

Tourplan NX Course Notes

Create & Maintain an FIT Booking

Create an FIT Booking

Session Code: FIT101

Edition 1



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CHAPTER 1

Getting Started with FIT Bookings and Quotes

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 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.



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

Notes:

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 "[About the Tourplan-NX Menu](#)" on page 7 and the landing page header at the top, which indicates the current menu (always **Home** for the landing page) and the currently logged-in user.

Landing Page Sections

The screenshot displays the Tourplan-NX Landing Page. The interface is divided into three main sections: Header, Menu, and Body (4 Sections).

Header: Includes the 'Home' label, a user profile icon, and the text 'logged in as PA-NAOMIJOHNS'.

Menu: A vertical sidebar on the left containing various navigation options: MENU, QUICK LINKS, FITS, DEBTORS, CODE SETUP, BOOKINGS AND QUOTES, OPERATIONS, FINANCIALS, PRODUCTIONS, REPORTS, and SYSTEM.

Body (4 Sections): The main content area is divided into four sections:

- Recently Worked On:** A table with columns: BOOKING NAME, REFERENCE, TRAVEL DATE. It lists bookings for Quiggley and Herbert Mr & Mrs J.
- Travelling Soon:** A table with columns: BOOKING NAME, REFERENCE, TRAVEL DATE. It lists bookings for Quiggley and Herbert Mr & Mrs J.
- My Messages:** A table with columns: MESSAGE, REFERENCE, SENT BY, DUE, ENTERED. It lists messages received and sent by PA-GEOFFBEAVER.
- Useful Links:** A section with a link to 'myTourplan'.

Notes:

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 companys 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.

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.

Notes:

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.

A Useful Link can be removed from the Code Setup application. If the user no longer wants the URL to display. 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.

Notes:

Logging Out

The correct procedure to follow when logging out is to return to the landing page and use the log out button. 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 users licence to allow another users' to log in.

Logging out

1. From the **landing page** select the blue drop down arrow.
2. The logout screen will show, select **Logout**.

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

About the Logout Screen

Settings

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

Notes:

About the Tourplan-NX Menu

The Hamburger Menu

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



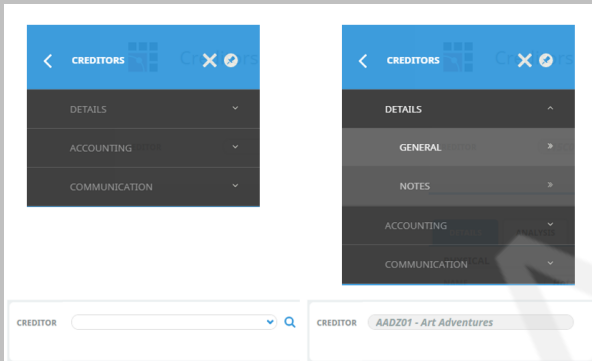
Selections available from the hamburger menu can change, depending on context within the system; i.e. which application is currently running (examples of applications are Financials, FITs, Code Setup etc.).

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: Creditors Menu

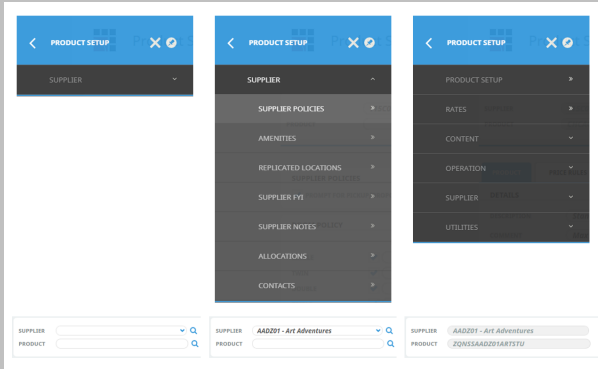
Creditors menu (a) *before* and (b) *after* a Creditor is chosen from the Creditors screen:



Notes:

Example: Product Setup Menu

Product Setup menu (a) *before* choosing anything, (b) *after* choosing a *Supplier* and (c) *after* choosing both *Supplier and Product*.



Notes:

Menu Breadcrumb Trails

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

1. Click the **Home** menu to expand it:
2. Click the **System** menu option to expand it:
3. Click **Code Setup** to go to the Code Setup menu:

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.

