUNTS SUMMARY (NZD)

INVOICES

0.00

RECEIPTS

0.00

TO BE INVOICED

469.84

TOTAL DUE

0.00

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
- c. Examine the **itinerary** on this screen.

NAME

Robson Mr & Mrs K

AGENT

SPBBRY - South Pacific & Beyond

REFERENCE

USFI104568

CONSULTANT

Geoff

TRAVEL DATE

22-Apr-2025

STATUS

Quotation

<

All Pax

>

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City Hot...	22-Apr-2025	1	IS	156.80	103,665
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	IS	266.00	103,675
1/30	AKL	Sky Tower	Access to Main Observations & S...	22-Apr-2025	1	IS	47.04	103,667

NOTE: The service lines shown in the example Itinerary above cover all services for all pax, however, some services may not apply to some pax. To see which services apply to which pax, click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. Select menu **FITs > Itinerary > PCM Management**.
4. If there is no existing PCM for this booking, the **Insert PCM** screen is displayed.

5. Enter the name of the PCM in the PCM Name field (you can also search for existing PCMs). Complete all other fields as required (see the example above) and click **Save** to attach this PCM and show the **PCM Management** screen.

PCM NAME	LINKED	SEQ	DAY/SEQ	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	DATE	SCU STATUS
14 Day All NZ Self Drive	<input checked="" type="checkbox"/>	1	1/10	AKL	HMLA01	International Airport to City ...	22-Apr-2025	1 IS
	<input type="checkbox"/>		1/20	AKL	CRPA01	Superior Room	22-Apr-2025	1 IS
	<input type="checkbox"/>		1/30	AKL	SKTA01	Access to Main Observations...	22-Apr-2025	1 IS
	<input type="checkbox"/>		1/31	AKL	SUSA01	Airport to Hotel Shuttle Tran...	22-Apr-2025	1
	<input type="checkbox"/>		1/40	AKL	SKCA01	Deluxe Harbourview Room (...)	22-Apr-2025	2
	<input type="checkbox"/>		2/10	AKL	FULA01	Auckland Harbour Cruise	23-Apr-2025	1
	<input type="checkbox"/>		2/20	AKL	BUDN01	Group D - Intermediate Auto...	23-Apr-2025	14
	<input type="checkbox"/>		3/10	WCC	WGCW01	Waltomo & Ruakuri Cave Co...	24-Apr-2025	1
	<input type="checkbox"/>		3/20	ROT	NOVR01	Superior Room Lake View	24-Apr-2025	2
	<input type="checkbox"/>		4/10	ROT	TEPR01	Guided Tour (90minutes)	25-Apr-2025	1 NB

6. To make further changes to a PCM, select it, then click **Edit PCM**.

7. To insert another PCM, click **Insert PCM**.

NOTE: If a PCM is already attached to a booking, the Insert PCM screen no longer appears by default when you select menu FITs > Itinerary > PCM Management. Instead, the PCM Management screen appears, showing all PCMs attached.

As in steps 7 and 8 above, existing PCMs can be modified or new ones added via the **Edit PCM** and **Insert PCM** buttons respectively. These steps will allow users to amend the services within the booking however the original PCM in PCM Quotes will remain unchanged.



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

About the PCM Management Fields

PCM Name

In the example, a 14 Day Self Drive Package has been entered into the booking. The services that display are all part of that package - it is irrelevant that a package has been used in the example; the services could quite as easily have been entered individually.

Insert Type

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

At Day/Seq

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

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

Pax Ranges

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

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

Retain Link to PCM

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

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

If the PCM is unlinked (Retain Link to PCM not selected) the individual services from the PCM will insert and use the product rates loaded in the system for the dates provided in the booking.

Recost PCM Lines

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

Change Travel Date

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

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

The full list is:

1. ["Pickup / Dropoff" on page 93](#)
2. ["Voucher Text" on page 97](#)
3. ["Service Notes" on page 102](#)
4. ["Product Notes" on page 107](#)
5. ["PCM Management FITs" on page 110](#)
6. ["Change Travel Date" above \(this task\)](#)
7. ["Manage Days" on page 116](#)
8. ["Insert Booking" on page 119](#)

This screen allows changes to be made to travel dates, this will amend the date at the header of the booking and selection to amend the services within the booking can occur.

Change Travel Dates

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K		REFERENCE	USF104568		TRAVEL DATE	22-Apr-2025	
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff		STATUS	Confirmed	
DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION				AGENT	
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...				156.80	
22 Apr	AKL	Crowne Plaza Auckland	Superior Room				266.00	
23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive					
23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer				89.96	
23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...				741.49	
24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise				100.86	
24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...				2,118.16	
25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo				218.09	
25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View				618.82	
26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)				79.06	
26 Apr	ROT	Rotorua Museum	Admission To Museum				38.08	
26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa				53.76	
26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert				272.61	
BOOKING SUMMARY (NZD)						ACCOUNTS SUMMARY (NZD)		
COST	10,020.84	MARKUP (21.34%)	2,137.96	INVOICES	0.00			
RETAIL	12,158.80	COMMISSION (0.00%)	0.00	RECEIPTS	0.00			
AGENT	12,158.80	TAX	1,585.93	TO BE INVOICED	12,158.80			
AGENT (TAX INCLUSIVE)	12,158.80	MARGIN (17.58%)	2,137.96	TOTAL DUE	0.00			

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
- c. Examine the **Itinerary** on this screen.

All Pax								INSERT NEW SERVICE	
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.	
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042	
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043	
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928	
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929	
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930	
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931	
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932	
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933	
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934	
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935	
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936	
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937	
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938	
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939	
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940	
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941	
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942	
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943	
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944	

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. Select menu **FITs > Itinerary > Change Travel Date**.
4. On the **Change Travel Date** screen, enter a New Travel Date and click **Save**.

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

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

About Retain Current Service Dates

Unchecked

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

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

- » *Replace All* – Changes the Booking Header date and all service dates and re-costs all services for the revised travel dates.
- » *All Except Overrides* – As above however does not re-cost services where the original database rates were manually overridden. Manually overridden values need to be confirmed with the 'OK' button.
- » *No Prices* – Recalculates the totals based on the existing service line values.
- » *Update Exchange Rates* – When the Booking services are re-costed should Tourplan continue to use the previous Exchange Rates (unchecked) or use the Exchange Rates from the Tourplan Code Setup module Currency Rates table for the new travel date (checked).



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

Checked

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

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

Warning

If the booking has transactions recorded, a warning message will display alerting consultants of possible transaction adjustment requirements.

Warning

Please note this booking has transactions against it. Moving the travel date may require adjustments of existing transactions.

OK

Manage Days

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

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

The full list is:

1. "Pickup / Dropoff" on page 93
2. "Voucher Text" on page 97
3. "Service Notes" on page 102
4. "Product Notes" on page 107
5. "PCM Management FITs" on page 110
6. "Change Travel Date" on page 113
7. "Manage Days" above (this task)
8. "Insert Booking" on page 119

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

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

Manage Days

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K		REFERENCE	USF104568		TRAVEL DATE	22-Apr-2025	
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff		STATUS	Confirmed	
	DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION			AGENT	
	22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...			156.80	
	22 Apr	AKL	Crowne Plaza Auckland	Superior Room			266.00	
—	23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive				
	23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer			89.96	
	23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...			741.49	
	24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise			100.86	
	24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...			2,118.16	
	25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo			218.09	
	25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View			618.82	
	26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)			79.06	
	26 Apr	ROT	Rotorua Museum	Admission To Museum			38.08	
	26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa			53.76	
	26 Apr	ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert			272.61	
BOOKING SUMMARY (NZD)						ACCOUNTS SUMMARY (NZD)		
COST		10,020.84	MARKUP (21.34%)	2,137.96		INVOICES		0.00
RETAIL		12,158.80	COMMISSION (0.00%)	0.00		RECEIPTS		0.00
AGENT		12,158.80	TAX	1,585.93		TO BE INVOICED		12,158.80
AGENT (TAX INCLUSIVE)		12,158.80	MARGIN (17.58%)	2,137.96		TOTAL DUE		0.00

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
 - c. Examine the **Itinerary** on this screen.

All Pax								Insert New Service	
Day/Seq.	Location	Supplier Name	Product Description	Date	Out/Scu	Status	Agent	Voucher No.	
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042	
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043	
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928	
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929	
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930	
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931	
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932	
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933	
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934	
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935	
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936	
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937	
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938	
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939	
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940	
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941	
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942	
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943	
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944	

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. Select menu **FITs > Itinerary > Manage Days**.

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

Insert Days

EXIT SAVE

MODE

☒ INSERT DAYS
 ☐ DELETE DAYS
 ☐ RESEQUENCE DAYS

DAYS TO INSERT

1

BEFORE DAY/SEQ

1 / 10

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

Resequence Days

EXIT SAVE

MODE

☐ INSERT DAYS
 ☐ DELETE DAYS
 ☒ RESEQUENCE DAYS

DAY TO RESEQUENCE

1 - 22-Apr-2025

STARTING SEQUENCE

10

INCREMENT BY

10

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

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

About the Insert/Delete or Resequence Days Fields

Mode

Select an option from either:

- » Insert Days
- » Delete Days
- » Resequence Days

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

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

Insert/Delete Days

Days to Insert/Delete

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

Before/From Day/Seq

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

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

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

Add Into/Drop From Itinerary

If multiple itineraries are used within a booking, a selection to add/drop days can be applied to one or all Itineraries. Use the dropdown itinerary selection list to apply a change to one or all itineraries.

Resequence Days

Day to Resequence

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

Starting Sequence

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

Increment By

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

Recalculate Booking

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

- » *Replace All* – Changes the Booking Header date and all service dates and re-costs all services for the revised travel dates.
- » *All Except Overrides* – As above however does not re-cost services where the original database rates were manually overridden. Manually overridden values need to be confirmed with the 'OK' button.
- » *No Prices* – Recalculates the totals based on the existing service line values.
- » *Update Exchange Rates* – When the Booking services are re-costed should Tourplan continue to use the previous Exchange Rates (unchecked) or use the Exchange Rates from the Tourplan Code Setup module Currency Rates table for the new travel date (checked).

Insert Booking

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

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

The full list is:

1. ["Pickup / Dropoff" on page 93](#)
2. ["Voucher Text" on page 97](#)
3. ["Service Notes" on page 102](#)
4. ["Product Notes" on page 107](#)
5. ["PCM Management FITs" on page 110](#)
6. ["Change Travel Date" on page 113](#)
7. ["Manage Days" on page 116](#)
8. ["Insert Booking" above](#) (this task)

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

- » It can be used as an alternative method of copying a booking, and
- » It can be used to add all services from another booking into the current booking.

Insert a Booking

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Switch to the **Itinerary View** of the booking.
 - a. The default view for a booking is the **Dashboard** view.

NAME	Robson Mr & Mrs K		REFERENCE	USF104568		TRAVEL DATE	22-Apr-2025	
AGENT	SPBBRY - South Pacific & Beyond		CONSULTANT	Geoff		STATUS	Confirmed	
DATE		LOCATION	SUPPLIER	PRODUCT DESCRIPTION			AGENT	
22 Apr		AKL	Hallmark Limousines Ltd	International Airport to City Hotel (Private C...			156.80	
22 Apr		AKL	Crowne Plaza Auckland	Superior Room			266.00	
23 Apr		AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive				
23 Apr		AKL	Supershuttle	Airport to Hotel Shuttle Transfer			89.96	
23 Apr		AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 City & H...			741.49	
24 Apr		AKL	Fullers Group Ltd	Auckland Harbour Cruise			100.86	
24 Apr		AKL	Budget Rent A Car	Group D - Intermediate Automatic - All Inclu...			2,118.16	
25 Apr		WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo			218.09	
25 Apr		ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View			618.82	
26 Apr		ROT	Te Puia Rotorua	Guided Tour (90minutes)			79.06	
26 Apr		ROT	Rotorua Museum	Admission To Museum			38.08	
26 Apr		ROT	Polynesian Spa	Adult Pools & Priest Spa			53.76	
26 Apr		ROT	Tamaki Tours	Tamaki Maori Village - Hangi & Concert			272.61	
BOOKING SUMMARY (NZD)						ACCOUNTS SUMMARY (NZD)		
COST		10,020.84	MARKUP (21.34%)	2,137.96		INVOICES		0.00
RETAIL		12,158.80	COMMISSION (0.00%)	0.00		RECEIPTS		0.00
AGENT		12,158.80	TAX	1,585.93		TO BE INVOICED		12,158.80
AGENT (TAX INCLUSIVE)		12,158.80	MARGIN (17.58%)	2,137.96		TOTAL DUE		0.00

- b. A single service can be opened from the Dashboard by clicking on the service. Alternatively, switch to Itinerary view by selecting, from the **FITs menu**, **FITs > Itinerary**.
- c. Examine the **Itinerary** on this screen.

All Pax								INSERT NEW SERVICE	
DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.	
1/10	AKL	Hallmark Limousines Ltd	International Airport to City H...	22-Apr-2025	1	NB	156.80	103,042	
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	266.00	103,043	
2/10	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	23-Apr-2025	1	NB		102,928	
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	23-Apr-2025	1	NB	89.96	102,929	
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room (Le...	23-Apr-2025	25-Apr-2025		741.49	102,930	
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	100.86	102,931	
3/20	AKL	Budget Rent A Car	Group D - Intermediate Autom...	24-Apr-2025	08-May-2025	NB	2,118.16	102,932	
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	25-Apr-2025	1	NB	218.09	102,933	
4/20	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	25-Apr-2025	27-Apr-2025		618.82	102,934	
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	79.06	102,935	
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	102,936	
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	102,937	
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Hangi &...	26-Apr-2025	1	NB	272.61	102,938	
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,267.63	102,939	
7/10	NAT	Adrift Guided Outdoor Advent...	1 day Guided Tongariro Crossing	28-Apr-2025	1	NB	556.12	102,940	
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		715.59	102,941	
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Prem...	30-Apr-2025	1	NB	280.79	102,942	
9/20	NSN	Grand Mercure Nelson Monaco	Standard Room	30-Apr-2025	01-May-2025		225.14	102,943	
10/10	GMN	Kingsgate Hotel Greymouth	Run of House Room	01-May-2025	02-May-2025		178.56	102,944	

NOTE: The service lines shown in the example Itinerary above cover all services for all pax , however, some services may not apply to some pax. To see which services apply to which pax , click either the drop-down or the left/right arrows in the **All Pax** field at the top of the list.

3. Select menu **FITs > Itinerary > Insert Booking**.
4. On the **Insert Booking** screen, enter details for the new booking and click **Save**.

Insert Booking

EXIT SAVE

SELECT BOOKING TO BE INSERTED

NAME
REFERENCE

INSERT PARAMETERS

INSERT TYPE ☒ INSERT ☐ MERGE

INSERT AT DAY/SEQ /

PAX CONFIGURATION

Double

Robson/Mr/Keith Adult
Robson/Mrs/Mary-Anne Adult

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

About Insert Booking Fields

Name - the name of the booking you want to insert, if you don't know the name of the booking you can use the advance search function by clicking on the magnifying glass.

Reference - the booking reference of the booking to be inserted.

NOTE: Either the booking name or the booking reference field needs to have something displaying for the system to know which booking to insert.

Insert Parameters

- » **Insert** - Renumbers the existing booking service day and sequence numbers if necessary when inserting the Booking. This means that if a booking with 3-days is inserted at (e.g.) Day 4, Sequence 10, then services already in the booking on Day 4 will become Day 7.
- » **Merge** - Does not renumber the existing booking services – instead, the booking services are renumbered to “fit around” the existing booking services. This option may be used, for example, when the accommodation services have been added to a booking and a booking of sightseeing services is to be inserted merging the content of the new booking within the existing booked services.
- » **Pax Configuration** - Pre-selected room types display as per the original booking, room configurations can be amended on booking insert if required.

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

CHAPTER 6

Operations and Accounts

The Operations and Accounts view picks up the remaining menu options related to modifying an existing booking that are not already covered in one of the other FITs menus. Accounts can be invoiced and a Tour Window provides users with a summary of the financial history and profit expectation.

Messages and/or documents can be generated and emailed and/or printed, and internal queued messages can be sent to colleagues.

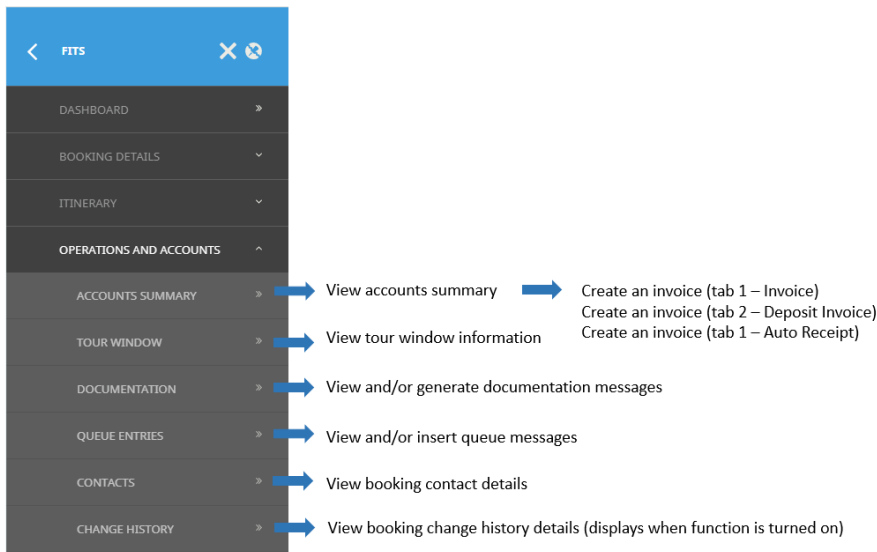
In this chapter ...

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Operations and Accounts Menu

As with changing general booking details or itinerary information, there are several menu options, depending on the type of change needed.

The following graphic shows the FITs **Operations and Accounts** menu matched with corresponding procedures in the FITs User Manual.



Accounts Summary

The Accounts Summary is used to:

- » View payments that have been made against invoices.
- » View value of booking vs value of invoices raised vs value of cash received.
- » Issue invoice(s) to the agent/client for the booking.
- » Apply Credit Notes to invoices that have been issued.

NOTE:

- » A Security setting can be enabled that makes it possible to issue cash receipts at the same time invoice transactions are raised. This receipting procedure is discussed under "[Create an Invoice \(Tab 3 - Auto Receipt\)](#)" on page 130.
- » If the booking status does not allow invoicing, then it will need to be changed to a booking status that does allow invoicing, as discussed in "[General Setup](#)" on page 69.



Any service that has an Optional Service Status (where the setting for **Include in Booking Total** is not set), will not be included in the generation of an invoice.

View Accounts Summary

1. Search for and retrieve a booking to work with. If this hasn't been done already, see "[Retrieve an Existing Quote/Booking](#)" on page 55.
2. Select menu **FITs > Operations and Accounts > Accounts Summary**.
3. View the **Accounts Summary** screen.

Accounts Summary - Example 1 - Booking Totals

The booking has a Quote status, however you can see an overview of booking totals from the Accounts Summary View.

NAME <i>Robson Mr & Mrs K</i>		REFERENCE <i>USFI104568</i>	TRAVEL DATE <i>22-Apr-2025</i>
AGENT <i>SPBBRY - South Pacific & Beyond</i>		CONSULTANT <i>Geoff</i>	STATUS <i>Quotation</i>

BOOKING TOTALS (NZD)					
BOOKING RETAIL	469.84	INVOICES	0.00	TO BE INVOICED	469.84
LESS COMMISSION	0.00	CREDITS	0.00	TOTAL DUE	0.00
AGENT	469.84	RECEIPTS	0.00		

Accounts Summary - Example 2 - Transaction Summary

NAME <i>Robson Mr & Mrs K</i>		REFERENCE <i>USFI104568</i>	TRAVEL DATE <i>22-Apr-2025</i>
AGENT <i>SPBBRY - South Pacific & Beyond</i>		CONSULTANT <i>Geoff</i>	STATUS <i>Confirmed</i>

BOOKING TOTALS (NZD)					
BOOKING RETAIL	12,158.80	INVOICES	12,158.80	TO BE INVOICED	0.00
LESS COMMISSION	0.00	CREDITS	0.00	TOTAL DUE	12,158.80
AGENT	12,158.80	RECEIPTS	0.00		

TRANSACTIONS										INVOICE
AGENT	TRANSACTION DATE	REFERENCE	APPLY	TYPE	CURRENCY	AMOUNT	RATE	BKG. AMOUNT	CREDIT	
SPBBRY	12-Feb-2025	20779	20779	Invoice	NZD	12,158.80	1.0000	12,158.80	CREDIT	

From the Accounts Summary, you can create a new invoice, select an existing invoice and (a) apply a credit note to all or part of it or (b), edit the invoice (provided it is not in a closed accounting period).

4. To create an invoice, click **Invoice**.

INVOICE

5. To edit an existing transaction, click it to open it.



Transactions can only be edited if they are in an open accounting period.



Dependent on system settings, a warning may display advising that the agent's credit limit has been exceeded. Again, dependent on settings, completion of the invoice could be denied. These settings are user company specific.

6. Continue with ["Creating Invoices" on the facing page](#) for detailed steps on creating and viewing invoices.

About the Accounts Summary Fields

Booking Header

NOTE: This section is not shown in the examples.

The Booking Header is the information *above* the Booking Totals section that includes Name, Agent, Reference, Consultant, Travel Date and Status.

Booking Totals

Booking Retail

The retail (cost plus markups, including any agent commission amount) of all itineraries and services in the booking - excluding any "Optional" type services.

Less Commission

The amount of agent commission (if any) which will be deducted from the Booking Retail amount.

Agent

The total amount the booking agent will be invoiced. This figure is Booking Retail less Commission

Invoices

The value of all Invoices issued so far for the booking.

Credits

The value of all Credit Notes issued so far for the booking.

Receipts

The value of Cash Receipts issued so far for the booking.

To Be Invoiced

This figure is any outstanding balance of the booking that needs to be invoiced. The figure is a calculation of the Booking Agent amount less any Invoices/Credits etc that may have been issued.

Total Due

The sum of Invoices, less Credits, less Receipts.

Transactions

Transactions entered against the booking, which can include invoices and receipts, as shown in the examples.

Explanation on column headings can be found in Appendix 1 - [Scroll Column Headings](#)

Creating Invoices

Invoices are generated in the system on a service line-by-service line basis. This has two main benefits:

1. It enables accurate statistical reporting to be obtained showing which agents are selling which product and what margins by agent are being obtained; and
2. It identifies which services have been invoiced. This can be useful when an agent has to be invoiced for a specific service where (e.g.) a deposit has to be paid to the supplier.

NOTE: Because the invoice details are generated internally on a line-by-line basis does not mean that is how they will physically print. Print format is determined by the invoice message template set up.

When the Invoice Details tab is selected, an invoice can be raised for:

- » The total outstanding value of the booking. If previous invoices have been raised, the new invoice will be for the total booking value with an additional "Less Previously Invoiced" line subtracting the value already invoiced.
- » A Deposit Invoice, based on a percentage or amount and for specific service(s) if required.
- » If Auto Receipting has been enabled, a Receipt can be automatically created after the invoice has been generated.



The Transaction Header on the Invoice Tab must be completed for each of the invoice types.

There are three invoicing procedures described in this topic:

1. ["Create an Invoice \(Tab 1 - Invoice\)" below](#)
2. ["Create an Invoice \(Tab 2 - Deposit Invoice\)" on page 129](#)
3. ["Create an Invoice \(Tab 3 - Auto Receipt\)" on page 130](#)



If an Auto Receipt function is required, users will need to have the appropriate security settings enabled to view the Auto Receipt tab.

Create an Invoice (Tab 1 - Invoice)

1. Search for and retrieve a booking to work with. If this hasn't been done already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Select menu **FITs > Operations and Accounts > Accounts Summary**.
3. If there are any transactions in the list, provided they are in an open accounting period, they can be edited by clicking the **transaction**.

Edit Invoice

PRINT
INSERT
DELETE
EXIT
SAVE

REFERENCE
20779
CURRENCY
NZD - New Zealand Dollars
TRANSACTION DATE
12-Feb-2025
CURRENCY SUBCODE
Standard
PAYMENT DUE DATE
23-Mar-2025

ITEM DESCRIPTION	QUANTITY 1	QUANTITY 2	UNIT PRICE	EXTENDED TOTAL
Hallmark Limousines Ltd	1	1	156.80	156.80
Crowne Plaza Auckland	1	1	266.00	266.00
Our Own Office - Christchurch	2	1	5,804.66	11,609.32

AUDIT

INVOICE TOTAL
12,032.12
LESS COMMISSION
0.00
SUB-TOTAL
12,032.12
TAX AMOUNT
1,569.41
INVOICE TOTAL
12,032.12

NOTE: To change anything on the Edit Invoice screen, click one of the *Item Description* lines to display the Invoice Line screen, and make your changes there.

4. To create a new invoice, click **Invoice**.

INVOICE

5. On the Insert Invoice screen (**Invoice tab**), click **OK** to view the invoice detail.

Insert Invoice EXIT OK

INVOICE **DEPOSIT INVOICE** **AUTO RECEIPT**

AGENT: SPBBRY - South Pacific & Beyond

REFERENCE: 20797

TRANSACTION DATE: 01-Sep-2024

CURRENCY: NZD - New Zealand Dollars

CURRENCY SUBCODE: Standard

PAYMENT DUE DATE: 23-Mar-2025

BRANCH: Unassigned

DEPARTMENT: Unassigned

ACCOUNT:

INVOICE LINE GENERATION

GENERATE INVOICE LINES: ☒

CONSOLIDATE LINKED PCMS: ☐

INVOICE BY SELL CURRENCY: ☐

6. On the detailed **Insert Invoice** screen:

Insert Invoice PRINT INSERT DELETE EXIT SAVE

REFERENCE: 20797

TRANSACTION DATE: 01-Sep-2024

PAYMENT DUE DATE: 23-Mar-2025

CURRENCY: NZD - New Zealand Dollars

CURRENCY SUBCODE: Standard

ITEM DESCRIPTION	QUANTITY 1	QUANTITY 2	UNIT PRICE	EXTENDED TOTAL
Hallmark Limousines Ltd	1	1	156.80	156.80
Crowne Plaza Auckland	1	1	266.00	266.00
Our Own Office - Christchurch	2	1	5,868.00	11,736.00
Less Previously Invoiced	1	1	-12,032.12	-12,032.12

INVOICE TOTAL: 126.68

LESS COMMISSION: 0.00

SUB-TOTAL: 126.68

TAX AMOUNT: 16.55

INVOICE TOTAL: 126.68

- a. If there are no further entries required for this invoice, check that all values are correct and click **Save** to output the invoice transaction.

SAVE

- b. To edit a line, double-click it.

NOTE: It is possible to use the **Insert** button to insert a new invoice line, however this is more likely to be used when a "manual" type of invoice is being issued.

INSERT

- c. On the **Invoice Line** screen, edit fields if necessary and click **OK**.

Invoice Line DELETE EXIT OK

TRANSACTION ITEM		DEBIT POSTING	
ITEM DESCRIPTION	Crowne Plaza Auckland Superior Room	BRANCH	BS - Balance Sheet
		DEPARTMENT	AD - Administration
		ACCOUNT	050000 Debtors Control

FCU QTY	SCU QTY	UNIT PRICE	EXTENDED TOTAL
1.00	1.00	266.00	266.00
	COMMISSION %	0.00	0.00
		NETT	266.00
		TAX	34.70
		ITEM TOTAL	266.00

CREDIT POSTING	
BRANCH	US - USA Office
DEPARTMENT	FI - FIT
ACCOUNT	010000 Sales - FIT

NOTE: Debit and Credit positing are automated and should not be changed.

- d. Click **Save** to output the invoice transaction.

7. On the **Output Invoice** screen

- a. Select an appropriate **booking status** from the drop-down field *Set Booking Status To* and click **OK**.

Output Invoice EXIT OK

SET BOOKING STATUS TO KK - Confirmed

GENERATE DOCUMENT ☐

- b. To email or generate a document, select **Generate Document** and an appropriate Document Format from the drop-down field and click **OK**.

Output Invoice EXIT OK

SET BOOKING STATUS TO KK - Confirmed

GENERATE DOCUMENT ☒

DOCUMENT FORMAT

8. If the Review & Send Document screen appears, there are several options available - choose one:
 - » Click *Exit* to return to Accounts Summary. The invoice now appears in the Transactions list.
 - » Click *Download* to save a local copy of the invoice document as a PDF file.
 - » Email the invoice document by selecting the *Sent Details* tab, entering email address information and clicking *Email*.

Create an Invoice (Tab 2 - Deposit Invoice)

1. Search for and retrieve a booking to work with. If this hasn't been done already, see "[Retrieve an Existing Quote/Booking](#)" on page 55.
2. Select menu **FITs > Operations and Accounts > Accounts Summary**.
3. On the Insert Invoice screen, complete the transaction header details, then click the **Deposit Invoice** tab to view the invoice detail. Select how the Deposit Invoice is to be generated (**by percentage** or **by amount**), and enter the value. Tag the services the invoice is to apply the deposit amount for and click *Ok*.

Insert Invoice EXIT OK

INVOICE **DEPOSIT INVOICE** AUTO RECEIPT

☒ BY PERCENTAGE 20.00
☐ BY AMOUNT 0.00

BOOKING RETAIL 12,158.80 TAGGED RETAIL 12,250.64
 LESS COMMISSION 0.00 LESS COMMISSION 0.00
 AGENT 12,158.80 AGENT 12,250.64

	DAY/SEQ.	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	DATE	STATUS	PC	SUPPLIER CONF.	VOUCHER NO.
<input checked="" type="checkbox"/>	1/10	AKL	HMLA01	International Airport to City Hot...	22-Apr-2025	NB			103,042
<input checked="" type="checkbox"/>	1/20	AKL	CRPA01	Superior Room	22-Apr-2025	KK			103,043
<input checked="" type="checkbox"/>	2/10	AKL	OOC01	14 Day All NZ Self Drive	23-Apr-2025	NB			102,928
<input checked="" type="checkbox"/>	5/20	ROT	RMUR01	Admission To Museum	26-Apr-2025	OP			102,936
<input checked="" type="checkbox"/>	5/30	ROT	POSR01	Adult Pools & Priest Spa	26-Apr-2025	OP			102,937

4. On the **Output Invoice** screen, select an appropriate booking status from the drop-down field *Set Booking Status To*, choose whether or not to generate a document (including specifying the document format) and click **OK**.

Output Invoice EXIT OK

SET BOOKING STATUS TO DP - Deposit Invoice
 GENERATE DOCUMENT ☒
 DOCUMENT FORMAT INVD - Invoice Detail

5. If the Review & Send Document screen appears, there are several options available - choose one:
- » Click *Exit* to return to Accounts Summary. The invoice now appears in the Transactions list.
 - » Click *Download* to save a local copy of the invoice document as a PDF file.
 - » Email the invoice document by selecting the *Sent Details* tab, entering email address information and clicking *Email*.

Create an Invoice (Tab 3 - Auto Receipt)

- Search for and retrieve a booking to work with. If this hasn't been done already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
- Switch to the Accounts Summary view of the booking (see ["Accounts Summary" on page 125](#)).
- On the Insert Invoice screen, complete the transaction header details, and then click the **Auto Receipt** tab.

Insert Invoice EXIT OK

INVOICE DEPOSIT INVOICE **AUTO RECEIPT**

☐ NO RECEIPT
☒ RECEIPT INVOICE IN FULL
☐ RECEIPT SPECIFIC AMOUNT

RECEIPTED AMOUNT

RECEIPT TYPE

BANK

BRANCH

ACCOUNT

ADD FEE

DESCRIPTION	AMOUNT

NOTE: If an Auto Receipt invoice is being generated, the invoice creation does not begin until the receipt header details have been completed and the **OK** button clicked.

4. On the detailed **Insert Invoice** screen:

Insert Invoice PRINT INSERT DELETE EXIT SAVE

REFERENCE: 20799 CURRENCY: NZD - New Zealand Dollars
 TRANSACTION DATE: 01-Sep-2024 CURRENCY SUBCODE: Standard
 PAYMENT DUE DATE: 23-Mar-2025

ITEM DESCRIPTION	QUANTITY 1	QUANTITY 2	UNIT PRICE	EXTENDED TOTAL
Hallmark Limousines Ltd	1	1	156.80	156.80
Crowne Plaza Auckland	1	1	266.00	266.00
Our Own Office - Christchurch	2	1	5,868.00	11,736.00
Less Previously Invoiced	1	1	-12,158.80	-12,158.80

INVOICE TOTAL: 0.00 LESS COMMISSION: 0.00
 SUB-TOTAL: 0.00
 TAX AMOUNT: 0.00
 INVOICE TOTAL: 0.00

- a. If there are no further entries required for this invoice, check that all values are correct and click **Save** to output the invoice transaction.

SAVE

- b. To edit a line, double-click it.

NOTE: It is possible to use the **Insert** button to insert a new invoice line, however this is more likely to be used when a "manual" type of invoice is being issued.

INSERT

- c. On the **Invoice Line** screen, edit fields if necessary and click **OK**.

Invoice Line DELETE EXIT OK

TRANSACTION ITEM

ITEM DESCRIPTION: Crowne Plaza Auckland
 Superior Room

FCU QTY	SCU QTY	UNIT PRICE	EXTENDED TOTAL
1.00	1.00	266.00	266.00
	COMMISSION %	0.00	0.00
	NETT	266.00	266.00
	TAX	34.70	34.70
	ITEM TOTAL	266.00	266.00

DEBIT POSTING

BRANCH: BS - Balance Sheet
 DEPARTMENT: AD - Administration
 ACCOUNT: 050000 Debtors Control

CREDIT POSTING

BRANCH: US - USA Office
 DEPARTMENT: FI - FIT
 ACCOUNT: 010000 Sales - FIT

NOTE: The Credit Posting section will have the General Ledger account in it that the credit side of the transaction will be posted to. This will be the default Revenue Account as set up in the General Ledger INI settings. This account detail should not be altered - if the incorrect account is chosen, cross ledger postings could result which will cause difficulty in reconciling.

- d. Click **Save** to output the invoice transaction.
5. On the Output Invoice screen, select an appropriate booking status from the drop-down field *Set Booking Status To*, choose whether or not to generate a document (including specifying the document format) and click **OK**.
6. If the Review & Send Document screen appears, there are several options available - choose one:
- » Click *Exit* to return to Accounts Summary. The invoice now appears in the Transactions list.
 - » Click *Download* to save a local copy of the invoice document as a PDF file.
 - » Email the invoice document by selecting the *Sent Details* tab, entering email address information and clicking *Email*.

About the Insert Invoice Fields

Insert Invoice Screen (Tab 1 - Invoice)

When **OK** is clicked on the Invoice tab, Tourplan raises an invoice for either the total value of the booking or, if previous invoices have been raised, the difference between the amount already invoiced and the booking value.

Agent

Accept the Agent defaulted from the Booking Header. If necessary, an invoice can be issued to a different agent by selecting the agent from the drop-down list.

NOTE: It is possible to issue multiple invoices for a booking to different agents/clients by changing the agent code in this field.

Reference

This invoice number is automatically generated by Tourplan. A system setting will normally dictate that the invoice number cannot be changed.

Transaction Date

This is the Transaction Date and determines the Transaction Period. The default date here will depend on an accounting INI setting. The default transaction date could be either today's date, the booking travel date, the date of the last service in the booking or a date based on the current accounting period. The default date can be overridden if a different date is required on the invoice. The transaction date cannot be in a closed accounting period.

Currency

The invoice currency defaulted from the booking Header. This may be changed for the invoice if required. Only currencies that are attached to the agent are available. (Also see 'Invoice By Sell Currency' in the table below.)

Currency Subcode

This will default to the currency sub code from the booking header. (See discussion under Agent Currencies, Booking Currencies, Service Currencies & Invoice Currency.)

Payment Due Date

Defaulted from the standard payment terms set up for this Agent. This may be overridden. In this example the payment due terms are 60 days prior to travel.

Branch, Department & Account

Unless instructed otherwise, these should be left blank as these values are automatically set based on the booking reference branch & department values.

Invoice Line Generation

Generate Invoice Lines

Create individual lines for each invoice inserted (the default option).

Consolidate Linked PCMs

If the Booking has Linked PCMs in it, this checkbox will become active. Checking this box will show the total of a linked PCM as one invoice line as opposed to a line for each service in the PCM.

Invoice By Sell Currency

In addition to being able to invoice in any currency that is attached to the agent, ticking this checkbox will invoice only those services whose sell currency matches the currency selected from the currency drop-down above. If (e.g.) there are services in the booking whose sell currency is USD and the booking currency is NZD, then selecting USD from the currency drop-down and ticking this checkbox will only invoice those services with USD as the sell currency.

Insert Invoice Screen (Tab 2 - Deposit Invoice)

When the Deposit Invoice tab is selected, a deposit invoice can be generated using either a percentage amount or a value amount. In both cases, the amounts will be pro-rated across the services that are tagged in the Deposit Invoice screen. Those services that have a status that *excludes* the costs from the total (e.g., Optional services) will not be included in the invoice calculation.

Insert Invoice Screen (Tab 3 - Auto Receipt)

Some user companies have a need to receipt an invoice as soon as it is issued – an example being when payment by credit card is being processed when the invoice is raised.

NOTE: Standard receipting cannot be done here - that has to be done in the Debtors application.

Receipt Invoice In Full

When this radio button is selected, the full amount of the invoice about to be generated will be receipted

Receipt Specific Amount

Selecting this radio button will allow a specific amount to be entered into the Receipted Amount field. This amount will be prorated across all invoice lines.

Receipt Type

Select the required Receipt Type from the dropdown. The receipt type determines which system bank account the receipt will be credited to.

Receipt Text 1 - 3

There are three user defined text fields against each Receipt Type. These can have labels set up for them when the receipt type is defined. The labels will display here once a receipt type is selected. Common use of receipt type text are labels for "Bank", "Branch" and "Account" or "Card Type", "Card Number", "Card Expiry".

Add Fee Button

If there is a bank charge associated with the receipt - e.g., foreign exchange transaction fee - clicking this button will allow selection of an additional Receipt Type to allow the fee to be posted to the correct expense account.

Bank Fees

DELETE

EXIT

OK

RECEIPT TYPE

FEE AMOUNT

Tour Window

This is the second of six tasks described in this user manual for viewing or changing the following:

- » Information about accounts, invoices and the tour window
- » Operations details, including documentation, messaging and contacts

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

The full list is:

1. "Accounts Summary" on page 125
2. "Tour Window" above (this task)
3. "Documentation" on page 138
4. "FIT Queue Entries" on page 149
5. "Contacts" on page 153
6. "Change History" on page 154

The Tour Window provides a number of views that summarise transactions over the entire booking. There are currently four views available, accessed from menu *FITs > Operations and Accounts > Tour Window*.

Tabs on the screen allow selection of a particular transaction view.

View Tour Window Information

1. Search for and retrieve a booking to work with. If this hasn't been done already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Select menu **FITs > Operations and Accounts > Tour Window**.
3. The Summary Tab will open, the other tabs available are:

a. Summary

SUMMARY	AR TRANSACTIONS	AP TRANSACTIONS	VOUCHERS																																
<table> <tr> <th colspan="2">BOOKING PROFIT SUMMARY (NZD)</th><th colspan="2">CURRENT PROFIT EXPECTATION (NZD)</th></tr> <tr> <td>BOOKING COST</td><td>8,713.77</td><td>BOOKING COST</td><td>8,713.77</td></tr> <tr> <td>PLUS MARKUP (21.34%)</td><td>1,859.10</td><td>VOUCHER UNDER/OVER</td><td>0.00</td></tr> <tr> <td>RETAIL</td><td>10,572.87</td><td>BOOKING REVENUE</td><td>10,572.87</td></tr> <tr> <td>LESS COMMISSION (0%)</td><td>0.00</td><td>PROFIT VALUE</td><td>1,859.10</td></tr> <tr> <td>AGENT VALUE</td><td>10,572.87</td><td>PROFIT PERCENTAGE</td><td>21.34</td></tr> <tr> <td>MARGIN PERCENTAGE</td><td>17.58</td><td>MARGIN PERCENTAGE</td><td>17.58</td></tr> </table>				BOOKING PROFIT SUMMARY (NZD)		CURRENT PROFIT EXPECTATION (NZD)		BOOKING COST	8,713.77	BOOKING COST	8,713.77	PLUS MARKUP (21.34%)	1,859.10	VOUCHER UNDER/OVER	0.00	RETAIL	10,572.87	BOOKING REVENUE	10,572.87	LESS COMMISSION (0%)	0.00	PROFIT VALUE	1,859.10	AGENT VALUE	10,572.87	PROFIT PERCENTAGE	21.34	MARGIN PERCENTAGE	17.58	MARGIN PERCENTAGE	17.58				
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DEBTORS SUMMARY (NZD)		CREDITORS SUMMARY (NZD)																																	
INVOICES	10,572.87	INVOICES	0.00																																
CREDITS	0.00	CREDITS	0.00																																
CURRENT REVENUE	10,572.87	CURRENT EXPENSES	0.00																																
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CASH DUE	10,572.87	CASH OWED	0.00																																
TO BE INVOICED	0.00	OUTSTANDING VOUCHERS	4,520.10																																
TOTAL OUTSTANDING	10,572.87	TOTAL OUTSTANDING	4,520.10																																
<div>TAX</div> <div> <input type="radio"/> TAX INCLUSIVE <input checked="" type="radio"/> TAX EXCLUSIVE </div>																																			

NOTE: Summary totals can be displayed with or without tax - simply click the relevant Tax radio button (*Tax Inclusive* or *Tax Exclusive*).

b. AR Transactions (Accounts Receivable)

Summary									
Summary	AR Transactions	AP Transactions	Vouchers						
Agent	Date	Reference	Apply	Type	Currency	Trans Amount	Rate	Booking Amount	
SPBBRY	12-Feb-2025	20779	20779	Invoice	NZD	10,462.71	1.0000	10,462.71	
SPBBRY	01-Sep-2024	20798	20798	Invoice	NZD	110.16	1.0000	110.16	
Total									10,572.87

c. AP Transactions (Accounts Payable)

SUMMARY	AR TRANSACTIONS		AP TRANSACTIONS		VOUCHERS					
SUPPLIER	DATE	REFERENCE	APPLY	TYPE	CURRENCY	TRANS AMOUNT	VOUCHER NO.	RATE	BOOKING AMOUNT	
KGHG01	04-May-2025	15253	15253	Invoice	NZD	126.96	102,944	1.0000	126.96	
DFGF01	06-May-2025	33363	33363	Invoice	NZD	288.70	102,946	1.0000	288.70	
SKCA01	30-Apr-2025	37367	37367	Invoice	NZD	530.43	102,930	1.0000	530.43	
STMZ01	10-May-2025	44883	44883	Invoice	NZD	1,145.22	102,947	1.0000	1,145.22	
CRPA01	29-Apr-2025	4944004	4944004	Invoice	NZD	182.12	103,498	1.0000	182.12	
TEPR01	30-Apr-2025	55995	55995	Invoice	NZD	56.52	102,935	1.0000	56.52	
AGON01	30-Apr-2025	576	576	Invoice	NZD	397.39	102,940	1.0000	397.39	
APGF01	06-May-2025	5875	5875	Invoice	NZD	216.52	102,945	1.0000	216.52	
GMMN01	03-May-2025	5885959	5885959	Invoice	NZD	119.13	102,943	1.0000	119.13	
FULA01	28-Apr-2025	58950	58950	Invoice	NZD	72.09	102,931	1.0000	72.09	
TAMR01	29-Apr-2025	5896	5896	Invoice	NZD	194.78	102,938	1.0000	194.78	
CAHC01	10-May-2025	59589	59589	Invoice	NZD	217.39	102,949	1.0000	217.39	
BUDN01	10-May-2025	67857484	67857484	Invoice	NZD	1,508.69	102,932	1.0000	1,508.69	
ILW01	30-Apr-2025	680056	680056	Invoice	NZD	200.00	102,942	1.0000	200.00	
NOVR01	29-Apr-2025	746894	746894	Invoice	NZD	441.74	102,934	1.0000	441.74	
HOIW01	30-Apr-2025	78954	78954	Invoice	NZD	511.30	102,941	1.0000	511.30	

d. Vouchers

SUMMARYAR TRANSACTIONSAP TRANSACTIONSVOUCHERS

CURRENCY

BASE (NZD)BOOKING (NZD)SERVICE

VOUCHER	DATE	SUPPLIER	CURRENCY	RATE	EXPECTED COST	VOUCHERED COST	ACTUAL COST	OUTSTANDING	VOUCHER STATUS	UNDER/OVER
103,042	22-Apr-2025	HMLA01	NZD	1.0000	136.35	0.00	0.00	0.00	Not Printed	0.00
103,043	22-Apr-2025	CRPA01	NZD	1.0000	191.86	191.86	0.00	191.86	Not Printed	0.00
102,928	23-Apr-2025	OIOC01	NZD	1.0000	0.00	0.00	0.00	0.00	Not Printed	0.00
102,929	23-Apr-2025	SUSA01	NZD	1.0000	64.28	0.00	0.00	0.00	Not Printed	0.00
102,930	23-Apr-2025	SKCA01	NZD	1.0000	529.81	529.81	0.00	529.81	Not Printed	0.00
102,931	24-Apr-2025	FULA01	NZD	1.0000	72.07	0.00	0.00	0.00	Not Printed	0.00
102,932	24-Apr-2025	BUDN01	NZD	1.0000	1,513.46	0.00	0.00	0.00	Not Printed	0.00
102,933	25-Apr-2025	WGCW01	NZD	1.0000	155.83	0.00	0.00	0.00	Not Printed	0.00
102,934	25-Apr-2025	NOVR01	NZD	1.0000	442.16	442.16	0.00	442.16	Not Printed	0.00
102,935	26-Apr-2025	TEPR01	NZD	1.0000	56.49	0.00	0.00	0.00	Not Printed	0.00
102,936	26-Apr-2025	RMUR01	NZD	1.0000	33.11	0.00	0.00	0.00	Not Printed	0.00
102,937	26-Apr-2025	POSR01	NZD	1.0000	46.75	0.00	0.00	0.00	Not Printed	0.00
102,938	26-Apr-2025	TAMR01	NZD	1.0000	194.78	0.00	0.00	0.00	Not Printed	0.00
102,939	27-Apr-2025	CTHW01	NZD	1.0000	905.74	905.74	0.00	905.74	Not Printed	0.00
102,940	28-Apr-2025	AGON01	NZD	1.0000	397.36	0.00	0.00	0.00	Not Printed	0.00

NOTE: There are three options for choosing a currency in which to list Voucher transactions - simply click the relevant Currency radio button (*Base*, *Booking* or *Service*):

- » *Base* currency is the currency that final accounting is done in - normally the currency of the user company's country.
- » *Booking* currency is the currency that is in the Booking Header (Booking Details screen).
- » *Service* currency is cost currency of the service in the product database. When Service Currency is selected, the Total row does not display. This is because the service currencies may not be consistent, so a total would be irrelevant.

Profit Summary Fields

Booking Profit Summary Fields

Booking Cost

The booking vouchered value. The amount expected to be paid to suppliers.

Plus Markup

The amount that has been added at either database and/or booking level to obtain the retail value. The mark-up amount expressed as a percentage of costs displays to the right of the screen label.

Retail

The sum of Booking Cost plus Mark-up equals Retail.

Less Commission

The amount of agents commission (if applicable) that the agent may be given. The commission amount displayed as a percentage of retail displays to the right of the screen label.

Agent Value

The sum of Booking Cost plus Mark-up less Commission. This is the amount expected to be collected from the agent.

Margin Percentage

Profit expressed as a percentage of revenue (Agent Value).

Current Profit Expectation

Booking Cost

The booking vouchered value. The amount expected to be paid to suppliers.

Voucher Under/Over

The sum of any underpayments or overpayments of vouchers. Voucher Unders/Overs will only occur when there is a discrepancy between the creditors invoice value and the voucher value and the voucher is closed when the invoice is processed.

Profit Value

Booking Revenue minus Booking Cost minus Voucher Under/Over.

Profit Percentage

Profit expressed as a percentage of costs (Booking Cost + Voucher Over/Under).

Margin Percentage

Profit expressed as a percentage of revenue (Booking Revenue).

Debtors Summary

Invoices

The sum of all debtors' invoices raised against the booking.

Credits

The total of all debtors' credit notes raised against the booking.

Current Revenue

The sum of Invoices less Credits.

Receipts

The total of all debtors' cash receipts issued against any invoice raised in the booking.

Cash Due

The sum of Current Revenue less Receipts.

To Be Invoiced

The sum of Agent less Current Revenue.

Total Outstanding

The sum of Agent Value less Receipts.

Creditors Summary

Invoices

The total of creditors' invoices for the booking.

Credits

The total of creditors' credit notes for the booking.

Current Expenses

The sum of Invoices less Credits.

Cheques

The total of creditors' cheques issued against creditor invoices entered for the booking.

Cash Owed

The sum of Current Expenses less Cheques.

Outstanding Vouchers

The following sum is performed on any vouchers which are not closed: Voucher value less Creditor Invoice (s) less Creditor Credit Note(s).

Total Outstanding

The sum of Outstanding Vouchers plus Cash Owed.

For more information about column headings refer to the Appendices - [Tour Window Column Headings](#)

Documentation

This is the third of six tasks described in this user manual for viewing or changing the following:

- » Information about accounts, invoices and the tour window
- » Operations details, including documentation, messaging and contacts

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

The full list is:

1. ["Accounts Summary" on page 125](#)
2. ["Tour Window" on page 134](#)
3. ["Documentation" above \(this task\)](#)
4. ["FIT Queue Entries" on page 149](#)
5. ["Contacts" on page 153](#)
6. ["Change History" on page 154](#)

The Documentation screen is where you generate, download and send documentation messages.

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

The message will be saved in the generated message list, where it can be viewed or re-generated.

Agent Message Generation

Agent messages are documents such as quotations and confirmation letters which can be generated from your booking and in most cases can be sent to your agents via email.

Generate an Agent Documentation Messages

1. Search for and retrieve a booking to work with. If you haven't done this already, see "[Retrieve an Existing Quote/Booking](#)" on page 55
2. Select menu **FITs > Operations and Accounts > Documentation**.
3. To generate a new message, click **Generate Message**.

GENERATE MESSAGE

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

5. Click **OK** to keep the changes and save or update the entry.
6. Click **Exit** to discard any changes.
7. The sending Tab will open if the Email and Sending tabs were activated when the message template was setup to send as an email. The **Email and Sending** tabs allow you to view the email text that will be sent and the contact name and address the email is sending to.

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

AGENT	TYPE	CONTACT NAME	CONTACT DETAIL
TO	South Pacific & Beyon...	All	Accounts Email: naomi.johns@pa.tourplan.com
CC	All		Email:
BCC	All		Email:

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

For the Attention of:

Please find attached confirmation advice for Robson Mr & Mrs K.

Best regards
Naomi Johns

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



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

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

Review & Send Document [EXIT] [EMAIL]

DOCUMENT REFERENCE: BAG-SPBBRY-USF1104568-ABCT-2022-08-24-21-40-2 [DOWNLOAD]

[DOCUMENT] [EMAIL] [SENDING] [ATTACHMENTS]

Format | Font | Size | **B** *I* U A- | [Icons] | Source

Booking Confirmation For: Robson Mr & Mrs K
Travelling On: 22 Apr 25

To: South Pacific & Beyond
 From: Naomi Johns
 Date: 23 Feb 25 21:40:24

I am pleased to confirm the following booking.
 Let me know if you have any queries or require any alterations to be made to the details below. We look forward to welcoming your clients to New Zealand.

Date of Travel: 22 Apr 25
 No. of people: 2 adults, 0 child(ren), 0 infant(s)
 Our Reference: USF1104568
 Your Reference:
 Total Price: NZD 12,158.80

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

Review & Send Document [EXIT] [EMAIL]

DOCUMENT REFERENCE: BAG-SPBBRY-USF1104568-ABCT-2022-08-24-21-40-2 [DOWNLOAD]

[DOCUMENT] [EMAIL] [SENDING] [ATTACHMENTS]

ATTACHMENTS [ADD]

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

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



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

The message will be saved in the generated message list, where it can be viewed or re-generated.

View and/or Re-Generate Documentation Messages

- Search for and retrieve a booking to work with. If you haven't done this already, see "[Retrieve an Existing Quote/Booking](#)" on page 55.
- Select menu **FITs > Operations and Accounts > Documentation**.

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

— DOCUMENT FILTER

SUPPLIER

DATE FROM

DATE TO

ADDRESSED TO

SENT BY

MESSAGE TYPE

ALL

BOOKING AGENT MESSAGE

BOOKING SUPPLIER MESSAGE

INVOICE MESSAGE

VOUCHER MESSAGE

MESSAGE STATUS

ALL

FILED

GENERATED

PRINTED

SENT

UPLOADED

OK

CLEAR

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

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

DATE	MESSAGE	STATUS	SENT TO	SENT BY
23-Feb-2025 12:05:11	SBRQ	Generated		
23-Feb-2025 12:05:10	SBRQ	Generated		
12-Feb-2025 10:32:30	ABCT	Generated		
12-Feb-2025 09:40:24	ABCT	Uploaded		
12-Feb-2025 09:37:03	ABCT	Generated		
01-Feb-2025 14:38:01	ABCC	Generated		

BOOKING SUPPLIER MESSAGE

VIEW DOCUMENT

RESEND

SUPPLIER	HMLA01 - Hallmark Limousine		
DAY/SEQ.	1/10	VOUCHER	103,042
PRODUCT CODE	INTHOT		
DESCRIPTION	International Airport to City Ho		
TEMPLATE	Supplier Request		
LANGUAGE	Unassigned		

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

[VIEW DOCUMENT](#)

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

[EDIT DOCUMENT](#)

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

EXIT EMAIL

DOCUMENT REFERENCE BSP-USF1104568-CRPA01-103043-SBRQ-2022-08-25

DOCUMENT |
 EMAIL |
 SENDING |
 ATTACHMENTS

Normal (DIV) | Font | Size | B I U A | [Icons] | Source

NEW BOOKING REQUEST

To: [Crown](#)e Plaza Auckland

From: ABC Tours – Reservations

Date: 23 Feb 25

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

Booking Name:	Robson Mr & Mrs K
Our Reference:	USF1104568
Room Basis:	Superior Room
Pax:	2 adults, 0 child(ren), 0 infant(s)
Date(s):	In: Tuesday 22 Apr 2025 Out: Wednesday 23 Apr 2025 1 Night
Rooms:	1 Double
Pax Names:	Mr Keith Robson (Adult)

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

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

Inserting a Manual Contact

A list of available contacts will show in the sending tab when messages are formatted to send by email. There may be occasions where a different email address is to be used to send the message to. The Manual Contact Email field is found in the Review and Send Document Screen within the Sending tab.

Select the Search to open the Contacts screen.

Review & Send Document
EXIT EMAIL

DOCUMENT REFERENCE BAG-SPBBRY-USFI104568-ABCT-2022-08-24-21-40-2
DOWNLOAD

DOCUMENT EMAIL **SENDING** ATTACHMENTS

SUBJECT Booking Confirmation - USFI104568 / Robson Mr & Mrs K

- AGENT CONTACTS

	AGENT	TYPE	CONTACT NAME	CONTACT DETAIL
TO	South Pacific & Beyon...	All	Accounts Q	Email: naomi.johns@pa.tourplan.com
CC		All	 Q	Email:
BCC		All	 Q	Email:

Check the Manual Contact check box and type the email address in the field provided.

Contacts
EXIT ADD

☒ **MANUAL CONTACT**

EMAIL

SELECT CONTACTS

	NAME	EMAIL	MOBILE	PHONE	FAX	WEB
-	AC -					
<input type="checkbox"/>	Accounts	theiremailaddress@theiremail.com		0014185698245		
+	FR -					

Document Filters

Filtering functions are available when searching for previously sent or generated messages within the Documentation message history. Large bookings may have a lengthy message history and document filters allow users to easily locate historical messages previously sent. Filter options include; particular message types, message statuses or perhaps who the message may have been addressed to or sent from.

Searching For Messages Using Message Filters

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#)
2. Select menu **FITs > Operations and Accounts > Documentation**.
3. Click the + Document Filter heading to expand the filter options.
4. Complete the required filter fields.
5. Click **Ok** to apply the search filter.
6. Click **Clear** to clear the search filter.

Document Filter Fields

Supplier

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

Date From / To

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

Addressed To

The filtered results will return for the email address.

Booking/PCMName

The name of the booking or PCM.

Sent By

The name of the Tourplan User who sent the message.

Message Type

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

Options available include; All, Agent Statement Messages, Booking Agent Messages, Debtor Receipt Messages, General Agent Messages, Invoice Messages.

Options available include; All, Booking Supplier Messages, Cheque Messages, General Supplier Messages, and/or Remittance Messages.

Options available include: Booking Agent Messages, Booking Supplier Messages, Invoice Messages, and/or Voucher Messages.

Message Status

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

Supplier Message Generation

Supplier messages can be generated from your booking and sent to your suppliers, supplier messages could include:

- » Supplier request messages
- » Supplier amendment messages
- » Cancellation messages

Generate a Supplier Documentation Message

1. Search for and retrieve a booking to work with. If you haven't done this already, see "[Retrieve an Existing Quote/Booking](#)" on page 55
2. Select menu **FITs > Operations and Accounts > Documentation**.
3. To generate a new message, click **Generate Message**.

GENERATE MESSAGE

4. In the **New Document** screen select a Document Type.

EXIT
OK

New Document

DOCUMENT TYPE

DOCUMENT FORMAT

Booking Agent Message

Booking Agent Message

Booking Supplier Message

Booking XML Message

Voucher Message

5. A full list of services will display, select a *Document Format*, and how the services within the message are to consolidate and the order they are to display in the message.

EXIT
OK

New Document

DOCUMENT TYPE

DOCUMENT FORMAT

Booking Supplier Message

CONSOLIDATE SERVICES BY

Supplier

ORDER SERVICES BY

Service Date

SERVICE LINE FILTERS

☐ SHOW OPTIONAL SERVICES

UPDATE SERVICE STATUS

☐ UPDATE STATUS

Unassigned

SERVICE TYPE

☒ ALL

☒ ACTIVITY

☒ ENTRANCE FEE

☒ PACKAGE

☒ SIGHTSEEING/DAY TOUR

☒ TRANSPORT

☒ ACCOMMODATION

☒ CRUISE

☒ MEAL

☒ RENTAL VEHICLE

☒ TRANSFER

SERVICE STATUS

☒ BLANK

☒ NOT BOOKED

☒ CONFIRMED

DAY/SEQ.	DATE	SUPPLIER NAME	DESCRIPTION	SERVICE
<input checked="" type="checkbox"/> 1/10	22-Apr-2025	Hallmark Limousines Ltd	International Airport to City ...	TF
<input checked="" type="checkbox"/> 1/20	22-Apr-2025	Crowne Plaza Auckland	Superior Room	AC
<input checked="" type="checkbox"/> 2/10	23-Apr-2025	Our Own Office - Christchurch	14 Day All NZ Self Drive	PK
<input checked="" type="checkbox"/> 2/20	23-Apr-2025	Supershuttle	Airport to Hotel Shuttle Tran...	TF
<input checked="" type="checkbox"/> 2/30	23-Apr-2025	Skycity Hotel	Deluxe Harbourview Room (...)	AC
<input checked="" type="checkbox"/> 3/10	24-Apr-2025	Fullers Group Ltd	Auckland Harbour Cruise	CR
<input checked="" type="checkbox"/> 3/20	24-Apr-2025	Budget Rent A Car	Group D - Intermediate Auto...	RV
<input checked="" type="checkbox"/> 4/10	25-Apr-2025	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Co...	EF
<input checked="" type="checkbox"/> 4/20	25-Apr-2025	Novotel Rotorua Lakeside H...	Superior Room Lake View	AC
<input checked="" type="checkbox"/> 5/10	26-Apr-2025	Te Pua Rotorua	Guided Tour (90minutes)	EF
<input checked="" type="checkbox"/> 5/40	26-Apr-2025	Tamaki Tours	Tamaki Maori Village - Hangi...	ME
<input checked="" type="checkbox"/> 6/10	27-Apr-2025	Chateau Tongariro Hotel	Executive Spa Suite	AC
<input checked="" type="checkbox"/> 7/10	28-Apr-2025	Adrift Guided Outdoor Adve...	1 day Guided Tongariro Cros...	SS
<input checked="" type="checkbox"/> 8/20	29-Apr-2025	Hotel Intercontinental	Deluxe Room	AC
<input checked="" type="checkbox"/> 9/10	30-Apr-2025	The Interisland Line	Wellington/Picton Ferry - Pr...	TR
<input checked="" type="checkbox"/> 9/20	30-Apr-2025	Grand Mercure Nelson Mon...	Standard Room	AC
<input checked="" type="checkbox"/> 10/10	01-May-2025	Kingsgate Hotel Greymouth	Run of House Room	AC

NOTE: Service line filter selections are available on the left of the screen. Users can select specific service types and/or service statuses to filter their message sending. There is also the option to update the status of the service.

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

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7. Click **Exit** to discard any changes.
8. On the Review & Send Document screen, a list of services will show on the left of the screen you can examine the generated document, download it (using the green **Download** button) or email (using the blue **Email** button).

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

9. Email and sending tabs are activated if the message template is setup to send as an email. The Email and Sending tabs allow you to view the email text that will be sent and the contact name and address the email is sending to.

NOTE: A contact will default from the coding in the message template, however an alternative contact name can be selected using the drop down arrow.

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



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

View and/or Re-Generate Documentation Messages

1. Search for and retrieve a booking to work with. If you haven't done this already, see "[Retrieve an Existing Quote/Booking](#)" on page 55.
2. Select menu **FITs > Operations and Accounts > Documentation**.

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

A screenshot of the "DOCUMENT FILTER" interface. It includes sections for "SUPPLIER", "DATE FROM", "DATE TO", "ADDRESSED TO", and "SENT BY", each with a dropdown menu. There are also sections for "MESSAGE TYPE" (ALL, BOOKING AGENT MESSAGE, BOOKING SUPPLIER MESSAGE, INVOICE MESSAGE, VOUCHER MESSAGE) and "MESSAGE STATUS" (ALL, FILED, GENERATED, PRINTED, SENT, UPLOADED). At the top right are "OK" and "CLEAR" buttons.

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

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

DATE	MESSAGE	STATUS	SENT TO	SENT BY
23-Feb-2025 12:05:11	SBRQ	Generated		
23-Feb-2025 12:05:10	SBRQ	Generated		
12-Feb-2025 10:32:30	ABCT	Generated		
12-Feb-2025 09:40:24	ABCT	Uploaded		
12-Feb-2025 09:37:03	ABCT	Generated		
01-Feb-2025 14:38:01	ABCC	Generated		

BOOKING SUPPLIER MESSAGE

VIEW DOCUMENT

RESEND

SUPPLIER

HMLA01 - Hallmark Limousine

DAY/SEQ.1/10VOUCHER103,042

PRODUCT CODEINTHOT

DESCRIPTIONInternational Airport to City Ho

TEMPLATE

Supplier Request

LANGUAGE

Unassigned

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



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



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

Review & Send Document EXIT EMAIL

DOCUMENT REFERENCE BSP-USF1104568-CRPA01-103043-SBRQ-2022-08-25 DOWNLOAD

DOCUMENT EMAIL SENDING ATTACHMENTS

Normal (DIV) Font Size B I U A

NEW BOOKING REQUEST

To: [Crowne Plaza Auckland](#)
 From: ABC Tours – Reservations
 Date: 23 Feb 25

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

Booking Name: Robson Mr & Mrs K
Our Reference: [USF1104568](#)

Room Basis: Superior Room

Pax: 2 adults, 0 child(ren), 0 infant(s)

Date(s): In: Tuesday 22 Apr 2025 Out: Wednesday 23 Apr 2025
 1 Night

Rooms: 1 Double

Pax Names:
 Mr Keith Robson (Adult)

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

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

Document Filter Fields

Supplier

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

Date From / To

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

Addressed To

The filtered results will return for the email address.

Booking/PCMName

The name of the booking or PCM.

Sent By

The name of the Tourplan User who sent the message.

Message Type

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

Options available include; All, Agent Statement Messages, Booking Agent Messages, Debtor Receipt Messages, General Agent Messages, Invoice Messages.

Options available include; All, Booking Supplier Messages, Cheque Messages, General Supplier Messages, and/or Remittance Messages.

Options available include: Booking Agent Messages, Booking Supplier Messages, Invoice Messages, and/or Voucher Messages.

Message Status

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

FIT Queue Entries

This is the fourth of six tasks described in this user manual for viewing or changing the following:

- » Information about accounts, invoices and the tour window
- » Operations details, including documentation, messaging and contacts

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

The full list is:

1. ["Accounts Summary" on page 125](#)
2. ["Tour Window" on page 134](#)
3. ["Documentation" on page 138](#)
4. ["FIT Queue Entries" above](#) (this task)
5. ["Contacts" on page 153](#)
6. ["Change History" on page 154](#)

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

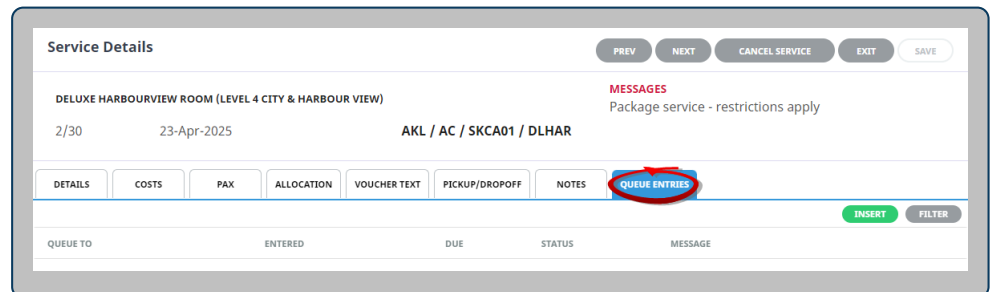
NOTE: The setup of Message Queues are covered in the [System Setup User Manual](#).

A filter button is also available for searching previously sent Queued Message. When selected users will have the option to filter by who sent or received the message, the dates the message was due to be sent, the agent or supplier the message was sent to and you can even select the status of the message (Queued, Pending, Actioned or Archived). Open the following link to see the link for more on the Filter Queue Items selections.

A queued message can be sent via the Itinerary Service - sending a queued message about a specific service, or from the Operation Menu - Queue Message generating a message about the whole booking.

View and/or Insert Queue Messages

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. There are two locations that Queue Entries can be inserted, the first is from the Operations and Accounts menu (a booking level message).
 - a. Select menu **FITs > Operations and Accounts > Queue Entries**.
 - b. On the **Queue Entries** screen, examine the list of queue messages, if any.
3. The second is from the Itinerary Menu, when a service is selected (a service level queued message).
 - a. Switch to the **Itinerary View** of the booking via menu **FIT > Itinerary**.
 - b. Select the **service** to send a Queue Entry for. This opens the *Service Details* screen, click on the Queue Entries Tab.



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



5. On the **Queue Message** screen, enter message details. Refer to ["About the Queue Message Fields" below](#) for information on each of the fields on the Queue Message screen.

In this example the Queue Message entry is accessed from the Service Queue Entries tab populating the service line information.

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

SAVE

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

For this example, the queue entry was accessed from the Operations Menu > Queue Messages inserting a (booking) Queue Message of Final Payment is required (with an Assigned To value of *Accounts Department*) this message now appears in the list of queue entries for this booking:

Queue Management - Manual Selection

PRINT COPY FILTER SAVE FILTER DELETE EXIT PROCESS

QUEUE	PCM	ANALYSIS	BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
<input type="checkbox"/>	QUEUE TO	ASSIGNED TO	SENT BY	ENTERED	DUE	STATUS	MESSAGE
<input type="checkbox"/>	Accounts De...	Accounts De...	PA-NAOMIJO...	25-Aug-2022 13:...	25-Feb-2025 00:00	Queued	Final payment is required
<input type="checkbox"/>	Accounts De...	Dan Martin	PA-NAOMIJO...	25-Aug-2022 13:...	25-Feb-2025 00:00	Queued	Final payment is required

SELECT ALL UNSELECT ALL

MESSAGE DETAILS

STATUS

The following example has limited filters applied, the content of the message will be visible in the Message Details section. To view click on a Queue Entry line.

Queue Management - Manual Selection

PRINT COPY FILTER SAVE FILTER DELETE EXIT PROCESS

QUEUE	PCM	ANALYSIS	BOOKING	ANALYSIS	SERVICE	ANALYSIS	RESULTS
<input type="checkbox"/>	QUEUE TO	ASSIGNED TO	SENT BY	ENTERED	DUE	STATUS	MESSAGE
<input type="checkbox"/>	PA-NAOMIJO...	PA-NAOMIJO...	PA-GEOFFBE...	23-Jan-2025 14:3...	23-Jan-2025 00:00	Queued	Message received and ret
<input type="checkbox"/>	PA-NAOMIJO...	PA-NAOMIJO...	PA-GEOFFBE...	23-Jan-2025 14:5...	23-Jan-2025 15:00	Pending	Another test queue mess
<input type="checkbox"/>	Accounts De...	Accounts De...	PA-NAOMIJO...	25-Aug-2022 13:...	25-Feb-2025 00:00	Queued	Final payment is required
<input type="checkbox"/>	Accounts De...	Dan Martin	PA-NAOMIJO...	25-Aug-2022 13:...	25-Feb-2025 00:00	Queued	Final payment is required
<input type="checkbox"/>	PA-STEVEDO...	PA-STEVEDO...	PA-STEVEDO...	02-Mar-2025 06:...	02-Mar-2025 06:...	Queued	Please queue this service
<input type="checkbox"/>	Domestic Tic...	Domestic Tic...	PA-STEVEDO...	02-Jul-2025 15:0...	02-Jul-2025 00:00	Queued	Possible roof maintenanc

SELECT ALL UNSELECT ALL

MESSAGE DETAILS

STATUS

About the Queue Message Fields

Sent By

Queue entry sent by user name.

Queue Defaults

The code and name for any defaults selected; e.g. TKTS Ticketing. Queue defaults are pre inserted text that can be selected to make sending of frequently used messages quicker. A good example of this could be TKTS - Ticketing Queue Defaults, when selected.

Queue To

Queue name (if used).

Assigned To

User or Group queue is assigned to.

Booking Name

Booking name, if you have the booking open and have used the FITs menu selection to select Queue Entries the booking name will automatically display in this field. The booking name displays from the Header of the booking, not the pax names from within the booking.

Service Line

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

PCM Name

Name of PCM if queue relates to a PCM.

PCM Service Line

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

Queue Defaults

The code and name for any defaults selected; e.g. TKTS Ticketing. Queue defaults are pre inserted text that can be selected to make sending of frequently used messages quicker. A good example of this could be TKTS - Ticketing Queue Defaults, when selected.

Agent

Booking agent code and name.

Supplier

Service supplier code and name.

Due Date Time

Queue due date and time, this can be set to a specific date and time, or will default to the date and time of the system.

If a Queue Default has been selected the due date may default. In some cases message Queue Defaults will have been set up to have a reminder due date set. The system will send a notification reminder to the members of the Queue Destination depending on the setting defaulted. It may be so many days from today, number of days from service, number of days from travel date or a manual date. If a reminder due date has been pre-defined then the message due date will not be editable.

Message

Message text, this is a free format field. If a queue default has been selected, the text of the queue default will display in this field. Text can be added to if necessary.

Filtering & Searching for Previously Sent Messages

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

Filter Queue Items RESET EXIT OK

SHOW MESSAGES THAT HAVE BEEN:

SENT BY

QUEUE DEFAULTS

DUE FROM 07-Sep-2022 00:00

DUE TO 31-Dec-2049 00:00

AGENT

SUPPLIER

NAME Robson Mr & Mrs K

PCM NAME

MESSAGE STATUS

☒ QUEUED ☒ PENDING ☐ ACTIONED ☐ ARCHIVED

Filter Queue Items Fields

Sent To

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

Sent By

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

Queue Defaults

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

Due From/To

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

Agent

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

Supplier

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

Name and PCM Name

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

Message Status

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

Contacts

This is the last of six tasks described in this user manual for viewing or changing the following:

- » Information about accounts, invoices and the tour window
- » Operations details, including documentation, messaging and contacts

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

The full list is:

1. ["Accounts Summary" on page 125](#)
2. ["Tour Window" on page 134](#)
3. ["Documentation" on page 138](#)
4. ["FIT Queue Entries" on page 149](#)
5. ["Contacts" above](#) (this task)
6. ["Change History" on the next page](#)

The Contacts screen displays all contacts for a booking.

View Booking Contact Details

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Select menu **FITs > Operations and Accounts > Contacts**.
3. On the **contact details** screen (left-hand side), select a service line under **Supplier/Agent Name** and expand the relevant section on the right-hand side.

SUPPLIER/AGENT NAME	CODE
South Pacific & Beyond	SPBBRY
Hallmark Limousines Ltd	HMLA01
Crowne Plaza Auckland	CRPA01
Our Own Office - Christchurch	OOOC01
Supershuttle	SUSA01
Skycity Hotel	SKCA01
Fullers Group Ltd	FULA01
Budget Rent A Car	BUDN01
Waltomo Glow Worm Caves	WGCW01
Novotel Rotorua Lakeside Hotel	NOVR01
Te Pula Rotorua	TEPR01
Rotorua Museum	RMUR01
Polynesian Spa	POSR01
Tamaki Tours	TAMR01
Chateau Tongariro Hotel	CTHW01
Adrift Guided Outdoor Adventures	AGON01
Hotel Intercontinental	HOIW01
The Interisland Line	IILW01

AGENT'S DETAILS

AGENT: SPBBRY - South Pacific & Beyond

STREET ADDRESS 1: 167 East 7th Street

STREET ADDRESS 2: Culver City

CITY: Los Angeles

STATE/PROVINCE: California

COUNTRY: USA

POST CODE: 90232

+ ACCOUNTS

+ ROBERT

In the example above, the line selected on the left-hand side is **South Pacific & Beyond**. This is the Agent Name, a full list of South Pacific & Beyonds contacts are available on the right-hand side and can be expanded. Highlighting further Suppliers from the list on the left will enable viewing of attached contact details for each supplier.

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



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

Change History

This is an additional task which can be enabled and would become the sixth task available in the Operations and Accounts Menu. The procedure described in this document allows users to view:

- » A Change History user interface itemising various changes which have happened within the booking.
- » Further service drill-down are available to show:
 - » The Tourplan User who made the change
 - » The time the change was made
 - » Old and new values per service for (Cost, Sell, Retail and Agent amounts)

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

The full list is:

1. ["Accounts Summary" on page 125](#)
2. ["Tour Window" on page 134](#)
3. ["Documentation" on page 138](#)
4. ["FIT Queue Entries" on page 149](#)
5. ["Change History" above](#) (this task)

View Change History

1. Search for and retrieve a booking to work with. If you haven't done this already, see ["Retrieve an Existing Quote/Booking" on page 55](#).
2. Select menu **FITs > Operations and Accounts > Change History**.
3. On the **Change History** screen, examine the list of changes from the table.

NOTE: Changes will display in date order most recent first.

+ FILTER								
+ CHANGED AT	USER	REFERENCE	STATUS	AGENT	COST	SELL	RETAIL	AGENT ACTION
07-Sep-2022 14:29:14	PA-NAOMIJOHNS	USF1104678	QU	SPBBRY	425.84	471.48	471.48	471.48 Current Booking State
+ 07-Sep-2022 14:29:08	PA-NAOMIJOHNS	USF1104678	QU	SPBBRY	425.84	471.48	471.48	471.48 Booking Totals
+ 07-Sep-2022 14:19:34	PA-NAOMIJOHNS	USF1104678	QU	SPBBRY	428.84	475.10	475.10	475.10 Booking Totals

4. To view specific change data, click on the **action line** to drill-down further.

+ FILTER

+ CHANGED AT	USER	REFERENCE	STATUS	AGENT	COST	SELL	RETAIL	AGENT ACTION		
07-Sep-2025 14:29:14	PA-NAOMIJOHNS	USF1104678	QU	SPBBRY	425.84	471.48	471.48	471.48 Current Booking State		
- 07-Sep-2025 14:29:08	PA-NAOMIJOHNS	USF1104678	QU	SPBBRY	425.84	471.48	471.48	471.48 Booking Totals		
VOUCHER	TRAVEL DATE	DAY/SEQ	SUPPLIER	PRODUCT	STATUS	PAX	SCU	COST	AGENT ACTION	ROOMS
103,675	22-Apr-2025	1/20	CRPA01	ROH	IS	2 AD	1	222.00	267.64 Service Updated	1 DB
+ 07-Sep-2025 14:19:34	PA-NAOMIJOHNS	USF1104678	QU	SPBBRY	428.84	475.10	475.10	475.10	475.10 Booking Totals	

5. The **Change Details** screen will open, the header of the screen identifies the; consultant; date and time the change was made. A list of services will display in the column to the left of the screen.

NOTE: The default view on initial entry will be the Booking Totals view. Change actions per service are available when individual service dates are selected.

Change Details		EXIT	
CHANGED AT	07-Sep-2022 14:29:08	CHANGED BY	PA-NAOMIJOHNS
BOOKING TOTALS		CHANGED ONLY	
1/20 22-APR-2025	CHANGED	DATA ITEM	NEW VALUE
	<input checked="" type="checkbox"/>	ACTION	Service Updated
	<input checked="" type="checkbox"/>	CHANGED AT	07-Sep-2022 14:29:08
	<input checked="" type="checkbox"/>	COST	222.00
	<input checked="" type="checkbox"/>	COST TAX	28.96
	<input checked="" type="checkbox"/>	SELL	267.64
	<input checked="" type="checkbox"/>	SELL TAX	34.91
	<input checked="" type="checkbox"/>	RETAIL	267.64
	<input checked="" type="checkbox"/>	RETAIL TAX	34.91
	<input checked="" type="checkbox"/>	AGENT	267.64
	<input checked="" type="checkbox"/>	AGENT TAX	34.91
		OLD VALUE	Service Created
			07-Sep-2022 14:19:34
			225.00
			29.35
			271.26
			35.38
			271.26
			35.38
			271.26
			35.38

- Click **Exit** to Exit the Change Details View.
- Click **Exit** to Exit the Change History.

About the Change History Fields

On entry a full list dates and times as to when the booking was amended are provided and the user who made the change. The reference number of the booking, the status, cost, sell, retail and agent amounts can be viewed. The final column is the action of the change.

If more than one change occurred further actions are available per service. When the + button is selected a full list of changes performed by the user is available.

Clicking on a service will provide users with a more detailed explanation for the change.

Booking Totals

The Booking Totals view allows users to see the booking changes for the entire booking. Changed Data Items are identified and listed in a table showing the new and old values for the booking.

Service Change History

Opening a specific change action will display further details of the changes per service.

New Value / Old Value

For each service drill-down opened, users will be able to see the value of the service prior to the change and the service value after the change was made.

Change Details are recorded for the following actions:

Action	Definition
Booking Created	When the booking was created.
Service Created	Records when the service was created.
Current Booking State	Records the status / state of the booking.
Booking Updated	Records when a booking has been updated.
Service Updated	Records the service line details which have been updated.
Booking Totals	Records when booking values have been updated.
Booking Deleted	Records if a booking was deleted.
Service Deleted	Records if a service was deleted.

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APPENDIX

Supporting Information

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

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Appendix 1 - Scroll Column Headings

Change Default Column Headings

1. Click anywhere in the white space of a list's column headings.

For example, retrieve a booking and, on the Dashboard, click the white space between column headings *Supplier* and *Product Description* in the list of services returned:

NAME

Robson Mr & Mrs K

AGENT

SPBBRY - South Pacific & Beyond

REFERENCE

USF1104568

CONSULTANT

Geoff

TRAVEL DATE

22-Apr-2025

STATUS

Quotation

All Pax

▼

▶

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to City Hot...	22-Apr-2025	1	IS	156.80	103,665
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	IS	266.00	103,675

2. On the **Set Column Defaults** screen, check a column heading label to make it visible (and uncheck to hide it). You can also use the *Highlighted?* check boxes to make a column bold, and specify the width of columns.

For example, check Cost under *Visible?* and also under *Highlighted?* to display that column with bold font in the list:

Set Column Defaults

EXIT

RESET

SAVE

AVAILABLE COLUMNS

COLUMN

Local Supplier

Markup %

Markup

Margin

Margin %

>

<

>

<

TABLE COLUMNS

COLUMN	HIGHLIGHTED?	WIDTH
Date	<input type="checkbox"/>	75
Location	<input type="checkbox"/>	50
Supplier	<input checked="" type="checkbox"/>	150
Product Description	<input type="checkbox"/>	150
Cost	<input type="checkbox"/>	110
Agent	<input type="checkbox"/>	110
Comm %	<input type="checkbox"/>	90
Commission Amount	<input type="checkbox"/>	110
Retail	<input type="checkbox"/>	70

WRAP IN WIDE COLUMNS

☐

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

SAVE

4. The list is immediately updated to reflect the new defaults chosen.

The updated services list now shows an additional *Cost* column and displays it with bold font (no other defaults changed):

NAME

Robson Mr & Mrs K

AGENT

SPBBRY - South Pacific & Beyond

REFERENCE

USFT104568

CONSULTANT

Geoff

TRAVEL DATE

22-Apr-2025

STATUS

Invoiced

All Pax

▼

INSERT NEW SERVICE

DAY/SEQ.	LOCATION	SUPPLIER NAME	PRODUCT DESCRIPTION	DATE	OUT/SCU	STATUS	COST	AGENT	VOUCHER NO.
1/10	AKL	Hallmark Limousines Ltd	International Airport to Cit...	22-Apr-2025	1	NB	156.80	156.80	103,042
1/20	AKL	Crowne Plaza Auckland	Superior Room	22-Apr-2025	23-Apr-2025	KK	220.64	266.00	103,043
2/10	AKL	Our Own Office - Christchur...	14 Day All NZ Self Drive	23-Apr-2025	1	NB			102,928
2/20	AKL	Supershuttle	Airport to Hotel Shuttle Tra...	23-Apr-2025	1	NB	73.92	89.96	102,929
2/30	AKL	Skycity Hotel	Deluxe Harbourview Room ...	23-Apr-2025	25-Apr-2025		609.28	741.49	102,930
3/10	AKL	Fullers Group Ltd	Auckland Harbour Cruise	24-Apr-2025	1	NB	82.88	100.86	102,931
3/20	AKL	Budget Rent A Car	Group D - Intermediate Aut...	24-Apr-2025	08-May-2025	NB	1,740.48	2,118.16	102,932
4/10	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Co...	25-Apr-2025	1	NB	179.20	218.09	102,933
4/20	ROT	Novotel Rotorua Lakeside H...	Superior Room Lake View	25-Apr-2025	27-Apr-2025		508.48	618.82	102,934
5/10	ROT	Te Puia Rotorua	Guided Tour (90minutes)	26-Apr-2025	1	NB	64.96	79.06	102,935
5/20	ROT	Rotorua Museum	Admission To Museum	26-Apr-2025	1	OP	38.08	38.08	102,936
5/30	ROT	Polynesian Spa	Adult Pools & Priest Spa	26-Apr-2025	1	OP	53.76	53.76	102,937
5/40	ROT	Tamaki Tours	Tamaki Maori Village - Han...	26-Apr-2025	1	NB	224.00	272.61	102,938
6/10	WHP	Chateau Tongariro Hotel	Executive Spa Suite	27-Apr-2025	29-Apr-2025		1,041.60	1,267.63	102,939
7/10	NAT	Adrift Guided Outdoor Adve...	1 day Guided Tongariro Cro...	28-Apr-2025	1	NB	456.96	556.12	102,940
8/20	WLG	Hotel Intercontinental	Deluxe Room	29-Apr-2025	30-Apr-2025		588.00	715.59	102,941
9/10	WLG	The Interisland Line	Wellington/Picton Ferry - Pr...	30-Apr-2025	1	NB	230.72	280.79	102,942
9/20	NSN	Grand Mercure Nelson Mon...	Standard Room	30-Apr-2025	01-May-2025		185.00	225.14	102,943
10/10	GMN	Kiwiata Hotel Greymouth	Bus of House Room	01-May-	02-May-		146.72	178.56	102,944

FIT Booking Dashboard Columns

* indicates a column in the default view. To change default column headings, see "[Change Default Column Headings](#)" on the previous page.

Bookings and Quotes > FITs > Dashboard

Column Heading	Description
* Date	The service date.
* Location	Service location code.
* Supplier	The service supplier name.
Local Supplier	The service supplier local name (if field is used)
* Product Description	Service (i.e. product) full description.
Date	Date of service.
* Out/SCU	Service "check out" date for service or number of second charge units.
* Status	Service status.
Cost	The service line cost applied to the booking.
Markup %	Markup as a percentage.
Markup	Markup currency value.
Retail	Retail value - cost plus markups.
Comm %	Commission as a percentage.
Commission Amount	Commission currency value.
* Agent	Agent price – cost plus mark-ups less commission.
Margin \$	Margin value of the service as a currency value.
Margin %	Margin value of the service as a percentage.

FIT Booking Itinerary Columns

* indicates a column in the default view. To change default column headings, see "[Change Default Column Headings](#)" on the previous page.

Bookings and Quotes > FITs > Itinerary

Column Heading	Description
* Day/Seq	Day and sequence of service.
* Location	Service location code.
Location Name	Service location description.
Supplier	The service supplier code.
* Supplier Name	The service supplier full name.
Local Supplier Name	An alternative name for service suppliers local name.
Service	The service code.
Product Code	The service (i.e. product) code.
* Product Description	Service (i.e. product) full description.
Product Comment	Comments added to the service.
* Date	The date of the service.
Day	The day of the service.
* Out/SCU	Service out date (accommodation) or number of second charge units (non accommodation).
* Status	Service status.
PC	Price Code.
Remarks	The remarks field from the Pickup/Drop Off screen.
Supplier Conf.	Supplier Confirmation field in the booking service line.
* Voucher No.	Voucher number.
Voucher Status	Voucher status.
Notes	A flag (i.e. check-box) to indicate if notes have been added to the service.
Cost	The service cost price.
Sell	The service sell price.
Markup %	Markup as a percentage.
Markup	Markup currency value.
Retail	Retail value - cost plus markups.
Comm %	Commission as a percentage.
Commission Amount	Commission currency value.
* Agent	Agent price – cost plus mark-ups less commission.
Margin \$	Margin value of the service as a currency value.
Margin %	Margin value of the service as a percentage.
Override	A flag (i.e. check-box) to indicate if the costs have been over-ridden.
Rate Name	Product database Date Range/Details Screen rate name.
Rate Name 2	Product database Date Range/Details Screen rate name 2. A second field to display an additional/alternative rate name.
Rate Text	Product database Date Range/Details Screen rate text.
Rate Text 2	Product database Date Range/Details Screen rate text 2. A second field to display an additional/alternative rate text.

Column Heading	Description
Rate Status	The status description of the rate from the product database. The standard definitions are: <ul style="list-style-type: none"> » Confirmed » Provisional » Terminal » Closed » Manual
Assigned	A flag (i.e. check-box) to indicate if Driver/Vehicle/Guide assignments have been made for the service.
Disc/Mup Seq	Sequence number of the Discount/Markup matrix record applied to the service.
Disc/Mup Code	Code of the Discount/Markup matrix record applied to the service.
Comm Seq	Sequence number of the Commission matrix record applied to the service.
Comm Code	Code of the Commission matrix record applied to the service.
ESI Name	External service adapter name.
ESI Description	External service adapter description.
PCM Link	A flag (i.e. check-box) to indicate if the services of a copied in PCM are still linked to the PCM.
Linked PCM Name	The names of any PCMs inserted into the booking that are retaining the link to the PCM pricing.
Linked PCM Name Alias	An alternative PCM name field of any PCMs inserted into the booking that are retaining the link to the PCM pricing.
Package PCM Name	The name of any Package PCMs inserted into the booking.
Package PCM Name Alias	An alternative PCM name of any Package PCMs inserted into the booking.
Last Worked Date	Date the service line was last worked on.
Last Worked By	Last worked by user name.

Service Line Insert (Service Scroll Headings)

* indicates a column in the default view. To change default column headings, see ["Change Default Column Headings" on page 158](#).

Bookings and Quotes > FITs > Itinerary Insert Service - Results Tab

Column Heading	Description
Source	Where the rate is sourced from - Internal rate (or External rate if Supplier connectivity is operational).
Location	Service location code.
Location Name	Service location name.
Local Supplier Name	Local supplier full name.
Locality	The locality of the service.
*Service	The service code.
*Service Name	Service (i.e. product) full description.
Supplier	The service supplier code.
*Supplier Name	The service supplier full name.

Column Heading	Description
Code	Supplier code. Descriptive hyperlinks will open tabs for you to browse descriptive information.
*Description	Drill down link to view more information (Supplier amenities/ Service amenities, Rate information including age policies and room capacity, Allocation information, and Supplier or Product Notes). Descriptive hyperlinks will open tabs for you to browse descriptive information.
*Comment	Comment field of the service (if used).
Class	The class of the service.
Rate Name	The rate name of service rate period. (2 field columns)
Rate Text	The rate text of service rate period. (2 field columns)
Availability	Availability of the service, on request or OK (confirmed availability).
Price Code	The price code of the service.
Price Code Description	The description of the price code for this service.
Cost	The service cost price.
*Retail	Retail value - cost plus markups. (includes booking, itinerary or pax range markup, or product discount/markup form the DCM.
*Agent	Agent price – cost plus mark-ups less commission.
Min SCU	Minimum second charge units (e.g. minimum nights stay).

Tour Window Columns

* indicates a column in the default view. To change default column headings, see ["Change Default Column Headings" on page 158](#).

Bookings and Quotes > FITs > Operations and Accounts > Tour Window (AR Transactions tab)

Column Heading	Description
* Agent	The code of the agent the transaction has been issued against.
* Date	The transaction date.
* Reference	The transaction reference.
* Apply	The transaction apply reference. In the case of credit notes and receipts, this is the invoice reference that the credit note or receipt applies to.
* Type	The transaction type (Invoice; Credit Note; Receipt).
* Currency	Transaction currency.
* Trans Amount	The transaction amount in transaction currency.
* Rate	The exchange rate used in the transaction.
* Booking Amount	The transaction amount in booking currency.

Bookings and Quotes > FITs > Operations and Accounts > Tour Window (AP Transactions tab)

Column Heading	Description
* Supplier	The supplier the transaction has been issued against.
* Date	The transaction date.
* Reference	The transaction reference.
* Apply	The transaction apply reference. In the case of credit notes and receipts, this is the invoice reference that the credit note or receipt applies to.
* Type	The transaction type (Invoice; Credit Note; Cheque).
* Currency	Transaction currency.
* Trans Amount	The transaction amount in transaction currency.
* Voucher No.	The voucher number of the service.
Due Date	The transaction due date.
* Rate	The exchange rate used in the transaction.
* Booking Amount	The transaction amount in booking currency.

Bookings and Quotes > FITs > Operations and Accounts > Tour Window (Vouchers tab)

Column Heading	Description
* Voucher	The voucher number.
* Date	The service date.
* Supplier	The service supplier.
* Currency	The service line currency.
* Rate	The service line exchange rate between Service Line currency and Booking currency.
* Expected Cost	The normal service line cost without a voucher.
* Vouchered Cost	The service line amount actually vouchered.
* Actual Cost	The service line cost applied to the booking.
Invoiced	Amount invoiced.
Credited	Voucher amount credited.

Column Heading	Description
Paid	Amount paid.
* Outstanding	Any unpaid amount of an unclosed voucher.
* Voucher Status	The voucher status.
* Under/Over	The difference between the Vouchered value and the Invoice value.
Voucher Closed	The date the Voucher was closed.

Mark Up / Commission Columns

Column Heading	Description
* Date	The date of the service.
Day/Seq	Day and sequence of service.
* Location	Service location code.
* Product Description	Service (i.e. product) full description.
* Cost	The sum of the 'Cost' values for each of the services in the Booking from the product database.
* (Cost) Markup	The amount of any Booking Markup (markup applied in the Markups/Commissions Screen).
* (Cost) Markup%	An on-screen percentage calculation (i.e. not stored in the system) of the difference between Cost and Retail.
* Retail	The sum of the cost price plus all types of markup (database markup and Booking markup).
* (Retail) Comm	The value of any agent commission (commission being paid to the debt-or/agent attached to the Booking), which is deducted from the retail price.
* (Retail) Comm %	An on-screen calculation (i.e. not stored in the system) of the Commission value expressed as a percentage of the Retail total.
* Agent	The sum of Retail less Commission = the price the agent/debtor will pay.
Margin	The value added to the cost after Agent Commission has been applied.
Margin %	An on-screen calculation of the Margin value expressed as a percentage.
Supplier Name	The service supplier full name.
Service	The service code.
(Product) Code	The service (i.e. product) code.
* Product Description	Service (i.e. product) full description.

Communications Columns

* indicates a column in the default view. To change default column headings, see "[Change Default Column Headings](#)" on page 158.

Bookings and Quotes > FITs > Operations and Accounts > Documentation

Column Heading	Description
* Date	Date and time message generated.
* Message	Message or document text.
* Status	Current status of the message or document.
* Sent To	Recipient of the message or document.
* Sent By	User name that generated the message.

Bookings and Quotes > FITs > Operations and Accounts > Queue Entries

Column Heading	Description
* Queue To	User or Group queue the message was assigned to.
* Entered	Date message entered.
* Due	Message due date.
* Status	Message status.
* Message	Message text.
Booking	Booking Name.
Ref	Booking Reference.
Travel Date	Travel Date of Booking.
Booking Consultant	Booking Consultant Initials.
Booking Consultant Name	Booking Consultant Name.
Voucher	Voucher Number.
Service Date	Service Line Service Date.
PCM Name	PCM Name.
PCM Consultant	PCM Consultant Initial.
PCM Consultant Name	PCM Consultant Name.
PCM Service Line	PCM Service Line.
Agent Code	Booking Agent Code.
Agent	Booking Agent Name.
Supplier Code	Supplier Code.
Supplier	Supplier Name.
Def. Code	Queue Definition Code.
Def. Name	Queue Definition Name.
Scope	Queue Scope. (Agent, Booking, Booking Service Line, General, PCM, PCM Service Line, Supplier or User).

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