CHAPTER 2

Your First Booking

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 on [Create an FIT Booking](#).

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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	USFI104568	TRAVEL DATE	22-Apr-2019
AGENT	SPBBRY - South Pacific & Beyond	CONSULTANT	Geoff	STATUS	Invoiced

DATE	LOCATION	SUPPLIER	PRODUCT DESCRIPTION	AGENT
22 Apr	AKL	Hallmark Limousines Ltd	International Airport to City Hotel (P...	106.15
22 Apr	AKL	Crowne Plaza Auckland	Superior Room	254.50
23 Apr	AKL	Our Own Office - Christchurch	14 Day All NZ Self Drive	
23 Apr	AKL	Supershuttle	Airport to Hotel Shuttle Transfer	89.82
23 Apr	AKL	Skycity Hotel	Deluxe Harbourview Room (Level 4 ...	740.36
24 Apr	AKL	Fullers Group Ltd	Auckland Harbour Cruise	100.71
24 Apr	AKL	Budget Rent A Car	Group D - Intermediate Automatic - ...	2,114.95
25 Apr	WCC	Waitomo Glow Worm Caves	Waitomo & Ruakuri Cave Combo	217.75
25 Apr	ROT	Novotel Rotorua Lakeside Hotel	Superior Room Lake View	617.88
26 Apr	ROT	Te Puia Rotorua	Guided Tour (90minutes)	78.94
26 Apr	ROT	Rotorua Museum	Admission To Museum	38.08
26 Apr	ROT	Polynesian Spa	Adult Pools & Priest Spa	53.76

BOOKING SUMMARY (NZD)				ACCOUNTS SUMMARY (NZD)	
COST	9,891.84	MARKUP (21.51%)	2,128.16	INVOICES	0.00
RETAIL	12,020.00	COMMISSION (0.00%)	0.00	RECEIPTS	0.00
AGENT	12,020.00	TAX	1,567.83	TO BE INVOICED	12,020.00
SELL	12,020.00	MARGIN (17.71%)	2,128.16	TOTAL DUE	0.00

Notes:

Create an FIT Booking

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

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 ["Create an FIT Booking" above](#) for more information on the data you can enter.
4. Do not click Save just yet - continue with procedure ["Setup a configuration during the Create Booking process" on page 13](#).
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 23](#).



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

Notes:

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 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.

Notes:

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.*

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.

Example 1: Four adults in two double rooms

ROOM CONFIGURATION						PAX NAME DETAILS
	ADULTS	CHILDREN	CHILD AGES	INFANTS	INFANT AGES	
Room 1	2	0		0		Double
Room 2	2	0		0		Double

Example 2: Seven adults in two doubles, one twin and one single

ROOM CONFIGURATION						PAX NAME DETAILS
	ADULTS	CHILDREN	CHILD AGES	INFANTS	INFANT AGES	
Room 1	2	0		0		Double
Room 2	2	0		0		Double
Room 3	2	0		0		Twin
Room 4	1	0		0		Single
Room 5	0	0		0		

Notes:

1. Create a new booking (see ["Create an FIT Booking" on page 11](#)).
2. On the Create Booking screen, choose the **Other Configuration** radio button.
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.

Notes:

Follow-Up Tasks

This concludes our course today. Your trainer will have advised you of their availability to answer questions via email post-session.

We have suggested some follow-up tasks below that will help you put into practice your new skills and knowledge. Completion of these tasks is recommended, although they are practice exercises only and your trainer will not mark or check your work.

NOTE: Remember to write down the booking reference and/or booking names, you will be able to use these bookings for your next training session.

Task 1

A family (2 adults and their 2 children, 5yr & 10yr) are travelling to a location of your choice, they would like you to quote:

- » a transfer on arrival
- » 5 nights accommodation
- » if possible a selection of short excursions or day tours
- » a departure transfer

Task 2

A couple would like to travel to a location of your choice for 14 nights while they are away they would like to have a couple of things to see and do within the location they are staying at.

Task 3

Retrieve the first booking from Task 1 and add or amend contact details for the passengers travelling. Generate a quotation for the agent.

Task 4

Retrieve the booking from Task 2. Send a queue entry message from the booking to a colleague.

Notes: