



Consultant Training Guide



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Creating a New Request

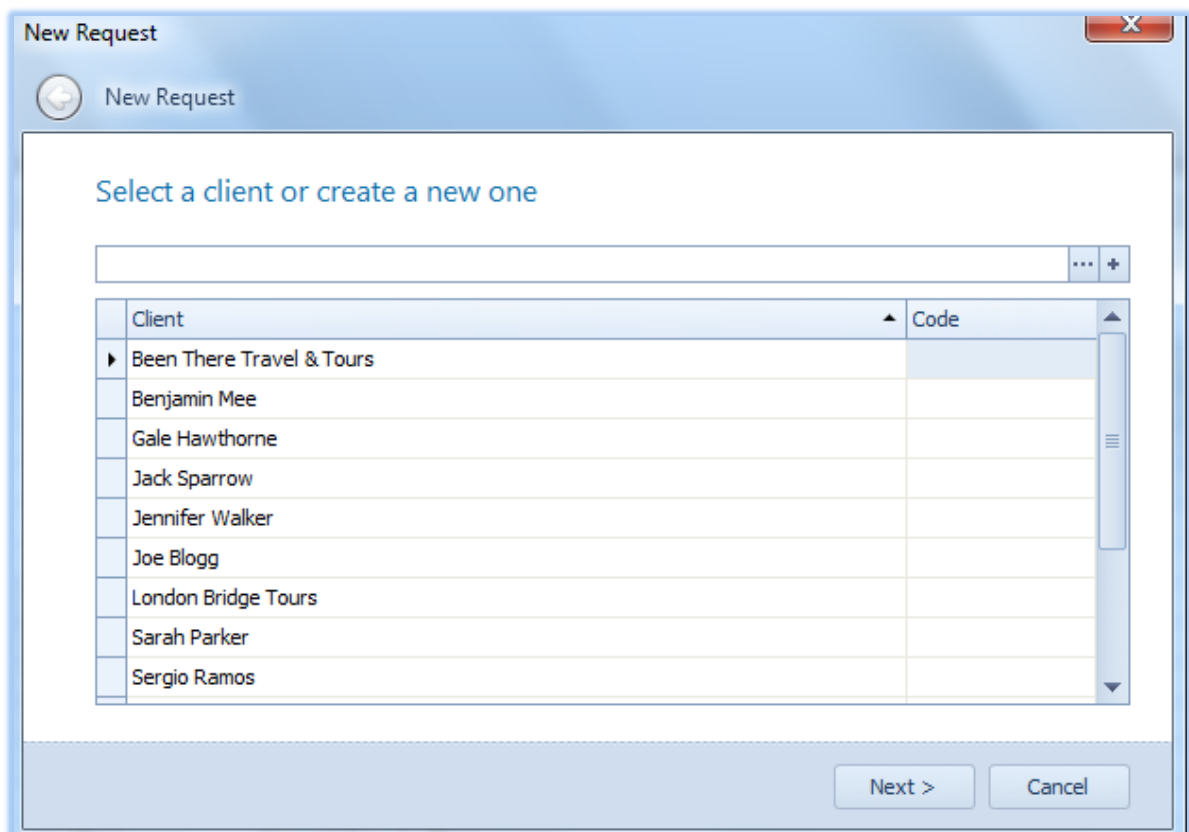


From your Dashboard, click on the 'New Request' button on the Ribbon

1. SELECT A CLIENT

In the New Request screen that will appear, you will be required to select a **Client** or create a new one:

- Click on the **Find** button  to call up a list of the Clients in the database, OR
- **Type** in the name of the client in the search field and then click on the Find button 

A screenshot of the 'New Request' window. The window has a title bar with 'New Request' and a close button. Below the title bar is a search bar with a 'Find' button (three dots) and a plus sign. Below the search bar is a table with two columns: 'Client' and 'Code'. The table contains the following rows: 'Been There Travel & Tours', 'Benjamin Mee', 'Gale Hawthorne', 'Jack Sparrow', 'Jennifer Walker', 'Joe Blogg', 'London Bridge Tours', 'Sarah Parker', and 'Sergio Ramos'. At the bottom of the window are two buttons: 'Next >' and 'Cancel'.

- If your client does not appear in the list, click on the **plus sign (+)** to add a new one
 - See the **TL4 Clients Training Guide** on how to add a new client
- If the client does appear in the list, **select** the client
- Click **Next ...**



2. ENTER THE REQUEST DETAILS

- **Request Date:** click on the drop-down for the calendar and set the travel date of the request
- **Type:** click on the drop-down and select from FIT, Group, Group Series or Incentive
- **Request Name:** enter the name of the Request or use the name that is automatically generated
 - *A default request name format can be set up to include the Client as well as the Day, Month and year of the request. This is done in the Settings section of Travellogic™*
- **Group Name:** enter the name of the Quotation Group (i.e. the set of passengers) in the Request
 - *This name is automatically generated based on the Client Name*
 - *This name pulls through onto the **Itinerary** and **Voucher** Report, so ensure that the name of the **Passengers / Traveller / Group** is entered here*
- **Source:** usually refers to a Marketing source, i.e. how did the client hear about us
[This drop down list of Sources has to be set up in Settings. From the Dashboard, go to File > Tools > Settings > Sources]
- **Priority:** click on the drop-down and select from Low, Medium, High or Critical
- **Client Contact:** this will pull through from the contact/s you have created on the Client
- **Assigned User:** this will be automatically set to the user who is creating the request, however you can assign it to another user by selecting a name from the drop-down list
- If you are assigning this request to another user, ensure that you have **ticked** the box: **'Send Message'**

Enter the following request details

Start Date:	16 June 2013	▼
Type:	FIT	▼
Request Name:	Request from Thomas Mattheus	
Group Name:	Thomas Mattheus	
Source:	(None)	▼ X
Priority:	Low	▼
Client Contact:	(None)	▼ X
Assigned User:	Tamsin	▼

☐ Send Message



Take note of this little arrow in the top left-hand corner of every New Request screen; click here to go back to the previous screen.

- Click **Next** ...



3. CAPTURE THE PASSENGERS

- Click on the **Auto** button on the right-hand panel of the screen
- Insert the number of **Sharing** and **Single** passengers
- You can also insert a Tour Leader, Driver or Guide

Auto Generate Passengers - Travelogic

Auto Generate Passengers

Total Sharing: 2

Total Single: 1

Tour Leaders: 0

Drivers: 0

Guides: 0

OK Cancel

- Click **OK**:

New Request

New Request

Capture the passengers for this request

Name	Age
▼ Sharing Group 1	
▶ Sharing Adult 1	
Sharing Adult 2	
▼ Singles	
Single Adult 1	
Total: 3	

Auto

New...

Edit...

Shift Up

Shift Down

Delete

Import...

Next > Cancel



- As you can see, all **Sharing Passengers** are automatically configured into **Passenger Groups** of 2. Each of these groups will be allocated 1 room each and charged double/twin sharing rates.
- You can also configure the passengers into triple or quadruple occupancy simply by **editing** the Passenger Group of each passenger.

Let's illustrate this:

Let's say that you need to set up a Double and Triple room

1. Click Auto to generate 5 Sharing Pax – these passengers will be organised into 3 Sharing Groups

Name
▼ Sharing Group 1
Sharing Adult 1
Sharing Adult 2
▼ Sharing Group 2
Sharing Adult 3
Sharing Adult 4
▼ Sharing Group 3
Sharing Adult 5

2. Simply double-click the 5th pax (or click Edit on the right hand side of the screen)
3. Under the **Passenger Group**, you will see this pax is allocated to Sharing Group 3
4. Click on the drop-down and **select Sharing Group 2**

Passenger

General

Passport

Insurance

Medical Requirements

Notes

Flights

Name:

Sharing Adult 5

Passenger Group:

Sharing Group 3

▼

Age:

Sharing Group 1

Sharing Group 2

Sharing Group 3

Nationality:

Sharing Group 3

Gender:

Male

▼

Passenger Type:

Standard

▼

Dietary Requirements:

Standard

▼

5. Click OK: the passengers are now organised into 2 groups: double & triple



Name
▼ Sharing Group 1
Sharing Adult 1
Sharing Adult 2
▼ Sharing Group 2
Sharing Adult 3
Sharing Adult 4
Sharing Adult 5

- To add **Child/ren** passengers, simply **edit** the existing passengers as follows:
 1. Change the Passenger **Name**: *this will differentiate children from the rest of the adult pax*
 2. Change the Passenger **Group**: *this will indicate who the child is sharing with, if applicable*
 3. Enter the **Age** of the child: *this will ensure the correct child rates are applied*

To Illustrate:

Name	Age
▼ Sharing Group 1	
Sharing Adult 1	
Sharing Adult 2	
▼ Sharing Group 2	
Sharing Adult 3	
Sharing Adult 4	
▶ Sharing Child aged 10	10

[There is a more detailed section dealing with Children in Quotations later in this document.]

- In a similar manner, you will be able edit and **personalise** the Passengers, if you have that information at this time

To Illustrate:

Name	Age
▼ Sharing Group 1	
Mr Thomas McPhee	
Mrs Audrey McPhee	
▼ Sharing Group 2	
▶ Mr Greg Owen	
Mrs Lena Owen	
Miss Emily Owen	10

[There will be a section on Editing & Updating Passenger Info later in this document.]

- Click **Next**



In the following screen you will have the option of adding **Notes** to your new request. This could be a summary of the services they require, or even a copy of the initial email request or telephone conversation.

Example:

New Request

New Request

Enter any notes about this request

Dear Mary

I have clients who are interested in spending 4 nights in Cape Town in a central city hotel, arriving 16th June.

They will make their own way to the hotel, but please arrange car hire to be delivered on the 2nd day.

Please also add 3 nights at a game lodge, this will be their first time on safari.

Please quote on 1 double (Mr/s Thomas McPhee) and 1 single (Mrs Alice Faris).

Thanks, I look forward to hearing from you!

Kind Regards

Phillipa Kennedy
Been There Travel & Tours

Finish Cancel

- Click **Finish**

Your new request has now been captured and you will find it in the **Request Screen**, as follows:

Requests							
Request	Created	Client	Name	User	Start Date	Priority	
➤ R100051	2012/02/01	Been There Travel & ...	Request for Thomas McPhee	Administrator	2012/06/16	High	
➤ R100047	2012/01/30	Jack Sparrow	Request from Jack Sparrow	Administrator	2012/04/20	Low	
➤ R100046	2012/01/25	Sergio Ramos	Request from Sergio Ramos	Administrator	2012/02/01	Medium	
➤ R100045	2012/01/24	Jennifer Walker	Request from Jennifer Walker	Administrator	2012/08/31	Low	

- You will notice that Travellogic™ has automatically generated a Request Number, i.e. **R100051**
- Click on the **plus sign (+)** to see the **Quotation** that has also been automatically generated, along with a Quotation Number: **Q100046**:



Requests

Request	Created	Client	Name	User	Start Date	Priority
▶  R100051	2012/02/01	Been There Travel & ...	Request for Thomas McPhee	Administrator	2012/06/16	High
	State	Quotation	Created	Name	User	
▶ New	Q100046	2012/02/01	Quotation for Been There Travel & Tours		Administrator	

- Use the fields at the top of the screen to **filter** Requests by **User** and **State**
 - Click on the X to clear the selected filter
- Also use the **search** field to search for requests by name

Administrator

New

thomas mcphee

 Requests

	Request	State	Created	Client	Name	User	Start Date	Priority
▶	 R100060	New	2012/02/08	Been There Travel & ...	Request for Thomas McPhee	Administrator	2012/06/16	High

- On the left-hand side of the Request screen, click on **Quotations** to see a list of all quotations instead
- You will also be able to **filter** all quotations by User and State, as well as **search** for quotations by name
 - Click on the X to clear the selected filter
- Double-click to access the New Request; you will see the following screen:

The screenshot shows the 'R100076 - Request' form. Red arrows point to specific elements with instructions:

- Click here to view or edit the client details (points to the 'View Client' button)
- View and edit the general details of the request (points to the 'Details' button)
- Click here to view, edit, copy, delete and create additional quotations (points to the 'Quotations' button)
- Click here to sync and manage emails that have been linked to this request (see more info in the section EMAILS IN TRAVELOGIC) (points to the 'Email' button)

The form fields are as follows:

Client:	Been There Travel & Tours
Name:	Thomas McPhee
Group Name:	Thomas McPhee
Type:	FIT
Request Date:	13 March 2013
Source:	(None)
Priorities:	High
Client Contact:	Bilbo
Assigned User:	Tamsin



Quotations

Once you have located your quotation on the Request screen or the Dashboard, double click to open it

INSERTING SUPPLIER SERVICES USING FIND SERVICE



Click on the **Find Services** button in the top left corner. Use the handy filters and fields on the left side of the screen to call up supplier services from the database.

These are the most popular **fields** and **filters**:

- **Service Type:** from the drop down list, select a service type ranging from accommodation to transport
- **Location:** filter the supplier services by location; click X to de-select a location
- **Supplier Name:** enter a supplier name if you know the exact supplier you would like to call up

Once you have **completed** 1 or all of these fields, press **Enter** or click the **Search** button to call up suppliers & services that match the criteria:

The screenshot shows the 'Find Services' interface. On the left, a sidebar contains search criteria and filters, highlighted with a red box. The main area displays a table of search results.

Search Criteria (Left Sidebar):

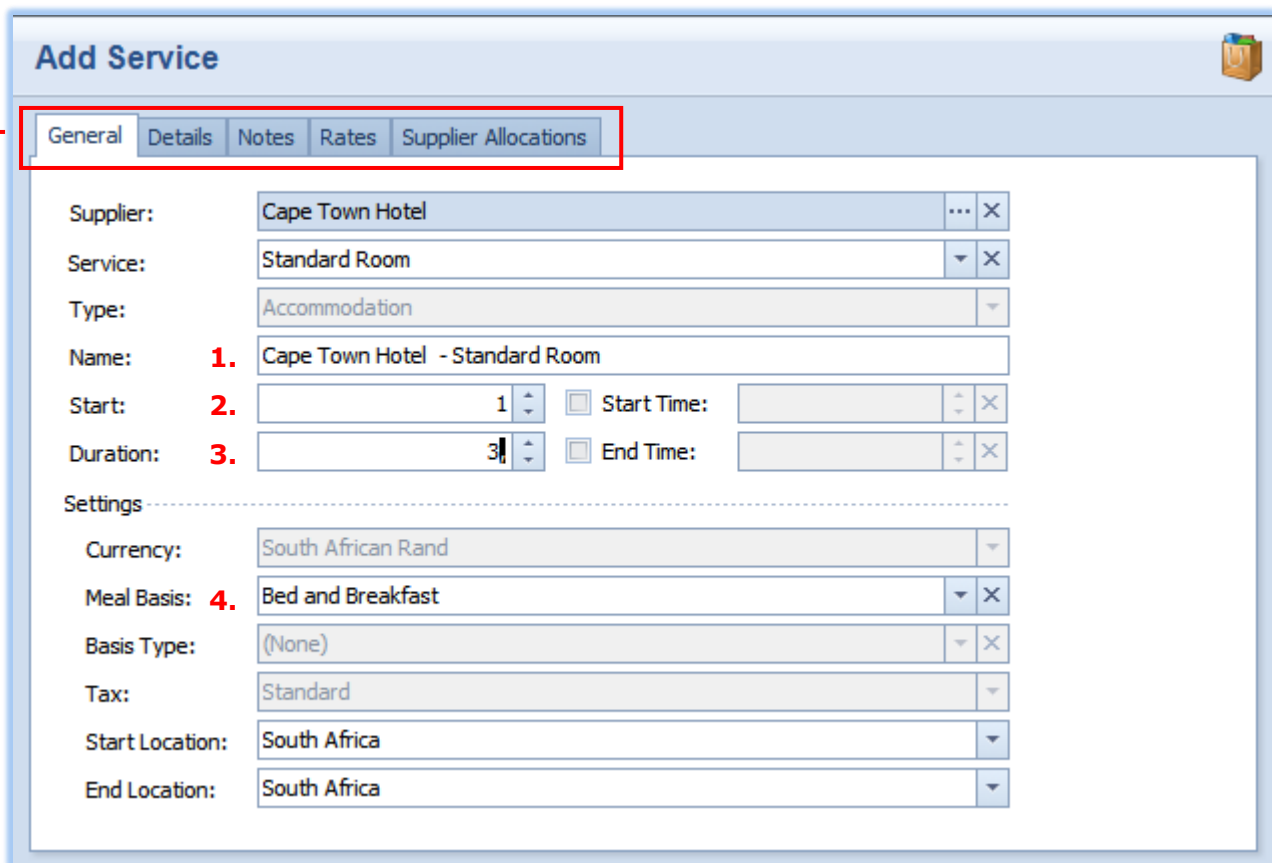
- ☐ Filter By Capacity
- Service Type: (Any Service Type) [v] [x]
- Location: Cape Town City [v] [x]
- Service Name: [text input]
- Supplier Name: cape town [text input]
- Supplier Grading: (Any Grading) [v] [x]
- Supplier Facilities: (All Suppliers) [v] [x]
- Rates Filter**
- Currency: (Any Currency) [v] [x]

Search Results Table:

Supplier	Service	Location	Duration	Qty	Max ...
Cape Town Hotel	1-bedroomed Suite	Cape Town ...	1	4	3
Cape Town Hotel	Loft Room	Cape Town ...	1	5	2
Cape Town Hotel	Luxury Room	Cape Town ...	1	9	4
Cape Town Hotel	Private Airport Transfer	Cape Town ...	1	0	7
Cape Town Hotel	Standard Room	Cape Town ...	1	16	3

Double click to select the service you want to add to your Quotation; this will bring up the following **Add Service** screen where you can:

1. Edit the **Name** of the service, if necessary
2. Edit the Start **Day / Date** of the service
3. Enter the **Duration** of the service, if applicable
4. Edit the **Meal Basis** of the service, if necessary



Take note of the Tabs at the top of the screen:

- In the **Details** tab, you have the option of:
 - Applying the service to a particular Quotation Group, or
 - Setting up the service as an Optional Service
 - Do not make a selection at this time; there will be a detailed section on **Groups and Options** later in this document
- In the **Notes** tab, you may add any notes that relate to this service (these notes can be used in the Quotation Report)
- The **Rates** tab will give you a preview of the applicable rates for the service you selected **before** you add it to the itinerary
- The **Supplier Allocations** tab will indicate whether there are allocations set up with the supplier, as well as whether the allocations are available; see the section **Making Use of Supplier Allocations**



Once you have entered the day/date and duration, click OK; this will bring up the following **Allocations** screen

Travelogic™ **automatically** generates the allocation based on the default Passengers captured at the start of the Request:

You will recall we captured 2 Sharing Pax and 1 Single Pax for this request.

Travelogic™ automatically allocated 1 room for the Sharing Pax and 1 for the Single Pax.

Pax	Name	Cost	Sell
1	Standard Room at Cape Town Hotel	2 340.00	2 808.00
2	Standard Room at Cape Town Hotel	3 240.00	3 888.00

This screen also allows you to **edit the Allocation of a Service** if necessary:

Let's say that all 3 pax would like to share the same room (provided the supplier triple occupancy, of course)

This can be done in the following 2 ways:

1. *Clear the existing allocation by highlighting both and clicking Delete*

*Now click **New** and click on the **double arrow** to move all pax from the left column to the right column*

OR

2. ***Delete** the Single Room, highlight the remaining room and click **Edit***

Highlight the Single adult, and click on the single arrow to add this pax to the Standard Room



Passenger Allocation Notes

Name: Standard Room at Cape Town Hotel

Passenger	Passenger
	Single Adult 1
	Sharing Adult 1
	Sharing Adult 2

Shift Up

Shift Down

Result:

All 3 pax have been allocated to the Standard Room:

Allocations - Travelogic

Allocations

Pax	Name	Cost	Sell
3	Standard Room at Cape Town Hotel	3 240.00	3 888.00

Auto

New...

Edit...

Delete

Click **OK**

You have now successfully inserted the service into your Quotation!

The Find Services screen is still open, so you continue by 1) selecting another service to add to the quote or 2) use the search filters to call up other services to add to your quote



INSERTING (ADHOC) QUOTATION SERVICES

A Quotation Service is an adhoc or once-off service that has not been loaded in Travellogic™. It is usually a service not used often and that does not have a set rate, i.e. a meal, an activity or a flight



From the Quotation screen, click on the **Add Service** button

- Search for and select a **supplier** (if the supplier is not loaded, create a general supplier that can be used for all adhoc services)
- In the Add Service screen, leave the **Service** as None, or if you selected a service, de-select the service by clicking the X
- Select a **Service Type** from the dropdown list
- Enter the **Name** of your service
- Enter the **Day** and **Duration**
- Enter the start and end **Time** (if applicable)
- Select the correct **Currency**, **Meal Basis**, **Basis Type**** and **Tax Type**

*** Please ensure you choose the correct **Basis Type** as this ensures the rates are displayed correctly in the quotation report for group quotations.*

- Click **OK**



- The **Allocations** Screen shows the Pax allocated to the service with a cost and sell of **zero**
- Click **OK** to add the service

The service has now been added to your quote; you will now have to **manually enter a rate** for this service

2012/06/18							
Standard Room at Cape Town Hotel	2	3	ZAR	1 860.00	12.00	2 083.20	2 083.20
Wine Tasting Evening at Cape Town Hotel	1	3	ZAR	0.00	12.00	0.00	0.00

1) Click on the  sign to show the **Allocation**

2) Click on the  sign again to show the **Passengers**

3) Enter the **per person** rate

Wine Tasting Evening at Cape Town Hotel	1	3	ZAR	0.00	12.00	0.00	0.00
Allocation					Cost	GP	Sell
Wine Tasting Evening				ZAR	0.00	12.00	0.00
Passenger					Cost	GP	Sell
Single Adult 1				ZAR	350	12.00	
Sharing Adult 1				ZAR		12.00	
Sharing Adult 2				ZAR		12.00	

- After you have entered the rate, you will see the following **Apply Adjustment** screen:
 - As this rate is not applicable to any other day, select **Current Day Only**
 - Also select **Apply to All Passengers**, as they are all paying the same amount

Apply Adjustment - Travelogic



Apply to which Days:

☒ All Days
☐ All Days With Same Value
☐ Current Day Only

Apply To which Passengers

☒ All Passengers
☐ All Passengers with Same Value
☐ All Passengers Of Same Type
☐ Current passenger Only

☐ Adjust Profit

OK Cancel



- Click **OK**
- The **result**: the per person as well as the total cost and sell of the service has been added:

Wine Tasting Evening at Cape Town Hotel	1	3	ZAR	1 050.00	12.00	1 176.00	1 176.00
Allocation					Cost	GP	Sell
Wine Tasting Evening			ZAR	1 050.00	12.00	1 176.00	
Passenger				Cost	GP	Sell	
Single Adult 1			ZAR	350.00	12.00	392.00	
Sharing Adult 1			ZAR	350.00	12.00	392.00	
Sharing Adult 2			ZAR	350.00	12.00	392.00	

Once you added the quotation service and the rate, you can also add a **Description** that will provide the client with more information about the service. This description pulls through to the itinerary

- Double click on the service or click **Edit Service** at the top of the screen
- Click on the **Descriptions** Tab
- Click **New** and select description
- Enter the **Name**
- Select the **Type** and **Language**
- Specify the **Day** you would like the description to appear, e.g. if this is a multi-day service, you can:
 - Select to add the description to a **specific** day of the service, or
 - Add a description to **each** day of the service

Description

Name:

Type:

Language:

Day:

You will have a wonderful opportunity to interact with winemakers as they share their knowledge and passion on a topic close to their heart. Wines will be paired with a 4-course dinner from the hotel's executive chef, Peter Pollock. With everyone sitting at one long table, guests will be encouraged to ask questions and offer opinions.



THE QUOTATION SCREEN

In the Quotation Screen you will see the **list of services** you have inserted:

Q100095 Thomas McPhee - Quotation														
Thomas McPhee														
File Quotation Services														
Find Services Add Service Delete Service Show Pricing Refresh Rates Copy Rates Validate Itinerary Insert Package Move Services Move Up Move Down Date Service Type Hide Detail Show Detail Undo Redo														
Services Actions Arrange Group By Detail Changes														
Day	Service	Start	End	Qty	Pax	D	G	T	Me...	Cost	GP	Sell	Total	
▼ Sunday, 16 June 2013														
⊕	1 Cape Town Hotel - Private Airport Transfer			1	4	0	0	0		ZAR	1 230.00	12.20	1 380.00	1 380.00
⊕	1 Anytime Car Hire - Group A (VW Chico or Similar) Supercover			1	4	0	0	0		ZAR	181.00	12.71	204.00	204.00
⊕	1 Anytime Car Hire - Delivery/Collection Fee (After Hours)			1	4	0	0	0		ZAR	292.00	12.33	328.00	328.00
⊕	1 Anytime Car Hire - Contract Fee			1	4	0	0	0		ZAR	181.00	12.71	204.00	204.00
⊕	1 Cape Town Hotel - Standard Room			2	4	0	0	0	BB	ZAR	1 860.00	12.03	2 084.00	2 084.00
▼ Monday, 17 June 2013														
⊕	2 Vita Tours - Private Full Day Cape Point & Peninsula Tour	09:30 AM	17:30 PM	1	4	0	0	0		ZAR	2 732.00	12.01	3 060.00	3 060.00
⊕	2 Anytime Car Hire - Group A (VW Chico or Similar) Supercover			1	4	0	0	0		ZAR	181.00	12.71	204.00	204.00
⊕	2 Cape Town Hotel - Standard Room			2	4	0	0	0	BB	ZAR	1 860.00	12.03	2 084.00	2 084.00
▼ Tuesday, 18 June 2013														
⊕	3 Anytime Car Hire - Group A (VW Chico or Similar) Supercover			1	4	0	0	0		ZAR	181.00	12.71	204.00	204.00
⊕	3 Cape Town Hotel - Standard Room			2	4	0	0	0	BB	ZAR	1 860.00	12.03	2 084.00	2 084.00
▼ Wednesday, 19 June 2013														
⊕	4 Anytime Car Hire - Group A (VW Chico or Similar) Supercover			1	4	0	0	0		ZAR	181.00	12.71	204.00	204.00

**Let's discuss the Column Set Up:**

- The **Day** Column displays the day number of your quotation
- **Service** Column:
 - The services are displayed on a **day-to-day** basis under a Date Header.
 - Click on the  to **collapse** the Header (hide the services from view) or on the  to expand the Header (show the services).
- The **Start Time** and **End time** of each service is displayed in the following 2 columns
- The **Qty** (Quantity) Column displays the number of services (rooms, transfers, vehicles, tours, etc.) in the quote
- The following columns show the number of **Pax, Drivers (D), Guides (G) and Tour Leaders (T)** allocated to each service
- The **Cost** Column displays the **total per day cost price** of this service
- The **GP** Column displays the percentage of **markup / margin** added to the Service
- The **Sell** Column displays the **total per day sell price** of this service
- The **Total** column displays the total per day sell price in the **quotation currency**
 - I.e. if you have added services in a currency different to the quotation currency, the:*
 - **Sell Column** will display the total per day sell price in the **service currency**
 - **Total Column** will display the total per day sell price in the **quotation currency**

Let's take a closer look at the Services:

By clicking on the plus signs  you able to view the detailed information and breakdown of:

- 1) The **Allocation** shows the breakdown of the rooms allocated to each service, the pax number and rates

Day	Service	Qty	Pax	D	G	T	Cost	GP	Sell	Total
▼ Sunday, 16 June 2013										
1	Cape Town Hotel - Standard Room	2	4	0	0	0	ZAR 1 860.00	12.03	2 084.00	2 084.00
	Allocation		PAX	D	G	T	Cost	GP	Sell	
	▶ Cape Town Hotel - Standard Room	3	0	0	0	0	ZAR 1 080.00	12.02	1 210.00	
	▶ Cape Town Hotel - Standard Room	1	0	0	0	0	ZAR 780.00	12.05	874.00	



2) The **Passengers**: a breakdown of each passenger allocated to a room / service, as well as their rates

1. First Room – Sharing

Day	Service	Qty	Pax	D	G	T		Cost	GP	Sell	Total
▼ Sunday, 16 June 2013											
1	Cape Town Hotel - Standard Room	2	4	0	0	0	ZAR	1 860.00	12.03	2 084.00	2 084.00
	Allocation		PAX	D	G	T		Cost	GP	Sell	
	Cape Town Hotel - Standard Room	3	0	0	0	0	ZAR	1 080.00	12.02	1 210.00	
	Passenger							Cost	GP	Sell	
	Sharing Adult 1						ZAR	540.00	12.04	605.00	
	Sharing Adult 2						ZAR	540.00	12.04	605.00	
	Sharing Child						ZAR	0.00	12.00	0.00	
	Cape Town Hotel - Standard Room	1	0	0	0	0	ZAR	780.00	12.05	874.00	

2. Second Room – Single

Day	Service	Qty	Pax	D	G	T		Cost	GP	Sell	Total
▼ Sunday, 16 June 2013											
1	Cape Town Hotel - Standard Room	2	4	0	0	0	ZAR	1 860.00	12.03	2 084.00	2 084.00
	Allocation		PAX	D	G	T		Cost	GP	Sell	
	Cape Town Hotel - Standard Room	3	0	0	0	0	ZAR	1 080.00	12.02	1 210.00	
	Cape Town Hotel - Standard Room	1	0	0	0	0	ZAR	780.00	12.05	874.00	
	Passenger							Cost	GP	Sell	
	Single Adult 1						ZAR	780.00	12.05	874.00	

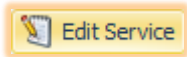
3. Transfer - All Pax

Day	Service	Qty	Pax	D	G	T		Cost	GP	Sell	Total
▼ Sunday, 16 June 2013											
1	Cape Town Hotel - Private Airport T...	1	4	0	0	0	ZAR	1 230.00	12.20	1 380.00	1 380.00
	Allocation		PAX	D	G	T		Cost	GP	Sell	
	Cape Town Hotel - Private Airpor...	4	0	0	0	0	ZAR	1 230.00	12.20	1 380.00	
	Passenger							Cost	GP	Sell	
	Sharing Adult 1						ZAR	307.50	12.20	345.00	
	Sharing Adult 2						ZAR	307.50	12.20	345.00	
	Sharing Child						ZAR	307.50	12.20	345.00	
	Single Adult 1						ZAR	307.50	12.20	345.00	



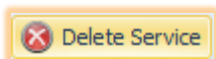
EDITING A QUOTATION

There are several tools in the Ribbon at the **top of the Quotation Screen** that will allow you to edit the services:



Edit Service enables you to do the following:

- **Replace** the Supplier, and thereby, the service
- **Rename** the service as to how you would like it to display on the itinerary
- Amend the **Date** of the service
- Amend or add the **Start and End Times** (applicable to transfers, tours, car hire, etc.)
- Amend the **Passenger Allocation** of the service
- Add **Reservation Details** once the service has been booked / confirmed



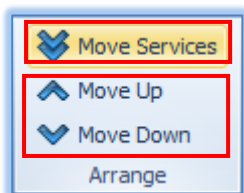
Click on **Delete Service** to delete a service you no longer need in the Quotation



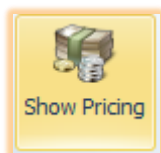
After amending the *Services, Allocation or Group*, click the **Refresh Rates** button to apply the changes



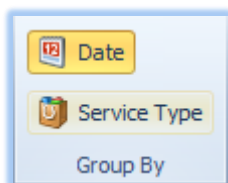
Then click on the **Save** button to save your quotation and any changes you make



- 1) **Move Services** enables you to move all or selected services by **1 or more days**
- 2) **Move Up / Move Down**: Use these buttons to rearrange the **Order** of your services *within* a specific day



Use the **Show Pricing** button to see a summary of the Quotation including a breakdown of service and quotation totals.



By default your services are grouped by **Date**.

Select Service Type to group the services by **Type**.



Editing the Details of a Service

Amend the details of services you have added to your quotation.



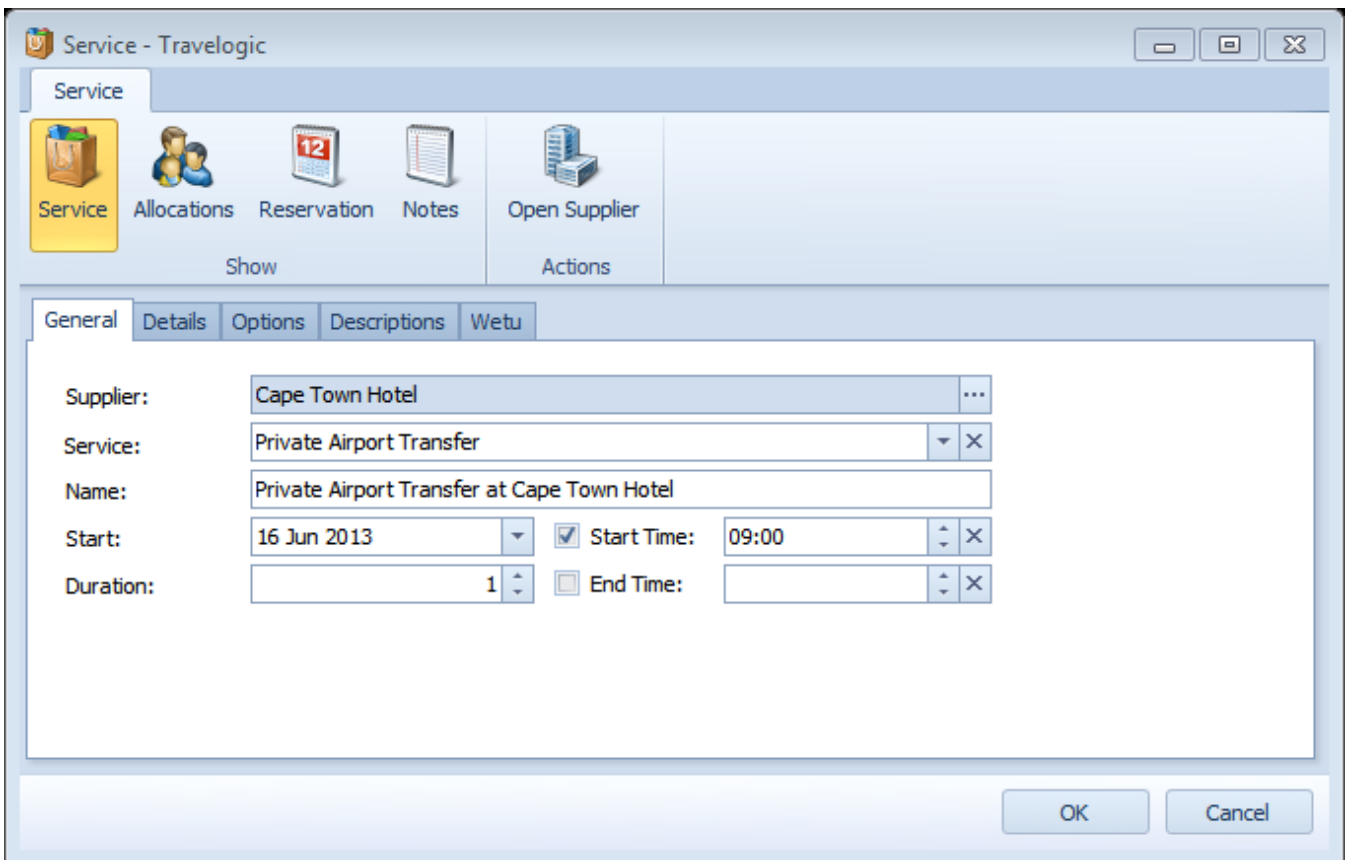
Click on **Edit Service** in the Ribbon at the top of your screen

Under the '**General**' tab, you will be able to do the following:

- Click on the ellipsis  next to the name of the **Supplier**;
This enables you to replace the current supplier
- Click on the drop down next to the name of the **Service**;
This enables you to replace the current service
- Amend the **Name** or description of the service
- Amend the start and end **Dates** of the service
- Amend the start and end **Times** of the service

*More information on
[Replacing Services to
follow later in this
document](#)*

This is a screenshot of the Private Airport Transfer service:



Service - Travelogic

Service | Allocations | Reservation | Notes | Open Supplier

Show | Actions

General | Details | Options | Descriptions | Wetu

Supplier: Cape Town Hotel ...

Service: Private Airport Transfer ▾ ×

Name: Private Airport Transfer at Cape Town Hotel

Start: 16 Jun 2013 ▾ ☒ Start Time: 09:00 ▴ ▾ ×

Duration: 1 ▴ ▾ ☐ End Time: ▴ ▾ ×

OK Cancel



Under the '**Descriptions**' tab, you will be able to add various descriptions to your service:

- **Description:** this is a **once-off** description (i.e. for this quotation only) that will appear on the itinerary
- **Prefix:** the prefix description will appear **before** the service on the itinerary
- **Suffix:** the suffix description will appear **after** the service on the itinerary

To illustrate:

Let's add a quotation service for a meal that takes place on the client's day of departure

On the service, we added a **description** of the restaurant, as well as a **prefix** and **suffix** as follows:

Description	Language
▼ Description	
Description	en
▼ Prefix	
Prefix	en
▼ Suffix	
Suffix	en

The description, prefix and suffix will be added to the client's Itinerary as follows:

Fri 13 July 2012

On arrival at Cape Town International Airport, make your own way to the Really Fancy Restaurant, where you will enjoy a relaxing meal in beautiful surroundings.

Delicious Buffet Lunch at Really Fancy Restaurant

When you are planning to eat at a fancy restaurant, obviously that restaurant must meet your high standards and expectations. With your evening centered on the restaurant meal, you want to ensure to have a very positive experience. But what are the benchmarks of a good fancy restaurant? And how does it differ from just mediocre restaurants? A successful fancy restaurant transcends beyond just food. It offers a dining experience, an adventure in taste. The really superb restaurant does so subtly, without drawing attention to it. However, the real efforts that the restaurant managers and chefs put forth are behind the scenes; you as a customer only see a flawless execution of service and top-quality food.

After lunch, make your way back to Cape Town International Airport to check in for your flight home.

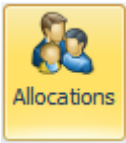
Prefix

Description

Suffix



EDITING THE PAX ALLOCATION OF A SERVICE



Click on **Edit Service** in the Ribbon at the top of your screen

Click on the '**Allocations**' button to **edit** the pax allocated to this service:

To Illustrate:

Let's say our Single Adult will not require the transfer; he will arrive later than the Sharing Adults and will make his own way to the hotel.

Click **Edit ...**; highlight the Single Adult; click on the  arrow to exclude the Single Adult from the service.

Allocation - Travellogic

Allocation

Passenger Allocation Notes

Name: Private Airport Transfer at Cape Town Hotel

Passenger		Passenger
▼	>>	Sharing Adult 1
▶ Single Adult 1	>	Sharing Adult 2
	<	
	<<	

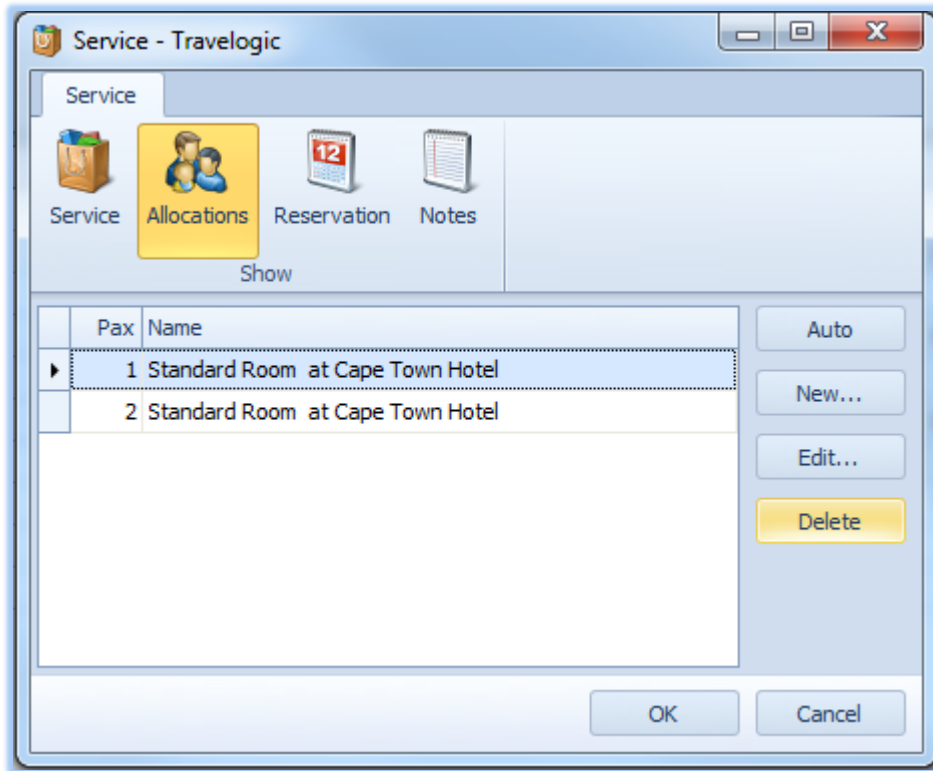
Shift Up
Shift Down

OK Cancel

**Another Example:**

The Single Adult would like to upgrade to a Luxury Room.

In the Allocation screen for the Standard Room, Delete the Room for the Single Adult



Add the **Luxury Room** to the quotation as normal

In the Allocation screen, **delete** the room for the Sharing Pax

Result:

Note the **Qty** (quantity) column showing the number of rooms

Note the **Pax** column showing the number of passengers in each room

Service	Qty	Pax		Cost	GP	Sell	Total
▼ 2012/06/16							
☐ Standard Room at Cape Town Hotel	1	2	ZAR	1 080.00	12.00	1 209.60	1 209.60
☐ Luxury Room at Cape Town Hotel	1	1	ZAR	910.00	12.00	1 019.20	1 019.20
▼ 2012/06/17							
☐ Standard Room at Cape Town Hotel	1	2	ZAR	1 080.00	12.00	1 209.60	1 209.60
☐ Luxury Room at Cape Town Hotel	1	1	ZAR	910.00	12.00	1 019.20	1 019.20
▼ 2012/06/18							
☐ Standard Room at Cape Town Hotel	1	2	ZAR	1 080.00	12.00	1 209.60	1 209.60
☐ Luxury Room at Cape Town Hotel	1	1	ZAR	910.00	12.00	1 019.20	1 019.20

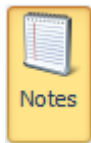


Also in the Service screen you will be able to do the following:



Once the service has been booked / confirmed, click on the **Reservation** button to enter the reservations details

(More detail on this to follow ...)



Click on the **Notes** button to enter notes specific to the service (these notes are for internal use only)

REPLACING A SERVICE

You may need to replace an existing service in your quotation, for the following reasons:

- You added a quotation service using a “general” supplier; the actual supplier has since been loaded into the database and you can now replace the former with the latter
- The hotel has upgraded your clients on a complimentary basis; you need to amend the service but keep the rate as is

Highlight the service you need to replace and click Edit Service

- 1) When replacing the **Supplier**, click on the ellipsis  to search for and select a new supplier
- 2) When replacing the **Service**, click on the drop down and select a new service
 - *Alternatively, if you are replacing the service with a **Quotation Service**, de-select the service  and add your quotation service to the Description field*
- 3) Click **OK**
- 4) You will be prompted to **Refresh Rates**



EDITING A QUOTATION GROUP

The **Quotation Group** is the name we have given to the set of Passengers captured in your Quote

At the top of the Quotation screen you will find the name of your **Group** listed, along with 3 small buttons:



These Buttons enable you to:



Add New

Create an **Additional** group

(You will use this function mostly for Groups and Groups Series, which will be covered in detail later in this document)



Edit

The **Group Button** allows you to **Edit** the following:

- 1) **Name** of the group
- 2) **Start Date** of the Itinerary

The **Passengers Button** allows you to **Edit** the following:

- 1) **Number** of Passengers (Add or Delete)
- 2) Passenger **Information**



Delete

Delete a group

Let's learn more about **Editing Passenger Numbers**:

Click on the **Edit** Button:

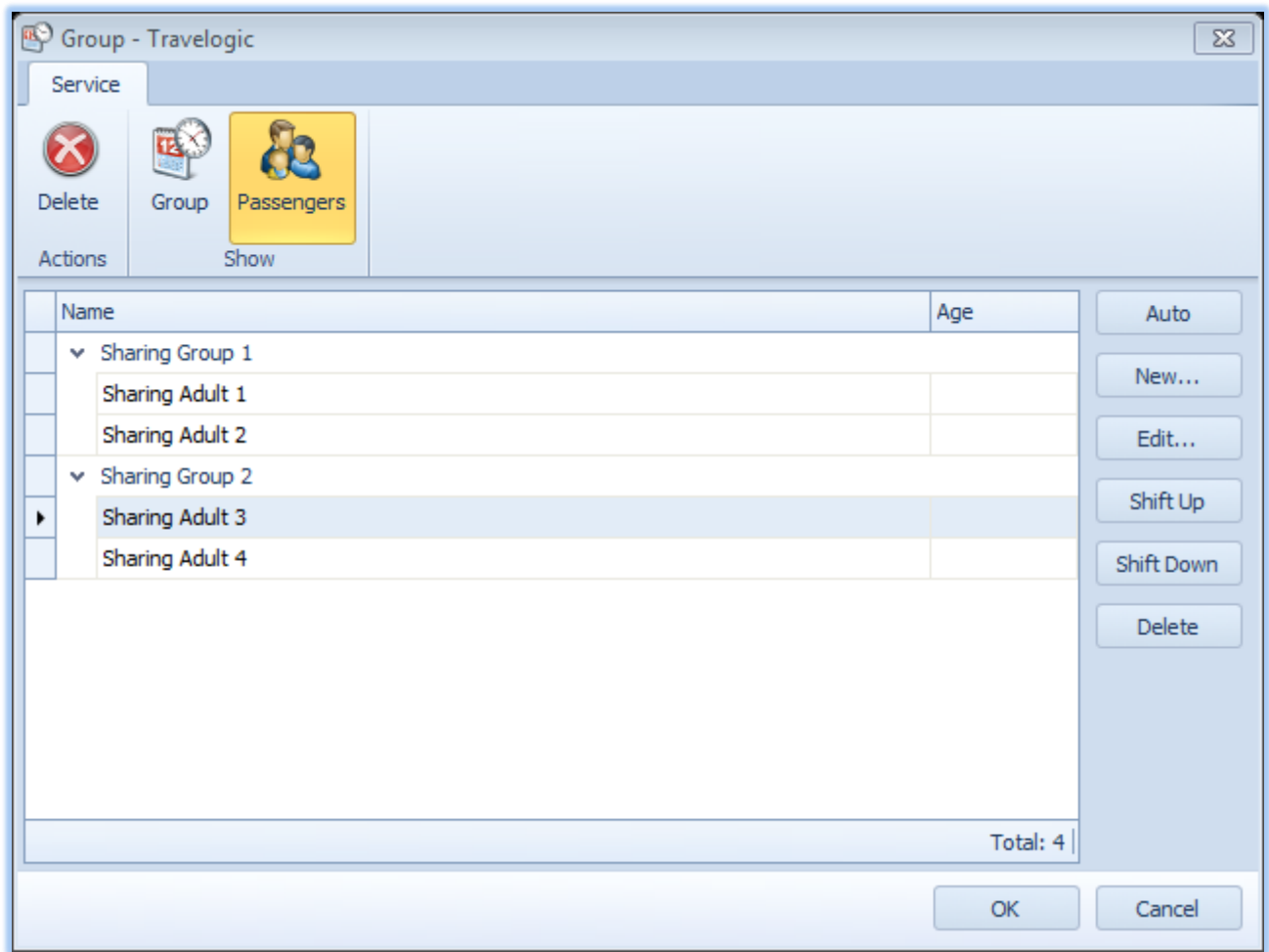
- Click on the **Passengers** Button
- Make use of the **Auto**, **New** or **Delete** buttons on the right hand side of the screen to increase or decrease the number of pax

To Illustrate:

You will recall we captured 2 Sharing and 1 Single Pax at the start of the Request

Let's say the Single pax has decided to cancel, however another couple will be joining

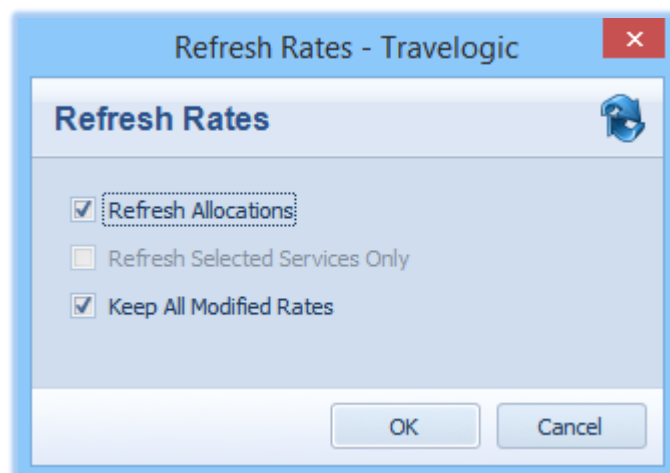
- 1) In the Passenger screen, highlight the Single Pax and click **Delete**
- 2) Click **Auto** and add 2 more Sharing Pax, click OK
- 3) Travellogic will now **automatically** add the additional pax in the **same format** as the original



Name	Age
▼ Sharing Group 1	
Sharing Adult 1	
Sharing Adult 2	
▼ Sharing Group 2	
▶ Sharing Adult 3	
Sharing Adult 4	

Total: 4

- 4) Click **OK**
- 5) You will now be prompted to **Refresh Rates**
 - a) Ensure that the **Refresh Allocation** box is ticked in order to **update** the passenger numbers
 - b) Leave the **Keep All Modified Rates** box ticked to ensure that all manually added or overridden rates and services in your quote are not affected



Refresh Rates

☒ Refresh Allocations

☐ Refresh Selected Services Only

☒ Keep All Modified Rates

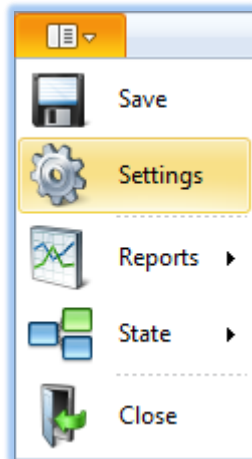
OK Cancel



(EDITING) QUOTATION SETTINGS

Click on the orange File button in the top left hand corner of the Quotation screen

Click on **Settings**:



General Tab: here you can **view** the details of your Quotation and Request:

Settings - Travellogic

Settings

General Details Package Custom Fields Notes

Quotation Number: **Q100165**

Quotation State: **New**

Name: Quotation for Thomas McPhee

Rate Selection Mode: Lowest Cost

Currency: South African Rand

Source: (None)

☐ Local Transaction

☐ Integrate with Accounting Package

Request

Client Name: **Thomas McPhee**

Client Location: **New York**

Request Type: **FIT**

Request Number: **R100156**

Request State: **New**

OK Cancel



You will also be able to **edit** the following information:

- The **Name** of the Quotation
- The **Rate Selection Mode** for this quotation:
 - *the default rate selection is Lowest Cost, however you will be able to change it to Manual*
- The **Currency**
- Select the **Source**
- Use the tick box to indicate whether this is a **Local Transaction**
- Use the tick box to **Integrate with Accounting Package**; *if Travellogic™ is already set up to integrate with an accounting package, this will be automatically ticked*

Details Tab: by selecting a Date and Time, you will be able to track the **Date Quoted**

- *Select date and time that you replied to your client with your quotation*
- *This is a handy feature to track your response times*

Package Tab: you will be able to set up this quotation as a package ... [more information on this later in the document ...](#)

Custom Fields Tab: if you have any custom fields set up in Travellogic, the fields will have to be completed in this tab

Notes Tab: use this area to add any notes regarding this quotation. These notes are for internal use only and will not pull through onto any documentation



REPORTS: The Quotation Report

The Quotation Report gives you a detailed **daily cost breakdown** of each **service** in the quotation, and is **ideal for Internal use**, but can also be sent to clients

Click on the orange File menu, select **Reports** then **Quotation**

In the **Run Quotation Report** screen, you have the following options:

Detail

- Show Costs → *leave un-ticked when sending to a client / tick for internal use to show cost & GP*
 - Group By Service Types → *tick to show services grouped together by service type*
 - Show Service Status
 - Show Service Booking Ref
 - Show Service Notes
 - Show Service Incl and Excl*
 - Show Service Times
- select the type/s of service info you need to show in the report*

** This option refers to the meal basis descriptions for this service and will appear at the end of the report*

Daily Pricing

- Show Service Pricing → *shows the daily total of each service*
- Show Service and Allocation Pricing → *shows the Per Unit or Per Room total of each service*
- Show Service, Allocation and Passenger Pricing → *shows the P/P/Sharing, Single or Child total*

Pricing

- Show Quote Currency → *shows the Pax & Quote Totals in the default currency of the quote ***
- Show Multiple Currencies → *shows the Pax & Quote Totals in the currency/ies of the supplier*
- Show Passenger Totals → *shows the Passenger totals at the end of the quote*
- Show Shared Costs → *shows the costs generated by the Tour Leader, Driver & Guide*
- Show Quotation Totals → *shows the Quote Totals at the end of the quote*
- Show Group Totals → *shows the Passenger and Quotation totals for each Group in the quote*
- Show Service Type Totals → *shows a list of the Service Type totals at the end of the quote*
- Show Group Summary → *summarises the Pax Totals into Per Person Sharing and Per Single prices, also summarises the Service Pricing into Per Unit and Per Person, as applicable*
- Split Per Person Services → *applies to "Show Group Summary" – shows the applicable adult & child prices*
- Show Exchange Rates → *shows the exchange rate per service line*

**** the Quote Currency defaults to the Home Currency, however this can be adjusted per quote in the settings section of the Quotation by clicking File > Settings**



Optionals

- Show Optional Items → *shows separate pricing for optional services*

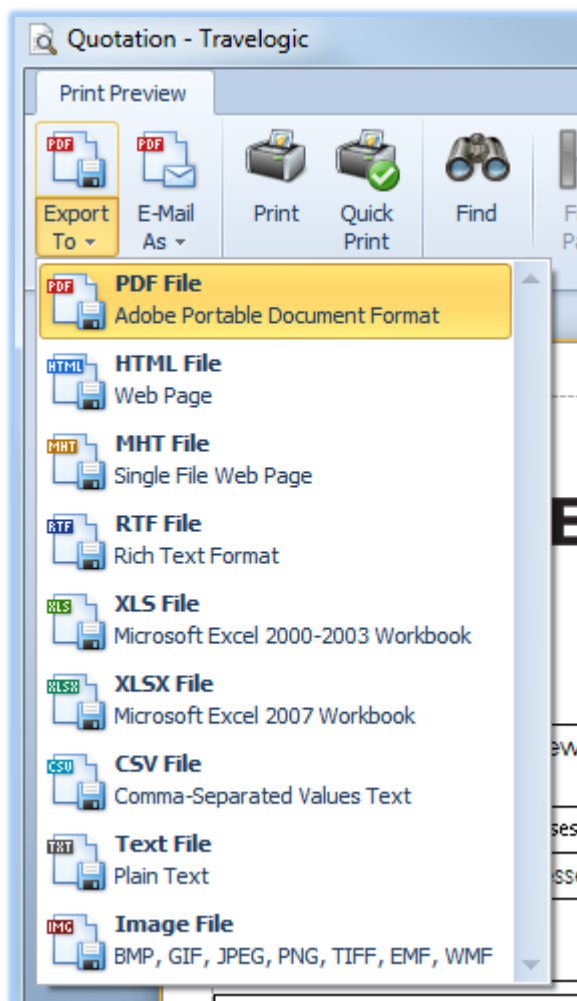
Report Settings Options

- Use Client Logo → *displays the client's logo (instead of your own) on the report*
- Use Client Address → *displays the client's (physical) address on the report*

Now click **View** (runs the report but leaves the Run report screen open in case you need to make adjustments) or **OK** (runs the report but closes the Run Report screen)

Once you have run the Quotation Report, you are able to **export** it to various **formats** for forwarding and editing purposes

- Click on the **Export To** button at the top left-hand side of the screen:



Note that you are also able to **E-Mail** this report in any of these formats - this action generates an **Outlook Email** with the report attached in your chosen format



REPORTS: The Quotation Summary Report

The Quotation Summary Report summarises the number of **days/nights** per service and prices **per passenger**

This report is also **ideal for Internal use**, but can be sent to clients

Click on the orange File menu, select **Reports** then **Quotation Summary**

In the **Run Quotation Summary Report** screen, you have the following options:

Detail

- Show Costs → *leave un-ticked when sending to a client / tick for internal use to show cost & GP*
 - Group By Service Types → *tick to show services grouped together by service type*
 - Show Service Booking Ref
 - Show Service Notes
 - Show Service Times
- } *select the type/s of service info you need to show in the report*

Pricing

- Show Quote Currency → *shows the Pax & Quote Totals in the default currency of the quote **
- Show Multiple Currencies → *shows the Pax & Quote Totals in the currency/ies of the supplier*
- Show Passenger Totals → *shows the Passenger totals at the end of the quote*
- Show Shared Costs → *shows the costs generated by the Tour Leader, Driver & Guide*
- Show Group Totals → *shows the Passenger and Quotation totals for each Group in the quote*
- Show Service Type Totals → *shows a list of the Service Type totals at the end of the quote*
- Split Per Person Services → *shows separate adult & child prices*
- Show Exchange Rates → *shows a list of the exchange rates used in the quote*

Optionals

- Show Optional Items → *shows separate pricing for optional services*

* the Quote takes on the default system currency, however this can be adjusted per quote in the quotation's Settings

Once you have run the Quotation Summary Report, you are also able to **export** it to various **formats** for forwarding and editing purposes, as well as **email** it using Outlook, as demonstrated in the page above.



REPORTS: The Itinerary Report

The Itinerary Report gives you a detailed itinerary using descriptions and pictures, among others

Click on the orange File menu, select **Reports** then **Itinerary**

In the **Run Itinerary Report** screen, you have the following options:

Location Details

- Show Location Description
- Location Description Type
- Nr of Location Pictures

use these options to show location descriptions & pictures in your itinerary {these descriptions & pictures have to be pre-loaded under each location in Settings}

Supplier Information

- Show Accom Details Separately
- Show Supplier Grading
- Show Supplier Contact Information
- Show Supplier Address
- Show Supplier Website
- Show Supplier Description
- Supplier Description Type
- Nr of Supplier Pictures

→ *separates the following supplier info from the day-to-day itinerary; it is shown at the start or end of the itinerary*

use these options to display supplier-specific information, descriptions & pictures in your itinerary {this information has to be pre-loaded on each supplier in the Travellogic database}

Service Information

- Show Service Descriptions
- Service Description Type
- Nr of Service Pictures
- Show Meal Basis Note
- Show Guest Notes
- Show Service Times

use these options to display service-specific descriptions, meal basis descriptions, guest notes, service times, as well as pictures in your itinerary {these descriptions, notes and pictures have to be preloaded on the supplier services}

Daily Pricing

- Do Not Show Daily Pricing → *does not show a breakdown of daily service totals*
- Show Service Pricing → *shows the daily total of each service in the body of the Itinerary*
- Show Service and Allocation Pricing → *shows the Per Unit or Per Room total of each service*
- Show Service, Allocation and Passenger Pricing → *shows the P/P/Sharing, Single or Child total*

Pricing

- Show Totals in Multiple Currencies
- Show Totals in Quote Currency

choose whether to show the Pax & Quote Totals in the default and / or multiple currencies {this only applies if there are multiple currency services in the quote}*



- Show Multi and Quote Currency
- Show Service Type Totals → *shows a breakdown of the totals per Service Type at the end of the quote*
- Show Passenger Totals → *shows each Passenger's total price*
- Show Tour Total → *shows the total price of the Quotation*
- Show Package Breakdowns → *shows a breakdown of packaged and non-packaged services ***
- Show Group Total → *shows the Passenger totals, i.e. Per Person Sharing & Per Single for ALL the Groups*
- Show Commissions → *shows a breakdown of the total commission in the quote*
- Summarise Pricing → *summarises the Passenger Totals into Per Person Sharing and Per Single prices*

* the Quote takes on the default system currency, however this can be adjusted per quote in the quotation's Settings

** Non-packaged are services whose prices you would like to have split out from the Per Person and Quote Total, i.e. Airport Taxes

Additional Info

- Show Summarised Itinerary → *shows a summary of services at the start or end of the itinerary*
- Group Flights → *show all flights grouped together at the start of the itinerary*
- Hide Dates → *tick to hide all service dates in the itinerary; only the Days will be displayed*
- Centre Pictures → *centres all the pictures displayed in the itinerary*
- Show Confirmation No. → *shows the confirmation reference numbers of the services*

Report Settings Options

- Use Client Logo → *displays the client's logo (instead of your own) on the report*

Now click **View** (runs the report but leaves the Run report screen open in case you need to make adjustments) or **OK** (runs the report but closes the Run Report screen)



Quotations with Optional Services

Travellogic™ also enables you to provide your client with various Options within a Quotation

There are **2 Optional Types**:

REPLACEMENT OPTIONS

Replacement options are most often applicable to accommodation; this service serves as an alternative to an existing service. The cost of this service is not included in the quote total, and the Report will display the *difference in price* between the services.

Let's insert a Replacement Option:

- Click **Add Service** and select Add Existing Service, click Next
- Add details: **supplier**, **service**, start and end **dates** (preferably the same dates as the service you are replacing), click Next
- Select **Optional Type**: Replacement
- **Optional Service**: from the drop-down list, select the (existing) service that this new service will be replacing.

New Quotation Service - Travellogic

← Add Service

Enter the following additional information about this service

Quotation Group: (All Quotation Groups) ▼ ✕

Optional Type: Replacement ▼

Optional Service: Standard Room at Cape Town Hotel ▼ ✕

☐ Local Transaction

☐ Cash Transaction

☐ Non Package Service

☐ Hide Service on Reports

☐ Hide Amount on Reports

Finish Cancel



- Click **Finish** and allocate the Pax
- The service is added to the quote, directly under the existing service, and will display as a **light grey** colour to show that it is an **Optional** service.

Service	Qty	Pax	Cost	GP	Sell	Total
2012/06/16						
Standard Room at Cape Town Hotel	2	4	ZAR 2 160.00	12.00	2 419.20	2 419.20
Luxury Room at Fabulous Hotel	2	4	ZAR 1 520.00	12.00	1 702.40	1 702.40
2012/06/17						
Standard Room at Cape Town Hotel	2	4	ZAR 2 160.00	12.00	2 419.20	2 419.20
Luxury Room at Fabulous Hotel	2	4	ZAR 1 520.00	12.00	1 702.40	1 702.40
2012/06/18						
Standard Room at Cape Town Hotel	2	4	ZAR 2 160.00	12.00	2 419.20	2 419.20
Luxury Room at Fabulous Hotel	2	4	ZAR 1 520.00	12.00	1 702.40	1 702.40
2012/06/21						
Private Airport Transfer at Cape Town Hotel	2	4	ZAR 1 640.00	12.00	1 836.80	1 836.80

- If the client chooses this service, select the service and click on **Edit Service**:
 - Click on the **Options** tab
 - **Optional Type**: select None
 - **Optional Service**: click on the X next to the drop-down arrow to change to (None)

General Details Options

Quotation Group: (All Quotation Groups) [X]

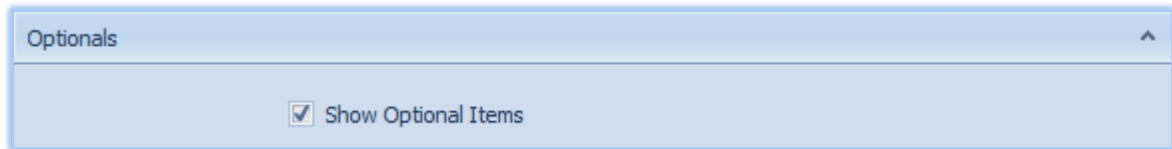
Optional Type: None [v]

Optional Service: (None) [X]

- Click **OK**



When running the **Quotation Reports**, make sure you *tick Show Optional Items*, as follows:



Optionals

☒ Show Optional Items

The Optional Services will be displayed at the end of the report, along with the supplemental price, as follows:

Options

Accommodation

And/Or replace Cape Town Hotel - Standard Room with Fabulous Hotel - Luxury Room on 2013/06/18

ZAR 2,301.00 More Per Single For 3 Nights

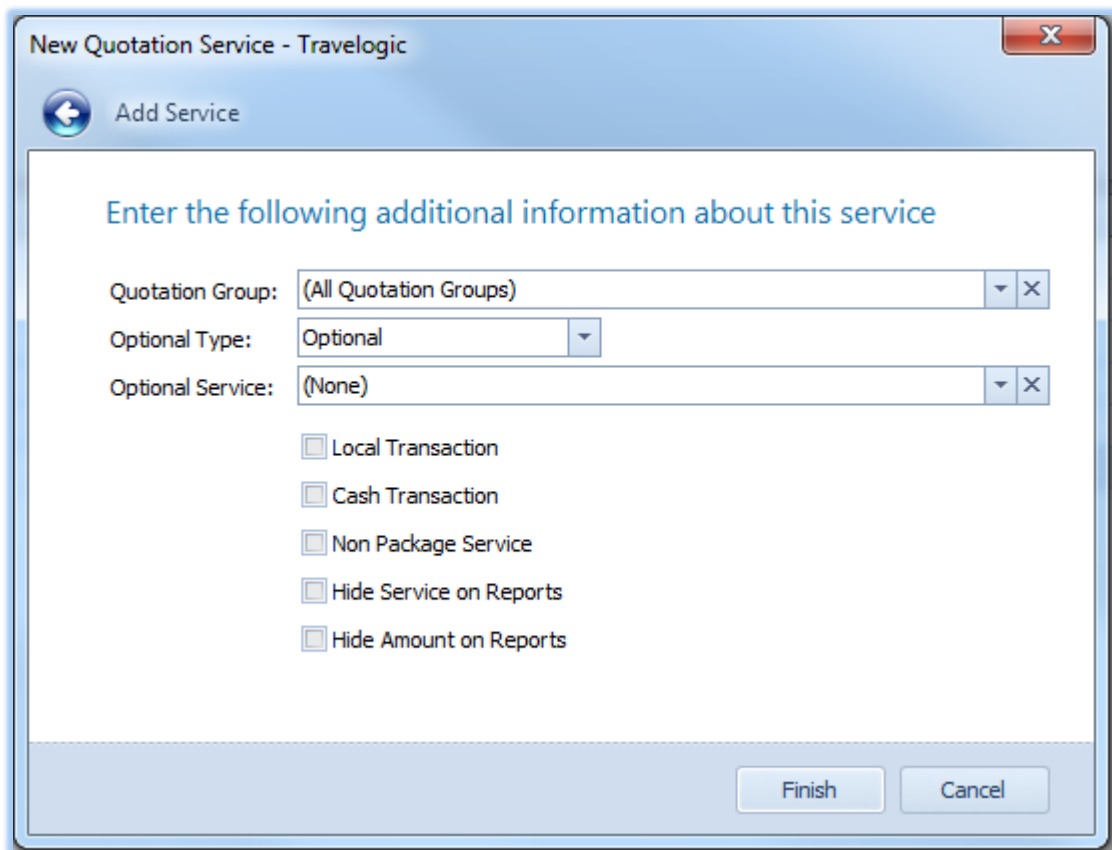
ZAR 610.50 More Per Sharing Person For 3 Nights

OPTIONAL SERVICES

Optional Service is most often applicable to tours and activities. The cost of this service is not included in the quote total, and the Report will display its price *separately*.

Once again, add a service as per normal:

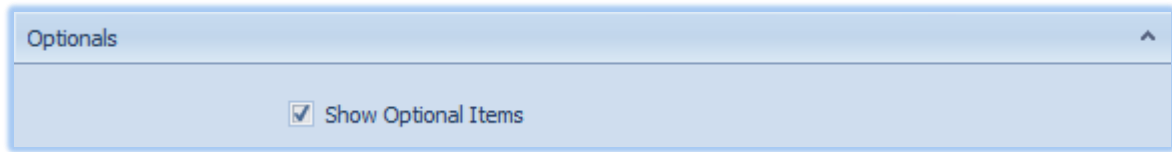
- Click **Add Service** as per normal
- Add details: **supplier**, **service**, start and end **dates**
- Select **Optional Type**: Optional
- **Optional Service**: you will not have to select an optional service



- Click **Finish** and allocate the Pax
- The service is added to the quote, and will display as a **light grey** colour to show that it is an **Optional** service.
- As it is an Optional Service, the price is not added to the total quote cost.



When running the **Quotation Report**, make sure you *tick Show Optional Items*, as follows:



Optionals

☒ Show Optional Items

The Optional Services will be displayed at the end of the report, along with the price, as follows:

Options

Accommodation

And/Or replace Cape Town Hotel - Standard Room with Fabulous Hotel - Luxury Room on 2013/06/18

ZAR 2,301.00 More Per Single For 3 Nights

ZAR 610.50 More Per Sharing Person For 3 Nights

Daily Tour

And/Or add Vita Tours - Private Full Day Cape Point & Peninsula Tour on 2013/06/17

ZAR 1,020.00 For Per Single For 1 Days

ZAR 1,020.00 For Per Sharing Person For 1 Days

Daily Tour

And/Or add Vita Tours - Private Full Day Cape Winelands Tour on 2013/06/18

ZAR 1,020.00 For Per Single For 1 Days

ZAR 1,020.00 For Per Sharing Person For 1 Days



Quotations with Children

When you are working with children in a Quotation, it is important to specify the Child's Age and most importantly, who the child is sharing with

Travellogic™ will calculate the Child's rate according to its age, and the rate rule attached to the service.

SETTING UP CHILDREN USING AUTO

- In the **Capture the Passengers** screen, click the **Auto** button and enter the number of Sharing and Single pax, including adults and children
- Select one of the passengers you've just added and double-click to edit:
 - Change the Passenger **Name**: *this will different children from the rest of the adult pax*
 - Change the Passenger **Group**: *this will indicate who the child is sharing with*
 - Enter the **Age** of the child: *this will ensure the correct child rates are applied*

SETTING UP CHILDREN USING NEW

- In the **Capture the Passengers** screen, click the **Auto** button and enter the number of Sharing and Single Adults only
- Click **New** to set up the child
 - Enter a **Name** for the child that will differentiate it from the rest of the pax
 - Select **Passenger Group** to indicate the passengers that the child will be sharing with
 - Enter the **Age** of the child to ensure accurate child rates are applied
 - *[Nationality, Gender, Passenger Type, Dietary Requirements, Contacts can also be edited at a later stage]*
 - Click **OK**



Passenger

General | Passport | Insurance | Medical Requirements | Notes | Flights

Name: Child 10 yrs

Passenger Group: Sharing Group 1

Age: 10

Nationality: United States

Gender: Male

Passenger Type: Standard

Dietary Requirements: Standard

Contact

Contact: ... ▲ X

Emergency Contact: ... ▲ X

OK Cancel

- You have now successfully captured **2 Adults** and a **Child aged 10**

New Request

New Request

Capture the passengers for this request

Name	Age
▼ Sharing Group 1	
▶ Sharing Adult 1	
Sharing Adult 2	
Child 10 yrs	10

Total: 3

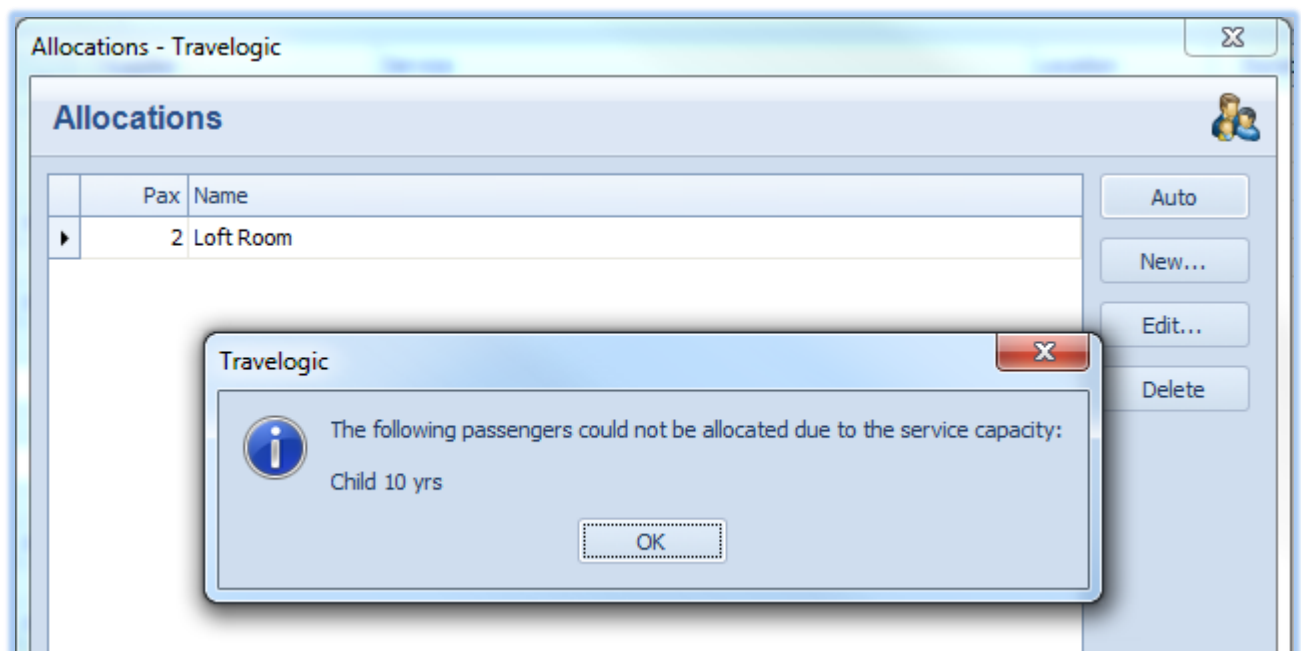
Auto
New...
Edit...
Shift Up
Shift Down
Delete

Next > Cancel

- Now add a service that **accepts children**
- This is what the Passenger Breakdown on the quotation screen will look like:

Service	Qty	Pax		Cost	GP	Sell	Total
▼ 2012/02/08							
▸ Standard Room	1	3	ZAR	1 480.00	20.00	1 776.00	1 776.00
Allocation				Cost	GP	Sell	
▸ Standard Room			ZAR	1 480.00	20.00	1 776.00	
Passenger				Cost	GP	Sell	
▸ Sharing Adult 1			ZAR	640.00	20.00	768.00	
Sharing Adult 2			ZAR	640.00	20.00	768.00	
Child 10 yrs			ZAR	200.00	20.00	240.00	

- The child rate is ZAR 200
 - If the child stays free of charge, the rate would be zero
- If you attempt to add a service that does **not accept children at all**, the following message will appear:



- This is a result of how the Adult & Child **Capacities** have been set up on the Supplier service
- You are able to **override the allocation** and **manually allocate** the child should you need to
 - (See the section on **Editing the Pax Allocation of a Service** on page 28)

Group Quotations

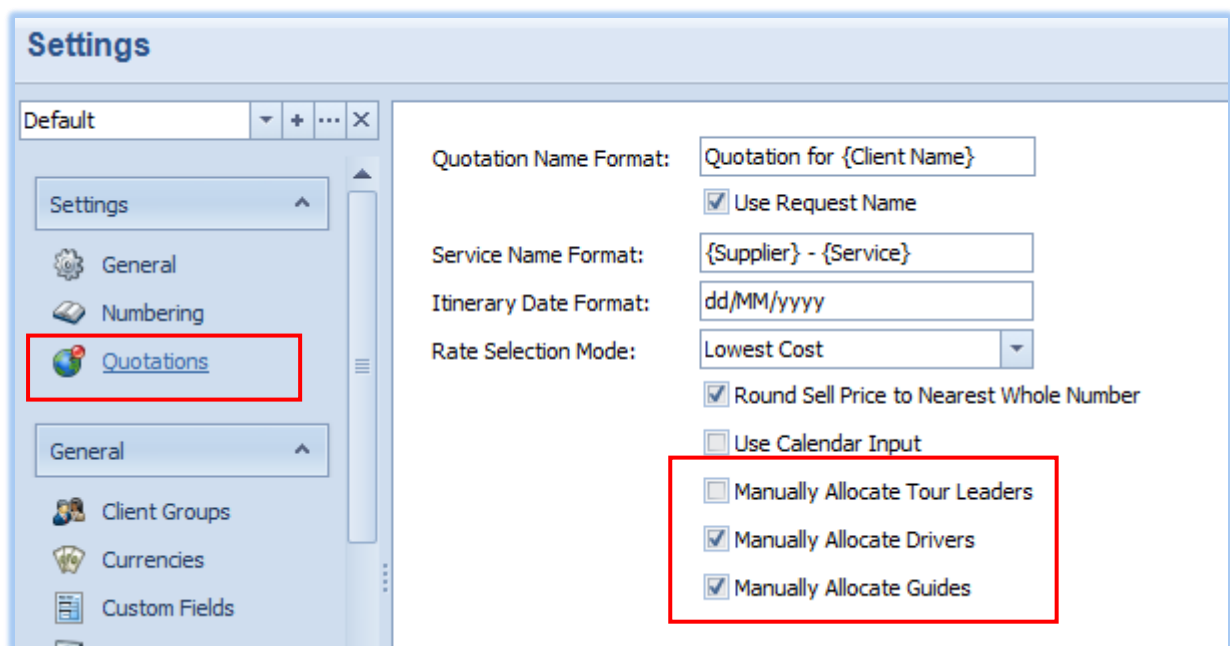
In this section, we will deal with quotations for **Groups** that include a **Driver**, **Guide** and/or **Tour Leader**

Before we start: Drivers, Guides and, even Tour Leaders on occasion, are not always included in all services of the quotation, e.g. transfers, entrance fees, local accommodation. We therefore recommend that you set up the way you would like Travellogic™ to handle the **allocation** of Tour Leaders, Drivers & Guides in **Settings** (bear in mind this might require a higher security level – please consult your Supervisor or Manager)

From your Travellogic™ Dashboard, click on File > Tools > Settings > Quotations:

You will see the following screen where you have the options to **Manually Allocate** Tour Leaders / Drivers / Guides

Manually Allocating means that the TL / Driver / Guide will be excluded from all services added to Quote and can be manually included as and when needed.



The screenshot displays the 'Settings' window for 'Quotations'. The left-hand navigation pane lists 'Settings' with sub-categories: 'General', 'Numbering', 'Quotations' (which is selected and highlighted with a red rectangle), and another 'General' section. The main content area on the right contains several configuration options. A red rectangle highlights a specific section of these options, which includes three checkboxes: 'Manually Allocate Tour Leaders' (which is unchecked), 'Manually Allocate Drivers' (which is checked), and 'Manually Allocate Guides' (which is checked). Other visible settings include 'Quotation Name Format' set to 'Quotation for {Client Name}', 'Service Name Format' set to '{Supplier} - {Service}', 'Itinerary Date Format' set to 'dd/MM/yyyy', 'Rate Selection Mode' set to 'Lowest Cost', and 'Round Sell Price to Nearest Whole Number' checked.

In the screenshot above, I have set it up so that the **Tour Leader** is automatically **allocated** to all services, as if he/she were a paying passenger

However, the **Driver** and **Guide** will be excluded from all the services and will have to be **manually** allocated to the relevant services in the Quotation ... this will be demonstrated further along in this document.



Let's create a new Group Quotation!

Create a New Request as per normal ... take into consideration the following factors that have bearing on **Group Quotations**:

1) Type of Request

When entering the request details, select **Group**, **Group Series** or **Incentive**

- a) This will serve to differentiate the different requests which is handy for reporting purposes
- b) Also your system can have profit settings based Request Types, so it is important to select the correct request type

New Request

New Request

Enter the following request details

Request Date: 4 September 2012

Type: Group

Request Name: FIT

Group Name: Group Series

Source: Incentive

Priority: High

Client Contact: (None)

Assigned User: Administrator

☐ Send Alert to Assigned User

Next > Cancel

2) Capture Passengers:

When capturing the passengers in your Request:

- a) Always ensure that you define both **Sharing** and **Single** Passengers in order to output a sharing and single rate for your quotation, *even though you may not know the exact number of sharing and single pax at the time of quoting*



- b) In addition to paying passengers, also capture the **Tour Leaders, Drivers and Guides** according to the requirements of your group; *the costs incurred for Tour Leader, Driver and Guide passengers are shared by the number passengers in the quotation*

To Illustrate:

In our group, we have a Group of 20 pax plus a Tour Leader, Driver and a Guide

- *We will split the number of paying pax into Sharing and Singles*
- *We have entered 1 Tour Leader, 1 Driver and 1 Guide*

Category	Value
Total Sharing:	18
Total Single:	2
Tour Leaders:	1
Drivers:	1
Guides:	1

Click OK and continue with your Quotation, adding services as normal ...

3) Allocation of Tour Leaders, Drivers and Guides

You will recall that we have set up the Tour Leaders and/or Drivers & Guides to be **excluded** from services

This is how you can **Manually Allocate** Tour Leaders, Drivers and Guides to services:



- When **Adding Services** to the quotation, switch to the **Details** tab and **un-tick** the boxes to **include** the Tour Leaders, Drivers and Guides in the service, as follows:

Add Service

General **Details** Notes Rates Supplier Allocations

Quotation Group: (All Quotation Groups) ▼ X

Optional Type: None ▼

Optional Service: (None) ▼ X

☐ Charge On First Day Only

☐ Local Transaction

☐ Cash Transaction

☐ Non Package Service

☐ Hide Service on Reports

☐ Hide Amount on Reports

☒ Allocate Max Pax

☐ Manually Allocate Tour Leaders

☐ Manually Allocate Drivers

☐ Manually Allocate Guides

- Click **OK** to continue adding the service to the quote
- In the following **Allocations** screen you will note that the Tour Leader, Driver and Guide has each been allocated to the service
- On the Quotation screen, the **Quantity** and Pax **columns** will clearly indicate to which services the Tour Leader, Driver & Guide has been allocated:

Day	Service	Qty	Pax	D	G	T
▼ Friday, 09 August 2013						
⊕ 1	Travelwell Coaches - Transfer from Airport to Hotel in a 22-Seater	1	20	0	0	1
⊕ 1	Montrose City Hotel - Standard Room	12	20	0	0	1
⊕ 1	Guide fees - Transfer	1	20	0	0	1
▼ Saturday, 10 August 2013						
⊕ 2	Travelwell Coaches - Overland in a 22-Seater	1	20	0	0	1
⊕ 2	Marvel Country Lodge - Standard Cottage	14	20	1	1	1
⊕ 2	Lovely Picnic Lunch en route	1	20	1	1	1
⊕ 2	Guide fees - Overland	1	20	0	0	1



- These settings are **saved** with the service which means that should you Refresh Allocations for the quotation/service, the Tour Leader, Driver and Guide will remain included in the service
- When **Editing a Service**, once it has already been added to the quote:
- Double click the service and go to the **Options** tab
- **Un-tick** Manually Allocation Drivers / Guides

Service

Service Allocations Reservation Notes Open Supplier

Show Actions

General Details **Options** Descriptions Wetu

Quotation Group: (All Quotation Groups)

Optional Type: None

Optional Service: (None)

☐ Local Transaction

☐ Cash Transaction

☐ Non Package Service

☐ Hide Service on Reports

☐ Hide Amount on Reports

☒ Allocate Max Pax

☐ Manually Allocate Tour Leaders

☐ Manually Allocate Drivers

☐ Manually Allocate Guides

- Now tick the **Refresh Rates** button in order for the settings to take effect

Group Quotation with Multiple Options

By using **Quotation Groups**, Travellogic™ enables you to quote on multiple options within the quotation:

- 1) multiple group sizes,
- 2) multiple travel dates / seasons (as in the case of group series), or even
- 3) a combination of both

SETTING UP MULTIPLE GROUP SIZES

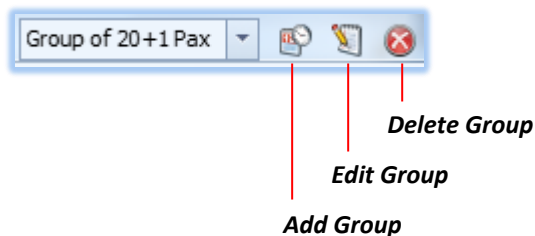
You will be able to set up multiple groups **with different sizes within the same Quotation**:

e.g. Group of 20, 30 and 40 Pax

Each group will share the same itinerary and services except where the vehicle sizes differ

Let's first set up the various group sizes:

- Create a new Request as per normal, setting up your **first Group** (Group of 20) in the process
- Go to the **top right-hand side** of the Quotation screen to set up the rest of the groups – this is what you will find:



- Click on the **Add Group** button to create the second Group, as well as any subsequent groups.
 - Enter the **Name** of the Group
 - Enter the **Start Date** (*should be the same as the first group*)



General

Name: Group of 30 + 1 Pax

Start Date: 4 September 2012

10 February 2012

September 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

- Click on the Passengers button, and insert the Pax for this group: 30 + 1

Auto Generate Passengers - Travelogic

Auto Generate Passengers

Total Sharing: 28

Total Single: 2

Tour Leaders: 1

Drivers: 1

Guides: 1

OK Cancel

- Click Add Group to create the next Group, 40 + 1
- You will now see a **list** of the groups you created and also be able to **switch** from one group to another:

Group of 20+1 Pax

Name	Date
Group of 20+1 Pax	4 September 2012
Group of 30 + 1 Pax	4 September 2012
Group of 40 + 1 Pax	4 September 2012

Let's add services to our Quotation:

TRANSPORT SERVICES

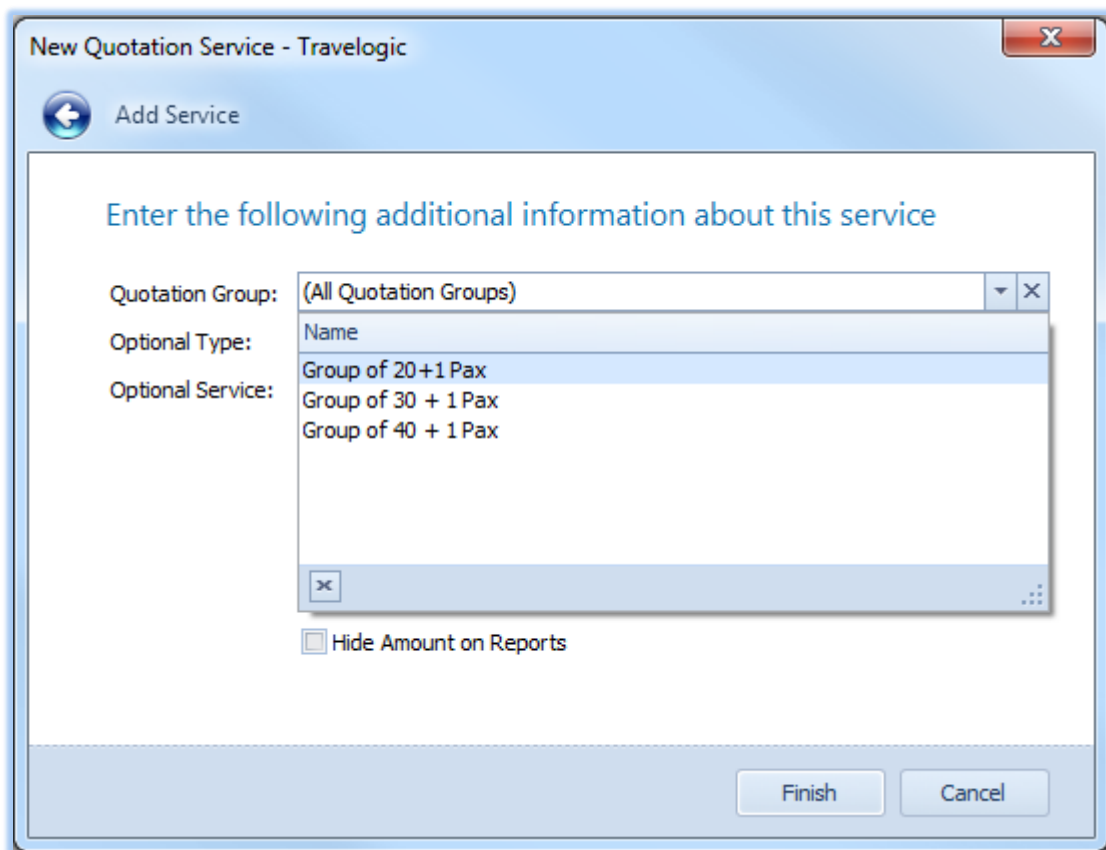
- When adding transport services, due to the **various group sizes** in the quotation, you will need to add different vehicle sizes to each group
- Do this by **allocating** each vehicle size to the applicable quotation group

Let's illustrate this:

We have 3 Groups of 20+1, 30+1 and 40+1 pax

We have 2 vehicle sizes to accommodate our groups: 30-Seater and 44-Seater

- Click **Add or Find Services**, select the 30-seater vehicle
- Now click on the **Details** tab, and from the **Quotation Group** drop down, **select Group of 20 + 1**



This service will only be added to the Group 20+ 1.

*Go to **Groups of 30+1** and **40+1** – note this service has **NOT** been added to these itineraries*

- Now let's add the next vehicle: **44-Seater**, which accommodates both groups, 30+1 and 40+1
- In the **Find Services** screen select the 44-Seater and allocate it to **Group of 30+1**



- **Repeat** by selecting the 44-Seater again and allocating it to **Group of 40+1**

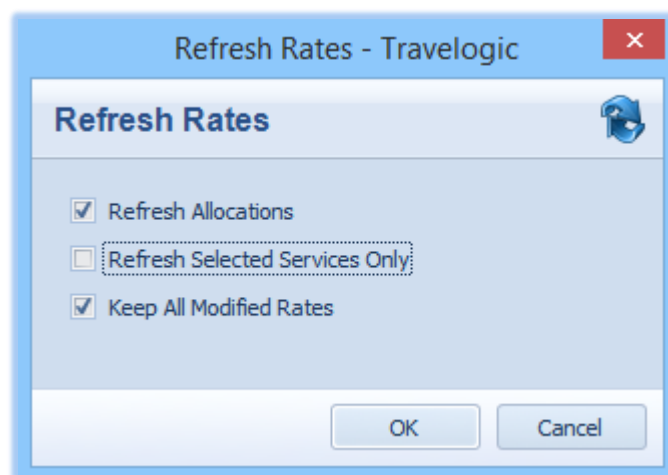
Switch from one group to another to ensure the services has been allocated to the correct group

ACCOMMODATION & OTHER SERVICES

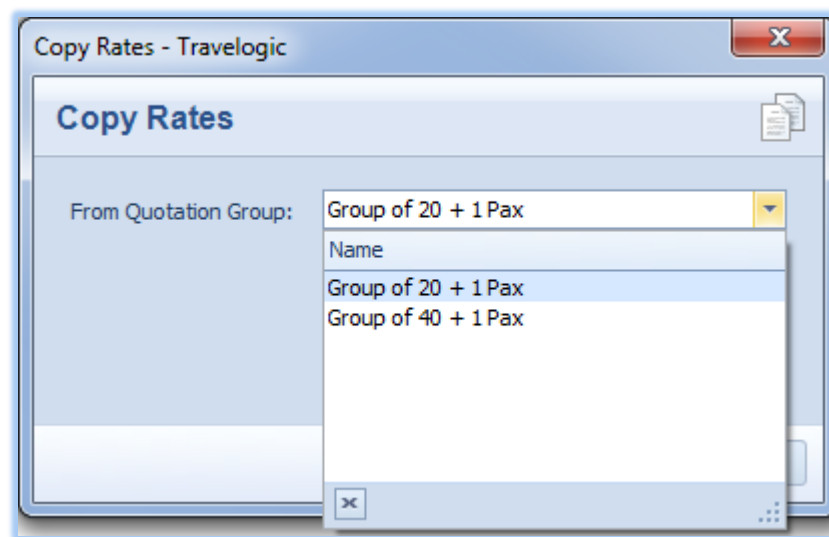
- When adding the **rest** of the services, you do not have to select a quotation group – these services will then apply to **All Quotation Groups**

COPYING SERVICES & RATES FROM ONE GROUP TO ANOTHER

- After you have completed the itinerary by adding all the services required, switch to each Quotation Group and click **Refresh Rates** to allocate the services to those groups
 - Ensure the **Refresh Allocations** box is ticked
 - **Un-tick** Refresh Selected Services only



- Should you have add any Ad Hoc Quotation Services and manual rates, click on the **Copy Rates** button to copy these rates from one group to another **
 - Click on the drop down list to select which group to copy rates from



**** Please note that the Copying of Ad Hoc rates is limited:**

- When Adding the ad hoc quotation service, ensure that you select the **Basis Type** (Per Person or Per Unit), as this will be used to determine what kind of rate is being copied
- Based on this, Travellogic™ can only copy **Per Person** or **Per Unit** rates and cannot take into account specific passenger or allocation rates, as there is no way of matching these from one group to another
- This Copy Rates function can only work **effectively** if have applied the **same rate** to each passenger, regardless of whether it is Per Unit or Per Person, i.e.:
 - *If it is a Per Unit rate of say ZAR 10,000, it will copy the same rate of ZAR 10,000 to the second group, regardless of whether the group size has changed*
 - *If it is a Per Person rate of say ZAR 50, it will copy the same rate of ZAR 50 to all passengers in the new group*

In summary:

- *when you add a service to a Specific quotation group, the service will be added to that group only*
- *when you add a service to All quotation groups,*
 - *the service will be added to all groups*
 - *the rates will be included for the group you have added it to / that is active, but*
 - *the rates will be excluded for the rest of the groups; you can activate the rates by clicking refresh rates*



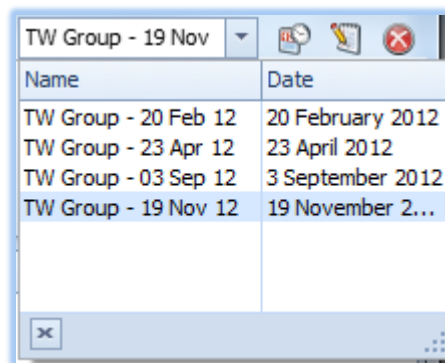
SETTING UP MULTIPLE TRAVEL DATES

This functionality will assist you in quoting on the same itinerary for different dates / validity periods in the year. This is most often used in connection with Group Series tours.



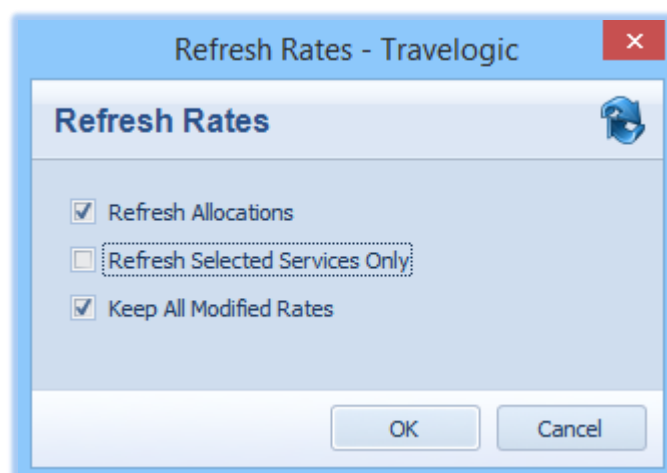
Click on the **Add Group** button to create the new group. *(Remember you will have created your first group when you created the New Request)*

- Enter the **Name** and the travel **Date**
- Click on **Passengers** and enter the pax for this group
- Repeat until you have set up all the groups required for your quote



Name	Date
TW Group - 20 Feb 12	20 February 2012
TW Group - 23 Apr 12	23 April 2012
TW Group - 03 Sep 12	3 September 2012
TW Group - 19 Nov 12	19 November 2...

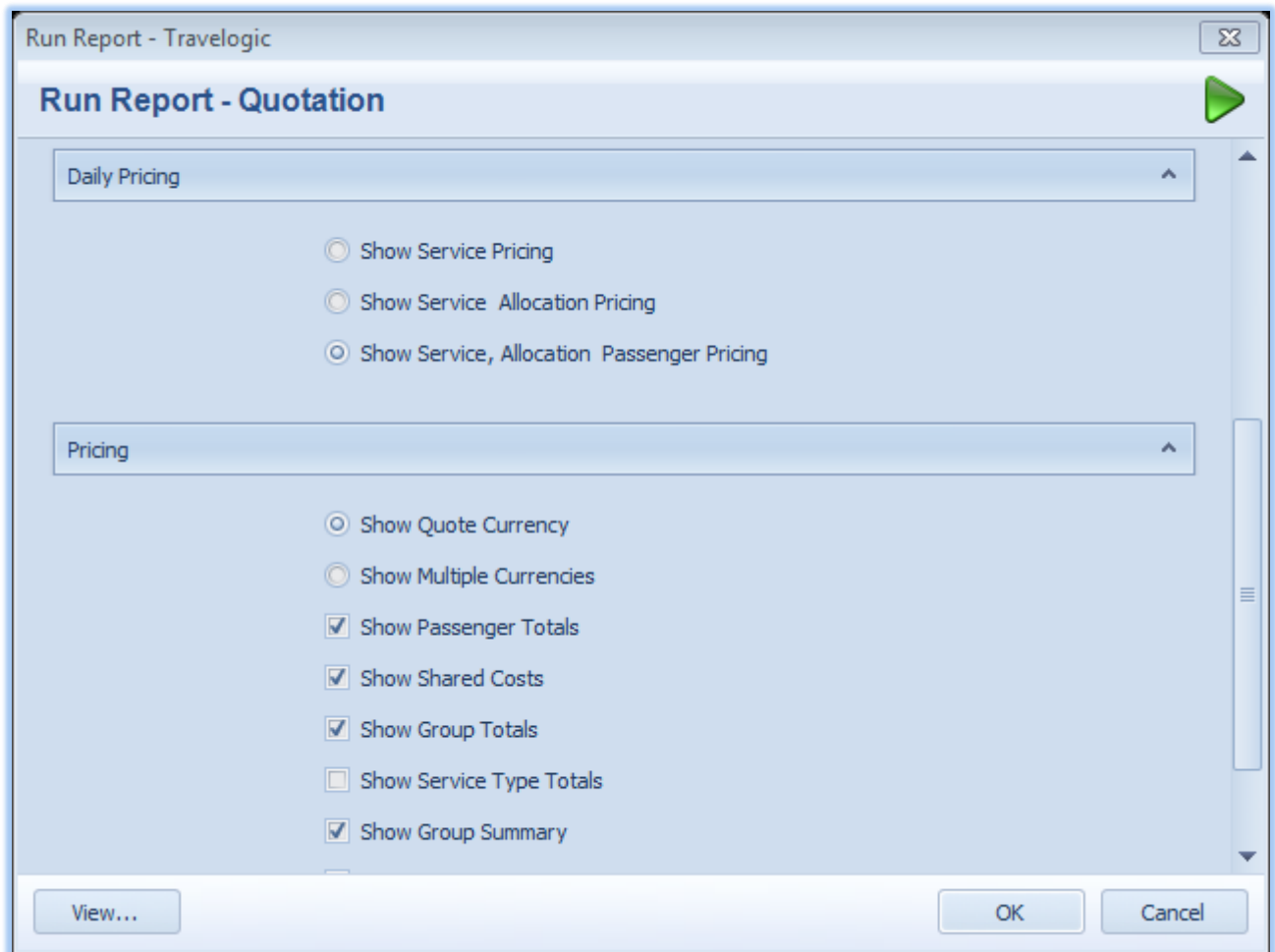
- **Add Services** to your quotation as per normal
- Make sure you go to **each** Quotation Group and **Refresh Allocations**



Report Options for GROUP Quotes

Use the following options when running reports for Group quotes / bookings:

Quotation Report:



Run Report - Travelogic

Run Report - Quotation

Daily Pricing

- ☐ Show Service Pricing
- ☐ Show Service Allocation Pricing
- ☒ Show Service, Allocation Passenger Pricing

Pricing

- ☐ Show Quote Currency
- ☐ Show Multiple Currencies
- ☒ Show Passenger Totals
- ☒ Show Shared Costs
- ☒ Show Group Totals
- ☐ Show Service Type Totals
- ☒ Show Group Summary

View... OK Cancel

- In the **Daily Pricing** section, select **Show Service, Allocation & Passenger Pricing**
- **Show Group Summary** summarises the Passenger Totals into Per Person Sharing and Per Single prices
 - *This also summarises the Service pricing into Per Unit (i.e. coach and guide services) and Per Person (i.e. meals, entrance fees and flights), as applicable*
- **Show Group Totals** shows all the Per Person Sharing and Per Single prices of ALL the Quotation Groups
- **Show Shared Costs** shows the total cost incurred by the Tour Leader, Driver and Guide (the costs that are shared by the number of paying passengers)

**Example of the Quotation Report, showing Cost Price*, Passenger Pricing and Group Summary:****Quotation**

CONSULTANT	Tamsin Mathews			REQUEST REFERENCE	R100077			
REQUEST	Group Quote			GROUP NAME	10-14 Pax			
QUOTE	Group Quote			QUOTE REFERENCE	Q100096			
QUOTE STATE	Package			DATE OF QUOTE	2013/03/20			

Service	QTY	PAX	Basis	CUR	COST	GP	SELL	TOTAL
Day 1 Tuesday 17 September 2013								
Travelwell Coach Charter - Half Day 15 Seater	1			ZAR	1,750.00	12.00	1,960.00	1,960.00
Guide fees - Guide fee - Half Day	1			ZAR	1,000.00	13.00	1,130.00	1,130.00
Cape Town Hotel - Standard Room	7							
Per Sharing Person		8	BB	ZAR	605.00	12.07	678.00	5,424.00
Per Tourleader		1	BB	ZAR	1,050.00	12.00	1,176.00	1,176.00
Per Single		2	BB	ZAR	1,050.00	12.00	1,176.00	2,352.00
Day 2 Wednesday 18 September 2013								
Travelwell Coach Charter - Full Day 15 Seater	1			ZAR	2,350.00	12.00	2,632.00	2,632.00
Guide fees - Guide fee - Full Day	1			ZAR	1,950.00	12.36	2,191.00	2,191.00
Entrance fees - Table Mountain Cableway		10		ZAR	247.50	12.44	278.30	2,783.00
Lovely picnic lunch en route		10		ZAR	137.50	12.00	154.00	1,540.00
Entrance fees - Cape Point		10		ZAR	110.00	13.00	124.30	1,243.00
Cape Town Hotel - Standard Room	7							
Per Sharing Person		8	BB	ZAR	605.00	12.07	678.00	5,424.00
Per Tourleader		1	BB	ZAR	1,050.00	12.00	1,176.00	1,176.00
Per Single		2	BB	ZAR	1,050.00	12.00	1,176.00	2,352.00

Price Per Passenger	CUR	COST	GP	SELL	PROFIT
Per Single	ZAR	13,083.40	13.73	15,164.90	2,081.50
Per Sharing Person	ZAR	9,804.40	14.68	11,490.90	1,686.50
Quotation Total	CUR	COST	GP	SELL	PROFIT
	ZAR	173254.00	10.80	194236.00	20,982.00

*** Note that the Show Cost option also gives a breakdown of GP and sell per Service, as well as Passenger & Quotation Totals; this option is recommended for Internal company use only.**

**Example of the Quotation Report, showing Sell Price only, Passenger Pricing and Group Summary:****Quotation**

CONSULTANT	Tamsin Mathews	REQUEST REFERENCE	R100077
REQUEST	Group Quote	GROUP NAME	10-14 Pax
QUOTE	Group Quote	QUOTE REFERENCE	Q100096
QUOTE STATE	Package	DATE OF QUOTE	2013/03/20

Service	QTY	PAX	Meal Basis	CUR	Price	TOTAL
Day 1 Tuesday 17 September 2013						
Travelwell Coach Charter - Half Day 15 Seater	1			ZAR	1,960.00	1,960.00
Guide fees - Guide fee - Half Day	1			ZAR	1,130.00	1,130.00
Cape Town Hotel - Standard Room	7					
Per Sharing Person		8	BB	ZAR	678.00	5,424.00
Per Tourleader		1	BB	ZAR	1,176.00	1,176.00
Per Single		2	BB	ZAR	1,176.00	2,352.00
Day 2 Wednesday 18 September 2013						
Travelwell Coach Charter - Full Day 15 Seater	1			ZAR	2,632.00	2,632.00
Guide fees - Guide fee - Full Day	1			ZAR	2,191.00	2,191.00
Entrance fees - Table Mountain Cableway		10		ZAR	278.30	2,783.00
Lovely picnic lunch en route		10		ZAR	154.00	1,540.00
Entrance fees - Cape Point		10		ZAR	124.30	1,243.00
Cape Town Hotel - Standard Room	7					
Per Sharing Person		8	BB	ZAR	678.00	5,424.00
Per Tourleader		1	BB	ZAR	1,176.00	1,176.00
Per Single		2	BB	ZAR	1,176.00	2,352.00

Price Per Passenger	CUR	SELL
Per Single	ZAR	15,164.90
Per Sharing Person	ZAR	11,490.90
Quotation Total	CUR	SELL
	ZAR	194236.00

**Example of the Quotation Report, showing Group Totals:**

Group Totals			
10-14 Pax			
	Price Per Passenger	CUR	SELL
	Per Single	ZAR	15,164.90
	Per Sharing Person	ZAR	11,490.90
	Quotation Total	CUR	SELL
		ZAR	122,257.00
15-19 Pax			
	Price Per Passenger	CUR	SELL
	Single Adult1	ZAR	16,378.13
	Sharing Adult1	ZAR	12,704.13
	Quotation Total	CUR	SELL
		ZAR	194,236.00
20-24 Pax			
	Price Per Passenger	CUR	SELL
	Single Adult1	ZAR	13,179.10
	Sharing Adult1	ZAR	9,505.10
	Quotation Total	CUR	SELL
		ZAR	197,450.00

**Itinerary Report:**

- **Summarise Pricing** summarises the Passenger Totals into Per Person Sharing and Per Single prices
- **Show Group Totals** shows all the Per Person Sharing and Per Single prices of ALL the Quotation Groups

For Example:**10-14 Pax**

Price per Passenger	CUR	Amount
Total for Single Adult 1	ZAR	15,164.90
Total for Sharing Adult 1	ZAR	11,490.90

15-19 Pax

Price per Passenger	CUR	Amount
Total for Single Adult 1	ZAR	16,378.13
Total for Sharing Adult 1	ZAR	12,704.13

20-24 Pax

Price per Passenger	CUR	Amount
Total for Single Adult 1	ZAR	13,179.10
Total for Sharing Adult 1	ZAR	9,505.10



Creating and Using Packages

Travellogic™ allows you to create a package; an itinerary or set of services that can be used over and over again for future quotations and bookings.

1 : CREATING AN ITINERARY

- Create a **New Request**
 - If you are creating the package for a certain Agent, use the agent as your Client
 - However if you are creating a general package, set up your company as the client or create a general client, i.e. set up a client called Package Tours to use for all future packages
- Build up an **Itinerary** that you would like to use for your package
- Remember to use **multiple quotation groups** to set up the package for various group sizes

2 : SETTING UP THE PACKAGE

- Click on orange File button in the top left hand corner of the Quotation and select **Settings**
- Select the **Package** tab and tick the box labelled “**Use Quote As Package**”
- Complete the rest of the Package screen as follows

It is not compulsory to add the following information however supplying this information will make it easier when searching for and using the package in a quotation

- Name the **Package**; be sure to use a name that will define this package and easily distinguish it from other packages
- The package **Number** will be *automatically generated* by Travellogic™
- Enter or Select a **Category**
- Select the **State** of your package, Active or Inactive, to indicate whether the package is available to be used in a quotation or not
- Select the **Meal Basis**, if applicable
- Select the applicable **Location** for your package
- Enter a brief **description** containing keywords that are relevant to your package
- Enter the **Validity Dates** of the package: the package can only be used if the Start Date of the quotation falls within the To and From date of the package
- Enter the **Expiry Date**: this is the actual date the package is no longer in use, regardless of the start date of the quotation



Settings - Travellogic

Settings

General Details **Package** Custom Fields Notes

☒ Use Quote As Package

Name: Cape Town, Garden Route and Safari 11 da

Number:

Category:

State: Active

Meal Basis: (None)

Location: South Africa

Description: Self-drive package: 4nts CPT, 2nts Winelands, 3nts Knysna, 2nts Safari

Availability

From Date:

To Date:

Expiry Date:

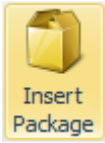
OK Cancel

- Click OK

We also recommend that you change the **State** of both the quotation and the request to Package to distinguish it from the other quotations and requests in Travellogic™.



3 : USING THE PACKAGE



Now that you have created the template, you can insert it into a Quotation as follows:

Click on the Insert Package button which you will find at the top of the Quotation Screen

- Enter a **Keyword** relating the name, description or number of the package that you would like to insert;
all packages containing this keyword will appear in the results
- Select a **Category**, if applicable
- Select a **Location** to see all of the packages with the specified location
- Insert a **From** or **To** Date for the package; the results will include all packages within these Validity Dates
- You may also indicate a **Meal Basis** if applicable to your package
- You may also search for packages that are **Inactive**. i.e. the Validity Dates do not match the Start Date of your Quotation

The screenshot shows a software window titled "Find Package - Travellogic". It features a toolbar with three icons: a magnifying glass labeled "Search", a green plus sign labeled "Add to Itinerary", and a notepad icon labeled "Edit Package". Below the toolbar are two tabs: "Actions" and "Package". The "Search Criteria" section on the left includes fields for "Keywords" (containing "safari"), "Category" (empty), "Location" (set to "(All Locations)"), "From Date" (empty), "To Date" (empty), "From Price" (set to "0,00"), "Meal Basis" (set to "(Any)"), "State" (set to "Active"), and a "Search" button. The "Package" tab on the right displays a table with the following data:

Package	Name	Category	Location	Description
P100007	Cape Town, Garden Route and Safari 11 days		South Africa	Self-drive pac...



The **Edit Package** button will take you directly to the Quotation that the package is based on.

Select the package you would like to insert by double-clicking or clicking on the “Add to Itinerary” button – the following screen will appear:

	Service	Duration
▼ 1		
☒	Travelwell - Transfer Cape Town Airport - Hotel 07 Seater	1
☒	Dock Road Hotel & Spa - Suite	3
▼ 2		
☒	Travelwell - Half day City Tour (AM/PM)	1
▼ 4		
☒	Anytime Car Hire- Group C (Toyota Corolla 1.6 or similar)	8
☒	Mount Pleasant Hotel - Classique Suite	2
▼ 6		
☒	St Jude of Knysna - Deluxe Suites	3
▼ 9		
☒	Impala Water Lodge - Bush Chalet	2

- Carefully select the **Day** or **Date** the package needs to be inserted on
- You may also select which **Quotation Group** you would like to insert the package into
- Under **Package Options**, select which **package group** size, if applicable, you would like to insert
- In the main body of the screen, view a summary of the package services
- You are also allowed to **de-select** which of these services you do not want to include in your Itinerary
- Click **OK**
- The package will be added to your quotation: ***all services will be refreshed based on the date and pax size of your quotation***

Editing Passenger Information

Before sending email booking requests for the services in your quote, capture your passenger information so that it will pull through onto the email requests, as well as the following reports:

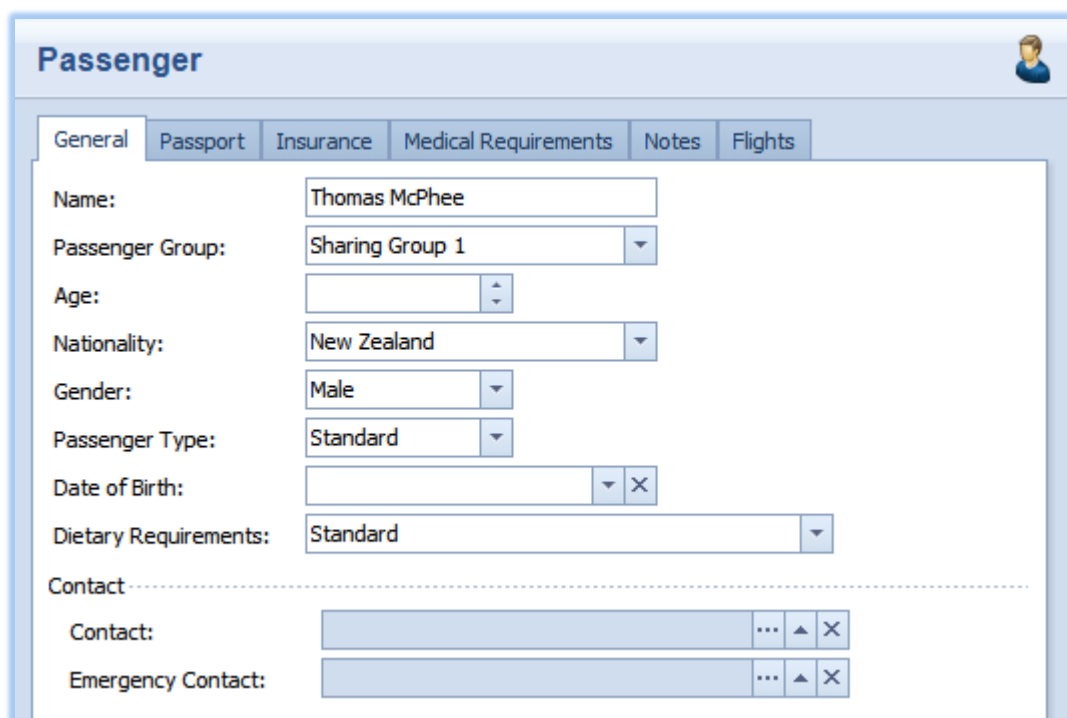
- Customer Invoice
- Itinerary & Vouchers
- Booking Sheets



In the top right-hand screen of the Quotation click on **Edit Quotation Group**, then **Passengers**

Select one and double click or click **Edit ...**, and complete/edit the following information:

- **General:**
 - Enter / edit the **Name, Age, Nationality, Gender** and **Date of Birth**
 - **Be careful to only add Ages to child passengers**
 - Click on the dropdown to select the **Dietary Requirements**, if applicable
 - Click on the  to Search & Select or Add a New **Contact** as well as an **Emergency Contact**
Once the contacts have been added to these fields, use the:
 - Arrow button  to open and/or edit the Contact
 - X button  to clear / de-select the Contact
- Click on each of the following tabs to add the **Passport, Insurance, Medical Requirements, Notes** and **Flight** details that may apply to this passenger



Passenger

General | Passport | Insurance | Medical Requirements | Notes | Flights

Name: Thomas McPhee

Passenger Group: Sharing Group 1

Age:

Nationality: New Zealand

Gender: Male

Passenger Type: Standard

Date of Birth:

Dietary Requirements: Standard

Contact

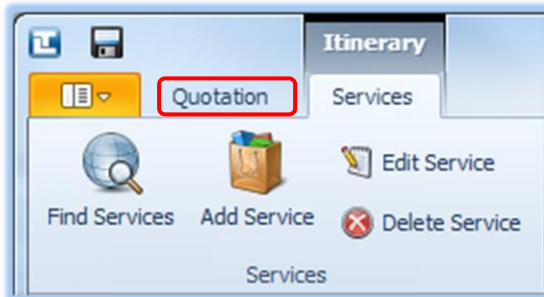
Contact:

Emergency Contact:

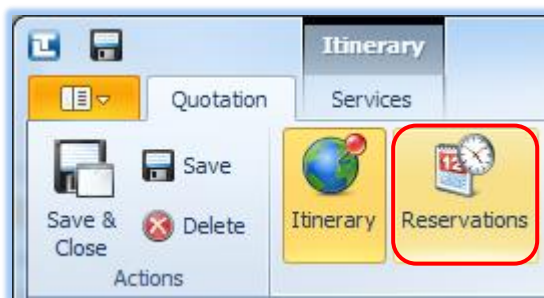


Reservations

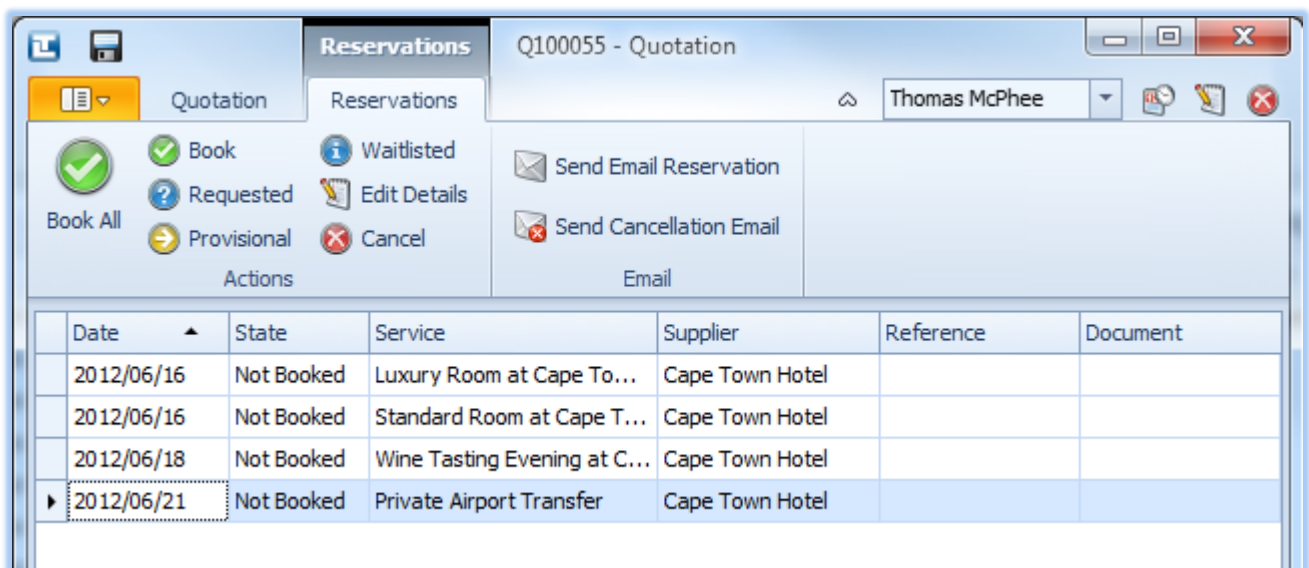
To start booking your services, click on the **Quotation** tab:



Once on the Quotations tab, click on **Reservations**:



You will see the following screen with a list of your quoted services:





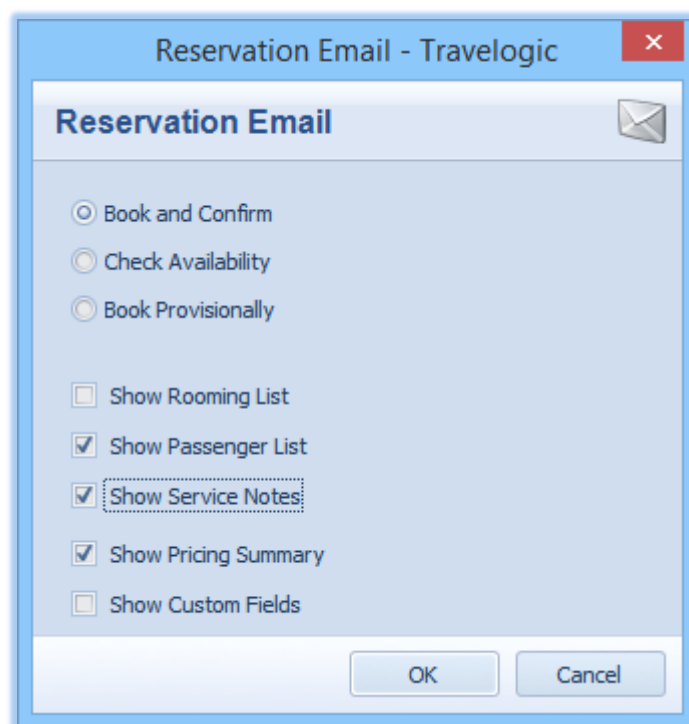
MAKING A RESERVATION



Click on **Send Email Reservation** button

This will **automatically generate** an Outlook Email to the Supplier, using the default Reservation Contact email address

- You will have the option of **Checking Availability** only, or booking on a **Provisional** or **Confirmed** basis
- You may also select to show the **Rooming or Passenger List**, **Service Notes**, **Pricing Summary** or any **Custom Fields** you have added



- *The email has all the information required to make a booking with the supplier, including passenger info*
- *All of the services are with the same supplier, therefore they all appear in the email*
- *As it is a regular Outlook email you are welcome to add or edit any of the information*
- *Once sent, the email will be stored in your Sent Items folder, as well as in the Email section of the Quotation*



 Send	To...	res1@capetownhotel.co.za
	Cc...	
	Bcc...	
Subject		Book and Confirm: Thomas McPhee , Q100095

Dear Cape Town Hotel,

Please book and confirm the following:
Client: Thomas McPhee

Supplier Name: Cape Town Hotel

Total number of pax: 4
Start Date: 16 Jun 2013
End Date: 16 Jun 2013
Service: Cape Town Hotel - Private Airport Transfer x 1
Notes: off SA123 arr. at 15h00

Total Cost:1230,00

Total number of pax: 4
Date In: 16 Jun 2013
Date Out: 19 Jun 2013
Service: Cape Town Hotel - Standard Room x 2
Number of rooms: 1 Double/Twin, 1 Single(s)
Meal Basis: Bed and Breakfast

Total Cost:5580,00

Name: Wilfred Owen
Nationality: New Zealand
Dietary Requirements: Standard

Name: Thomas McPhee
Nationality: New Zealand
Dietary Requirements: Standard

Name: Audrey McPhee
Nationality: New Zealand
Dietary Requirements: Standard



Once you have sent your email, note that the **State** of the service has changed from Not Booked to **Requested**:

	Date ▲	State	Service	Supplier	Reference	Document
▶	2012/06/16	Requested	Luxury Room at Cape To...	Cape Town Hotel		
	2012/06/16	Requested	Standard Room at Cape T...	Cape Town Hotel		
	2012/06/18	Requested	Wine Tasting Evening at C...	Cape Town Hotel		
	2012/06/21	Requested	Private Airport Transfer	Cape Town Hotel		

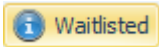
Once you have received confirmation from the supplier, click  or  (based on the status with the supplier)

Enter a **Reference** (reservations number) in the appropriate field

Note that the service **State** has changed to **Confirmed** or **Provisional**

SERVICE STATES

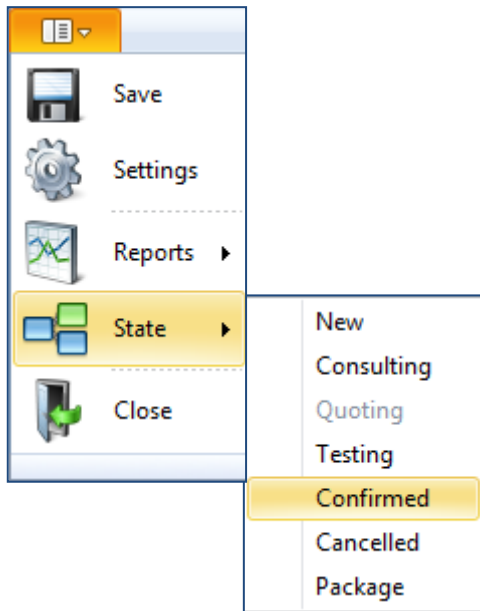
Make use of these buttons found in the Ribbon at the top of the Reservation Screen to **update / amend** the State of your services, as needed:

	Book All the services simultaneously <i>Note that you will still have to update the Reference on each service individually</i>
	Use this button to change the State of the service to Requested , without sending the email request
	Use this button to indicate that a service is Waitlisted
	Use this button to Cancel a service. <i>The State of the service reverts to Not Booked</i>

QUOTATION STATES

The State of your Quotation will also need to be updated:

Click on the Orange **File Button** in the top left-hand corner of your screen; click **States**



Quoting is the current active state of the Quotation, therefore it is greyed out

Now simply select the state that you wish to update to. In this case the logical selection would be **Confirmed**

Quotation States, as well as Request States are set up in the General Settings of Travellogic and can be customised to suit the requirements of the company. States can also be set up so that when you update the state of a Quotation, it would automatically update the state of the Request, or vice versa.

MAKING USE OF SUPPLIER ALLOCATIONS

When **Adding** a Service to your quotation, you would have clicked on the Supplier Allocations tab to check whether allocations apply and if there are any are available:

This screen indicates:

- the **Dates** you are booking, as well as the **Validity Date** of the allocation
- the **Quantity**, the number of units or rooms on allocation
- the number of units or room that have already been **Used** or booked on allocation
- the number of units of rooms that are still **Available**



Add Service - Travelogic

Add Service

General Details Notes Rates Supplier Allocations

Allocation	Type	Quantity	Used	Available
▶ ✓ 2012/06/16				
Standard Room , 01 Jan-31 Dec	Units	3	0	3
▼ 2012/06/17				
Standard Room , 01 Jan-31 Dec	Units	3	0	3
▼ 2012/06/18				
Standard Room , 01 Jan-31 Dec	Units	3	0	3

OK Cancel

In order to book the service on Allocation, go to the **Reservations** screen:

- **Highlight** the service
- Click the **Check Availability** button
- In the Supplier Allocation Screen, you will an additional column showing the number of units or rooms you **Require**



Supplier Allocations - Travelogic

Supplier Allocations

Allocation	Type	Quantity	Used	Required	Available
▼ 2012/06/16					
Standard Room , 01 Jan-31 Dec	Units	3	0	1	3
▼ 2012/06/17					
Standard Room , 01 Jan-31 Dec	Units	3	0	1	3
▼ 2012/06/18					
▶ Standard Room , 01 Jan-31 Dec	Units	3	0	1	3

OK Cancel

- Highlight the dates you require and click **OK**
- You will notice the service state has automatically changed to **Confirmed**
- Double click the service and click on the **Supplier Allocations tab**
- The **Quantities** column will indicate the number of units or rooms you have booked on allocation:



Allocation	Quantity
▼ 2012/06/16	
Standard Room , 01 Jan-31 Dec	1
▼ 2012/06/17	
Standard Room , 01 Jan-31 Dec	1
▼ 2012/06/18	
Standard Room , 01 Jan-31 Dec	1

Partial Allocation:

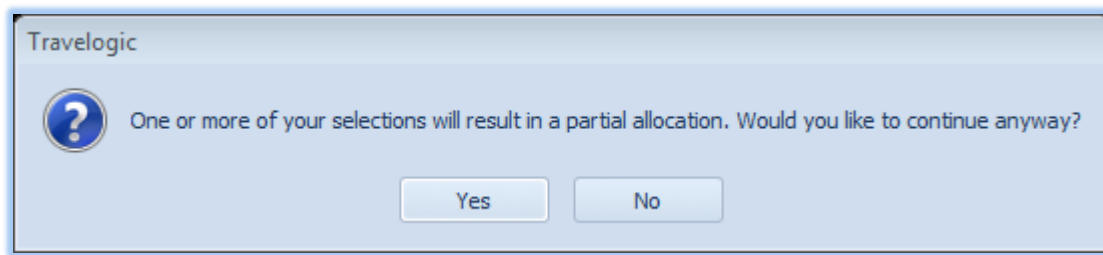
- You will not be able to take allocation when there are no rooms or units available
- However, you will be able to take allocation if **part** of your allocation is available

To Illustrate

In this scenario you require 2 rooms but there is only 1 available:

Allocation	Type	Quantity	Used	Required	Available
▼ 2012/06/16					
Standard Room , 01 Jan-31 Dec	Units	3	2	2	1
▼ 2012/06/17					
Standard Room , 01 Jan-31 Dec	Units	3	0	2	3
▼ 2012/06/18					
Standard Room , 01 Jan-31 Dec	Units	3	0	2	3

When you attempt to take the allocation, the following warning message will alert you, and prompt you to continue or not:



*If you click Yes, the allocation will be taken, and the service state will change to **Partially Allocated***

Date	State	Service	Supplier
2012/06/16	Partially Allocated	Standard Room at Cape Town Hotel	Cape Town Hotel

*It is up to you **contact the supplier** and confirmed the outstanding room/s required*

*Once you receive the confirmation from the supplier, remember to **update** your service status to **confirmed**.*



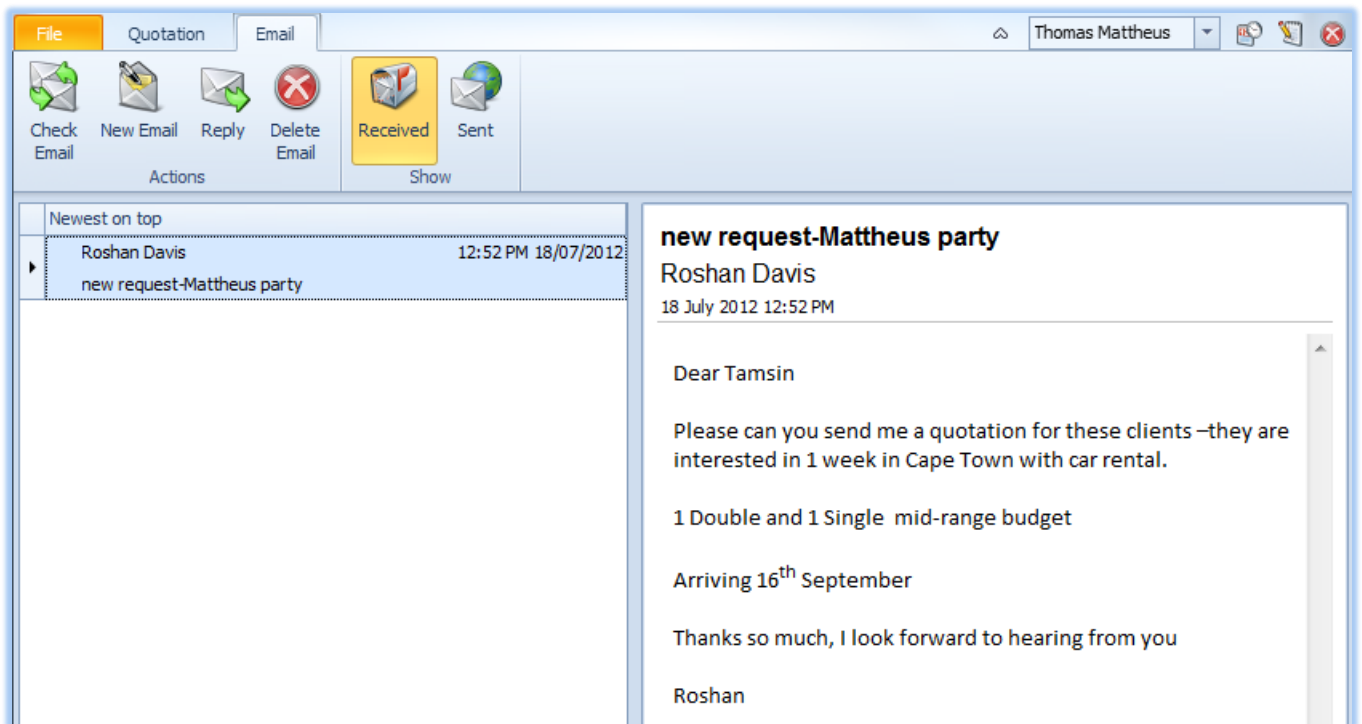
Email in Travellogic

Emails relating to your Quotations can be imported and stored in Travellogic™

IMPORTING EMAILS

Emails can only be imported from your Outlook **Inbox** or **Sent Items** folders, not from sub-folders

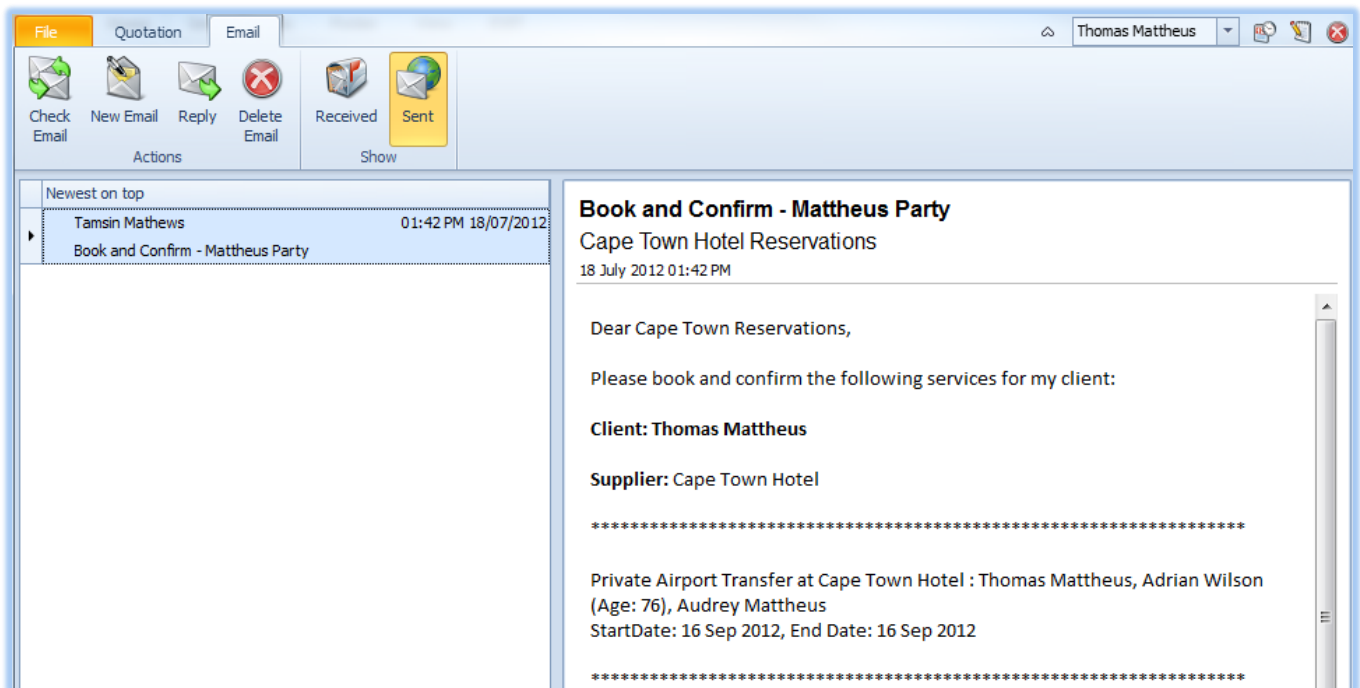
- Open the Quotation you would like to import your emails to, and go the Emails tab
- Now go to your Outlook and **drag and drop** the selected email onto Travellogic™
- All emails with the **same subject line** will be imported into the Quotation
 - *A copy of the emails will remain in Outlook*
 - *Please note that attachments are not imported with the emails*



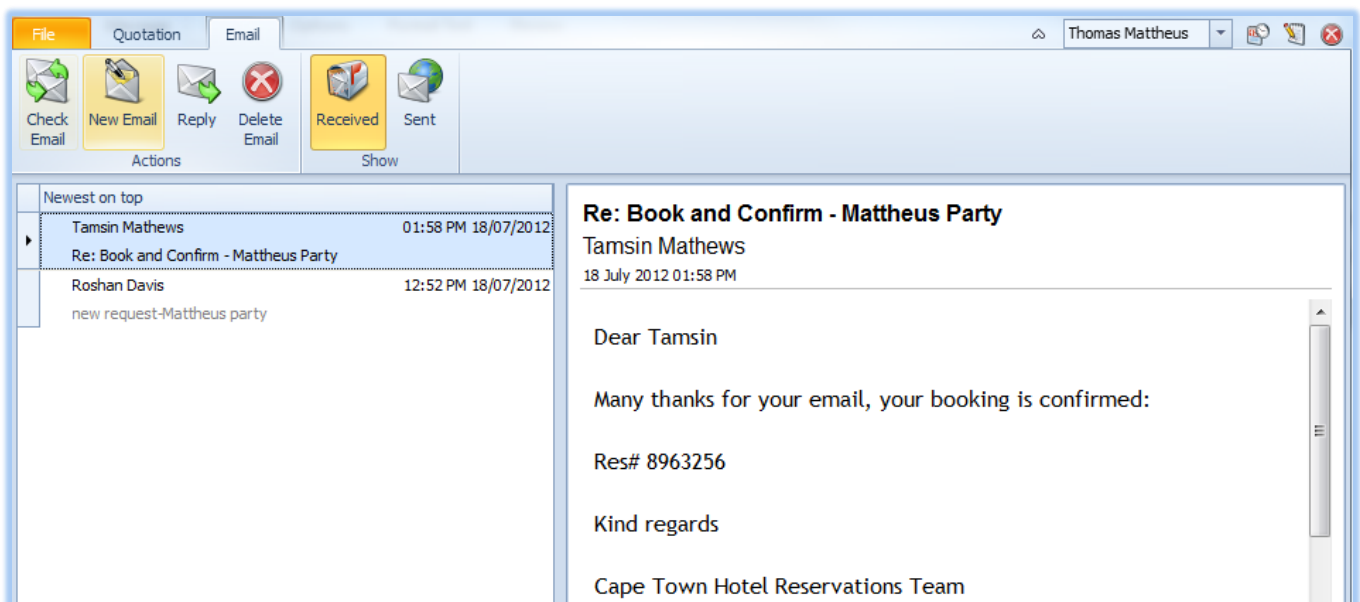
SENDING EMAILS

Make use of the **Send Email Reservations** function in Travellogic™ to email booking requests to suppliers

- Once you have sent the email from Travellogic™, click **Check Mail** to import those emails from your Sent Items into Travellogic™
 - *The email will only be imported if it is in your **Sent Items** in Outlook*
 - *A copy of the email will remain in Outlook*
- In Travellogic™, click on the **Sent** button to view your send emails



- Once you have received a reply from the supplier, click **Check Mail** to import the supplier's email from your Inbox
 - The received email will only be imported if the **subject line** is the same as the email that was sent
 - If the received email has a different subject that the email you sent, you will have to **drag and drop** the email into Travelogic™



You are also able to send **New Emails** from Travelogic by clicking on the New Email button

Once the email is sent, click the **Check Email** button to import the email into Travelogic

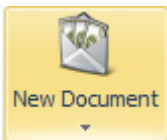


Financial

PROFORMA / CUSTOMER INVOICE

Your quotation has to be in a **locked** state before you can create a new invoice

(You will know if the quote is not locked if the Financial screen is greyed out. Go to File and click on State to change the state of the quotation.)



Go to the Financial Tab of the Quotation

Click on the **New Document** button and select **Proforma Invoice** or **Customer Invoice**

- The **Client** and **Currency** fields will default according to the quotation settings
 - This **Currency** defaults to Quotation / Home currency; by clicking on the drop down list, you can select an alternative currency, provided it has been set up as an Accounting Currency in Settings
- The Document **Date** will default to the current date, travel start or travel end date *(the date option can be set up under Account Settings)*
- The Document **Number** will be automatically generated Travelogic once the invoice is saved
- The **Description** will default to Customer (or Proforma) Invoice; this is a free text field and can therefore be edited if need be
- The **Reference** will default to the Quotation Number, and can also be edited if need be

New Document - Pro Forma Invoice

Save Save & Close Print Print Preview Add Quotation Services Update Items Delete Item Open Quotation Options

General Line Items Notes

Client: Thomas Mattheus Account Code: Creation Date: 19-11-2013

Currency: South African Rand Document Date: 15-09-2013 Closing Date: Exchange Rate: 1.0000

Document Number: Details

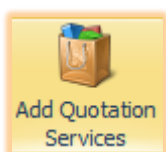
Description: Pro Forma Invoice

Reference: Q100123 Sales Code: Payment Method: (None)

**When Travellogic is integrated with Pastel accounting software:**

- Note that Accounting Code field will contain the client code from Pastel
- If this is a new client, you will be prompted to create a new code for the client in Pastel
- The Closing Date is the payment due date required by Pastel
- You will be required to enter an exchange rate if the quotation currency differs from your company currency
- Sales Code will be automatically be added, based on information from Pastel

Please see the training guide called "Accounting with Pastel Integration" for more information



Now you will click on **Add Quotation Services** at the top of the screen to add the services to your invoice:

				☒ Select All ☐ Unselect All	Thomas Mattheus [Dropdown]																								
Standard	Cost Price	Commission Earned	Calculate Commission Items	Select	Quotation Group																								
<table border="1"> <thead> <tr> <th></th> <th>Date</th> <th>Day</th> <th>Service</th> <th></th> <th>Commission</th> </tr> </thead> <tbody> <tr> <td>☒</td> <td>2013-09-15</td> <td>1</td> <td>Travelwell - Transfer Cape Town Airport - Hotel 07 Seater</td> <td>ZAR</td> <td>0.00%</td> </tr> <tr> <td>☒</td> <td>2013-09-15</td> <td>1</td> <td>Dock Road Hotel & Spa - Suite</td> <td>ZAR</td> <td>0.00%</td> </tr> <tr> <td>☒</td> <td>2013-09-16</td> <td>2</td> <td>Travelwell - Half day City Tour (AM/PM)</td> <td>ZAR</td> <td>0.00%</td> </tr> </tbody> </table>							Date	Day	Service		Commission	☒	2013-09-15	1	Travelwell - Transfer Cape Town Airport - Hotel 07 Seater	ZAR	0.00%	☒	2013-09-15	1	Dock Road Hotel & Spa - Suite	ZAR	0.00%	☒	2013-09-16	2	Travelwell - Half day City Tour (AM/PM)	ZAR	0.00%
	Date	Day	Service		Commission																								
☒	2013-09-15	1	Travelwell - Transfer Cape Town Airport - Hotel 07 Seater	ZAR	0.00%																								
☒	2013-09-15	1	Dock Road Hotel & Spa - Suite	ZAR	0.00%																								
☒	2013-09-16	2	Travelwell - Half day City Tour (AM/PM)	ZAR	0.00%																								

- All services that are **ticked** will be included in your invoice;
 - **Confirmed** services are already ticked and therefore will be automatically included
 - Feel free to un-tick services to exclude them from your invoice
- Note the row of buttons at the top of the screen:
 - **Standard:** this is the default setting of the invoice and will add the **Sell** or **Total** amount of the services to your invoice
 - **Cost Price:** click this button to add the *Cost* price of the service instead of the *Sell* prices
 - **Commission Earned:** use this setting when invoicing a Supplier for **commission due to you**
 - **Calculate Commission Items:** this setting is applicable to **Agent's Commission**



- Use this setting to **deduct** the your agent's commission from the sell price of the services allowing you to invoice a Nett amount (rack less commission) to the agent
- *Note that this is a **default** setting, i.e. this button is automatically activated; click this button to de-activate it if you are invoicing your Agent the Rack amount*
- Click **OK** to add these services to your invoice

Account	Description	Quotation	Tax	Total Exclusive	Total Inclusive	Cost Code
	Travelwell - Transfer Cape Town Ai...	Q100123	03	1 046.00	1 046.00	
	Profit on Travelwell - Transfer Cape...	Q100123	02	210.00	210.00	
	Travelwell - Half day City Tour (AM/...	Q100123	03	585.00	585.00	
	Profit on Travelwell - Half day City ...	Q100123	02	117.00	117.00	
	Dock Road Hotel & Spa - Suite	Q100123	01	10 000.00	11 400.00	
	Profit on Dock Road Hotel & Spa - S...	Q100123	02	2 280.00	2 280.00	

- Click on the **Notes** tab should you wish to add any additional information to the invoice.
- Once you have added the quotation services to your invoice, click **Save** or **Save & Close** to generate the invoice
- You can also go directly to **Print** or **Print Preview**; these buttons will automatically generate the invoice and take you straight to the Run Report screen to preview or print out the invoice.



CUSTOMER INVOICE REPORT

Follow these steps to generate a Customer Invoice **Report** (i.e. document) to send to your client:

Click on the orange File menu, select **Reports**, then **Customer Invoice**

On the Run Customer Invoice screen, you have the following options:

General

- Show Tax in Heading → *shows the word Tax in the heading, i.e. Customer Tax Invoice*
- Hide Report heading → *hides the wording "Proforma" / "Customer Invoice" from the top of the document*
- Show Document Creation Date → *use this option if your Invoices are forward dated to show the travel date**
- Show Document Date → *shows the defaulted date of your invoice*
- Show Sales Code → *shows the Pastel User Sales Analysis code*
- Show Consultant Name → *shows the User name from Travellogic™*
- Show Account Code → *shows the Pastel Client Account Code*
- Show Service Dates → *shows the start-end date of each service*
- Show Document Notes → *notes can be added under the Notes tab, once the Invoice has been created*
- Hide Company Tax Number → *hides your Company Tax / Vat Number*
- Hide Signed and Date section → *hides the Signed & Date section which appears at the end of the invoice*

* Invoices can be forward dated to reflect the travel Start or End date; from the Dashboard, go to File > Tools > Settings > Accounting > Options to forward date your invoices

Client Info

- Show Passenger Names → *shows all pax names on the Invoice*
- Show Additional Client Information → *shows the client's telephone number and email address*
- Show Client Terms → *shows the client payment terms, i.e. deposit & final payment dates & amounts ***
- Hide Group Name → *hides the Quotation Group Name*
- Show Agent Contact → *shows the Client Contact Name on the invoice*
- Hide Client Tax Number → *hides your Client's tax number field*

** See the Client training guide for steps on how to set up client payment terms

Items

- Show Line Items → *lists the quotation services in the body of the invoice*
 - Group By Service Type → *lists the services by the Service Type*
 - Hide Commission Line Items → *hides the commission line item breakdown*
- Show Services Below 'Total Cost As Per Itinerary' → *shows the Total Cost of the Itinerary*
- Show Meal Basis → *shows the applicable meal basis of each service*



Meal Basis ^

Pricing ^

- Show Price Including TAX → *shows each amount inclusive of the applicable taxes*
- Show Price Column → *shows the Total of each service line item*
- Show TAX column → *shows the Tax Totals of each service line*
- Hide Word 'Nett' For Price Column
- Show Tax → *shows the tax breakdown of the Invoice total*
- Show Gross Totals → *shows the gross booking total on the Invoice (applicable to invoices with commission)*

Commission ^

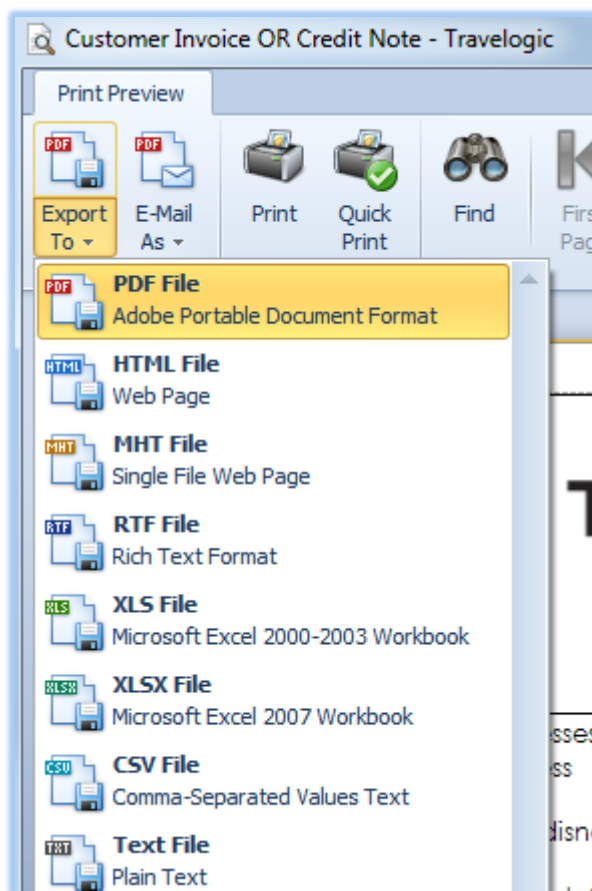
- Show Commission Summary → *shows the commission in the body of the invoice*
- Show Commission in Totals Section → *shows the commission at the end of the invoice*

Payments ^

- Show Total Payments → *shows a total of all receipts linked to this invoice*
- Show Payments Summary → *shows a list of all receipts linked to this invoice*

Once you have run the Customer Invoice Report, you are able to **export** it to various **formats** for forwarding and editing purposes

- Click on the **Export To** button at the top left-hand side of the screen:



RECEIPT

Once you receive payment from your client; you can capture this as a **Receipt** in Travelogic™ and **link** it to the applicable proforma / customer invoice

- **Select** the applicable Proforma or Customer Invoice, click on the **New Entry** button and select **New Receipt**
- You will be asked if you would like to **link** the receipt to the client document you have highlighted
- If you click **Yes: (Recommended)**
 - The receipt will be automatically generated based on the **details, totals** and **quotation services** of the selected invoice
 - You may edit the **Reference, Description as well as the Amount Inclusive** fields, if need be



 Save		 Save & Close		 Link Quotation Services Items		 Delete Item	
Actions				Items			
General Services							
Client:	Thomas Mattheus ... X			Cash Book:	(None) v		
Entry Date:	19-11-2013 v			Account Code:	... X		
Currency:	South African Rand v			Exchange Rate:	1.0000 v		
Linked Document:	PF100075 ... X						
Details -----							
Reference:	Q100123						
Description:	25% Deposit Paid, thank you						
Amounts -----							
Amount Inclusive:	3 909.50 v			Tax Type:	Not Applicable v		
Discount:	0.00 v			Tax Amount:	0.00 v		

When Travelogic is integrated with Pastel accounting software:

- The Cash Book and Accounting Code fields will contain the relevant information from Pastel
- You will be required to enter the exchange rate if the quotation currency differs from the company currency



- If you click **No** to linking the Receipt to the client document:
 - You will be required to **manually** add the services to the receipt
 - Click **Link Quotation Services** button and select the services

Quotation	Description	Currency	Amount	Rate	Total
Q100123	Travelwell - Transfer C...	ZAR	1 256.00	1.00	1 256.00
Q100123	Travelwell - Half day Ci...	ZAR	702.00	1.00	702.00

15 638.00

- If all the details are correct, click **Save** or **Save & Close**



HOW TO SHOW THE RECEIPT ON THE CUSTOMER INVOICE REPORT:

You can now reflect this receipt on the Customer Invoice Report to

- 1) advise your client of the balance of payment due, if applicable, OR
 - 2) in this case, full payment has been made
- When running the Customer Invoice Report, go to the **Payment** tab
 - Select **both** the check boxes:

Payments

☒ Show Total Payments

☒ Show Payments Summary

- **Show Total Payments** will show the **Total Amount** of the receipts linked to this invoice
- **Show Payments Summary** will show a **list** of the Receipts linked to this invoice, as follows:

Payment Summary

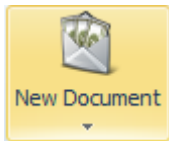
Date	Description	Currency	Amount
19 Nov 2013	25% Deposit Paid, thank you	ZAR	3,909.50

Absa Bank
Acc. 9063269654
Branch Code 62005

TOTAL	ZAR	15,638.00
RECEIPTS	ZAR	3,909.50
AMOUNT DUE	ZAR	11,728.50



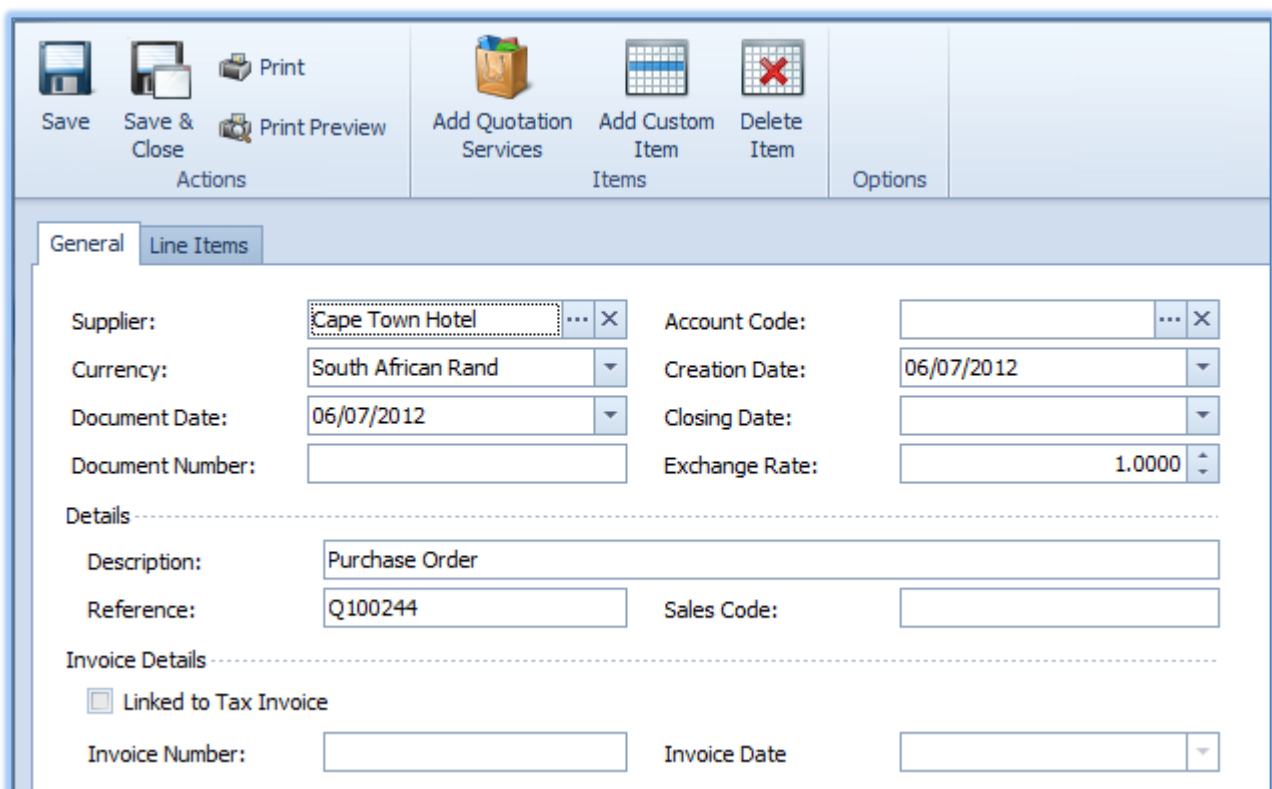
PURCHASE ORDER / SUPPLIER INVOICE



Click on the **New Document** button to create a new **Purchase Order** or **Supplier Invoice**

Supplier: click on the Search / Find button  to call up a list of the suppliers used in the Quote

- From the list, select the **supplier** you would like to invoice, click **OK**
- The supplier **currency** will automatically pull through to the invoice
- The Document **Date** is set according to the company accounting settings (i.e. Current Date, Start Date or End Date of travel)
- The Document **Number** is automatically generated once the document is saved
- The **Description** will default to Customer Invoice, and can be edited if need be
- The **Reference** will default to the Quotation Number, and can also be edited if need be



The screenshot shows a software interface for creating a Purchase Order or Supplier Invoice. At the top is a toolbar with icons for Save, Save & Close, Print, Print Preview, Add Quotation Services, Add Custom Item, and Delete Item. Below the toolbar are two tabs: 'General' (selected) and 'Line Items'. The 'General' tab contains several input fields: 'Supplier' (Cape Town Hotel), 'Account Code' (empty), 'Currency' (South African Rand), 'Creation Date' (06/07/2012), 'Document Date' (06/07/2012), 'Closing Date' (empty), 'Document Number' (empty), and 'Exchange Rate' (1.0000). Below these are sections for 'Details' and 'Invoice Details'. The 'Details' section has 'Description' (Purchase Order), 'Reference' (Q100244), and 'Sales Code' (empty). The 'Invoice Details' section has a checkbox for 'Linked to Tax Invoice' (unchecked), 'Invoice Number' (empty), and 'Invoice Date' (empty).

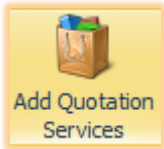
When Travelogic is integrated with an accounting package (Pastel):

- The Accounting Code field will contain the client code from Pastel
- If this is a new client, you will be prompted to create a new code for the client in Pastel
- The Closing Date is the payment due date required by Pastel
- You will be required to enter the exchange rate if the quotation currency differs from your company currency



- Sales Code will be added, based on information from Pastel

Click on **Add Quotation Services** button to add line items to your invoice:



- **Tick** the service/s that are applicable to this supplier that you would like to **add** to the invoice
- Note the row of buttons at the top of the screen:
 - **Standard:** this is the default setting and will add the **Cost** amount of the supplier's services to your invoice
 - **Calculate Commission Items:** this setting is applicable to the **Commission** you earn on a supplier service
 - Use this setting to **deduct** the commission from the price of the services allowing you to capture the Nett amount (less commission) owing to the supplier
 - *Note that this is a **default** setting, i.e. this button is automatically activated; click this button to de-activate it if you are capturing the full amount of the supplier (in this case you will invoice the supplier for the commission owing to you at a later date)*

Quotation Services - Travelogic

	Date	Day	Service
☒	2012/09/16	1	Private Airport Transfer at Cape Town Hotel
☒	2012/09/16	1	Standard Room at Cape Town Hotel
☐	2012/09/17	2	Private Full Day Cape Peninsula Tour at Vita Tours

- Click **OK** to add the quotation services to the supplier invoice
- Now click **Save** or **Save & Close** to generate the supplier invoice



PAYMENTS

Once you have made a payment to the supplier; you will capture the Payment in Travelogic and link it to the applicable purchase order / supplier invoice

- In the Financial screen of the quote, **select** the applicable Purchase Order or Supplier Invoice, click on the **New Entry** button and select **New Payment**
- You will be asked if you would like to **link** the receipt to the client document you have highlighted
- If you click **Yes: (Recommended)**
 - The payment will be automatically generated based on the **details, totals** and **quotation services** of the selected invoice
 - You may edit the **Reference** or **Description** fields
 - If all the details are correct, click **Save** or **Save & Close**

The screenshot shows the 'New Payment' form in Travelogic. The form is divided into sections: 'General' and 'Services'. The 'General' section contains the following fields:

- Client:** Cape Town Hotel
- Entry Date:** 06/07/2012
- Currency:** South African Rand
- Cash Book:** (None)
- Account Code:**
- Exchange Rate:** 1.0000
- Reference:** Payment
- Description:** Q100244
- Amounts:**
 - Amount Inclusive:** 7 680.00
 - Discount:** 0.00
 - Tax Type:** Zero Rated
 - Tax Amount:** 0.00

When Travelogic is integrated with Pastel accounting software:

- The Cash Book and Accounting Code fields will contain the relevant information from Pastel
- You will be required to enter the exchange rate if the quotation currency differs from the company currency



- If you click **No** to linking the Receipt to the client document:
 - You will be required to **manually** add the services to the receipt
 - Click **Add Quotation Services** and select the applicable supplier services
 - Click **OK**
- If all details are correct, click **Save** or **Save & Close** to create the payment

Creditors

This screen contains a **summary** of the invoices and payments that are applicable to the suppliers (creditors) in your booking

From this screen you will be able to:

- Determine which suppliers have been or need to be **invoiced**
- Determine which suppliers have been **paid** or have payments **outstanding**

Exchange Rates

When the currency of a service differs from the quotation currency, Travellogic will **automatically** use the exchange rate that is stored in Settings to convert the service currency to the quotation currency

In the **Quotation**:

- The **Cost** and **Sell** columns will display the **service currency** amounts
- The **Total** column will display the converted amount in your **quotation currency**



The screenshot shows the 'Itinerary' tab for a quotation titled 'Q100220 - Quotation'. The window includes a toolbar with various actions like 'Find Services', 'Add Service', 'Delete Service', 'Show Pricing', 'Refresh Rates', 'Validate Itinerary', 'Insert Package', 'Move Services', 'Move Up', 'Move Down', and 'Arrange'. Below the toolbar is a table summarizing the services for three days in September 2012.

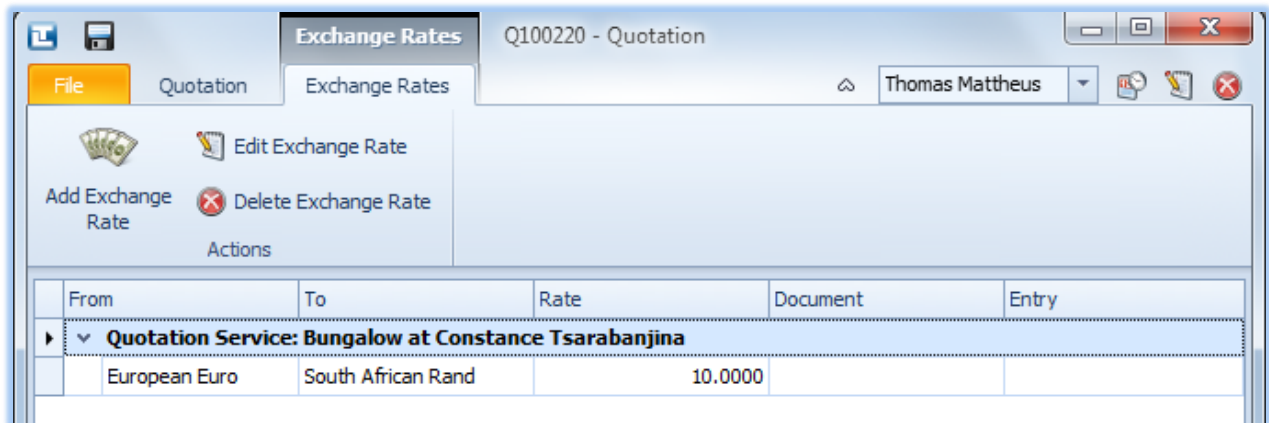
Day	Service	Qty	Pax		Cost	GP	Sell	Total
Sunday, 16 September 2012								
1	Bungalow at Constance Tsarabanjina	2	3	EUR	594.00	20.00	712.80	7 128.00
Monday, 17 September 2012								
2	Bungalow at Constance Tsarabanjina	2	3	EUR	594.00	20.00	712.80	7 128.00
Tuesday, 18 September 2012								
3	Bungalow at Constance Tsarabanjina	2	3	EUR	594.00	20.00	712.80	7 128.00



- In the example above, note that the **service** currency, **cost** and **sell** totals are in European Euro (EUR)
- The **Total** column displays the **Quotation** Currency (ZAR) using an exchange rate of ZAR 10.00 to the EUR

The exchange rate used at the time of this conversion is stored in the **Exchange Rates** section of your quotation:

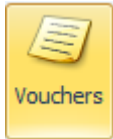
- Click on the Quotation tab, then Exchange Rates:



- Note that you are able to **adjust / update** the exchange rate, should you need to
*Once the exchange rate is captured in your quotation, if the exchange rate is updated in Settings; it will **not** automatically update the exchange rate captured in the quotation*
 - Highlight the exchange rate and click **Edit Exchange Rate**
 - Edit the exchange rate
 - Click OK



- If the exchange rates are not in Settings you are also able to **add** an exchange rate of your own
 - Click the **Add Exchange Rate** button
 - Add the From / To Currencies and the exchange rate
 - Click OK



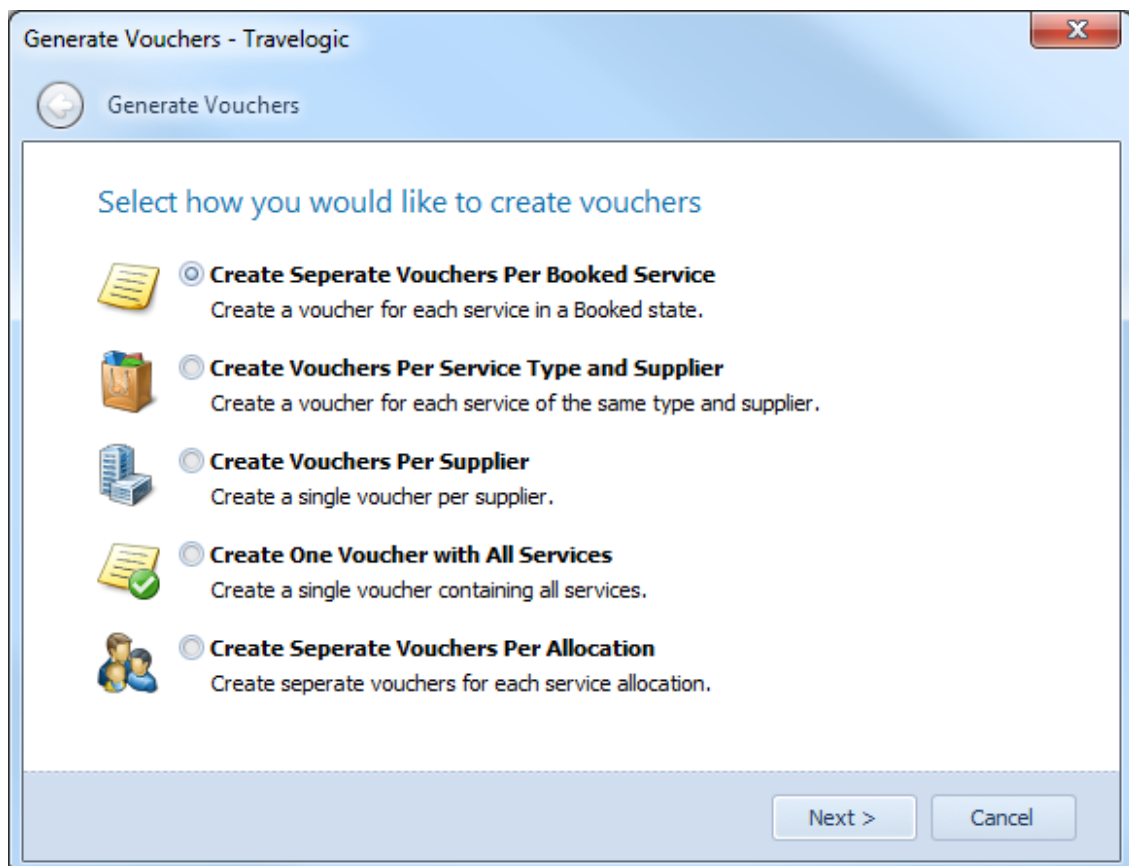
Vouchers

Vouchers can only be generated for **confirmed** services, therefore before generating vouchers, go to the Reservations Tab and check the status of the services

Click the **Voucher** button on the Quotation tab

Follow these steps to create your vouchers:

- Click **Auto Generate** and select the **voucher format** from the following list:



- Specify the **Payment Basis** and click **Next**
- Enter any **Voucher Requirements**:
 - Select where you would like to add the requirements; you have the choice of **"Add to All Vouchers"** or a specific **Service Type** only



- Click **New**
- **Add** the requirements or **select** from the drop-down list of saved/previously entered requirements
- *You may add multiple requirements but bear in mind the space allowed on the voucher*

Enter any voucher requirements

Accommodation

Mrs McPhee is allergic to strawberries

New...

Edit...

Delete

Finish Cancel

- Click **Finish**

You will now see a list of your generated vouchers, each with their own voucher number:

Voucher	Client	Description
V100253	Thomas McPhee	Private Airport Transfer at Cape Town Hotel
▶ V100254	Thomas McPhee	Group A (WV Chico or similar) SuperCover at An...
V100255	Thomas McPhee	Mediterranean Buffet Lunch at XYZ Restaurant
V100256	Thomas McPhee	Delivery/Collection Fee (After Hours) at Anytim...
V100257	Thomas McPhee	Standard Room at Cape Town Hotel
V100258	Thomas McPhee	Standard Room at Cape Town Hotel
V100259	Thomas McPhee	Contract Fee at Anytime Car Hire

Click **Edit Voucher** or double click to view or edit the following information:

- The traveller name
- Meal basis or payment basis
- Service description



- Edit or Add voucher requirements

Voucher

General | Voucher Services | Requirements

Traveller Name: Thomas McPhee

Meal Basis: (None) [dropdown] [X]

Payment Basis: Pre-Paid [dropdown] [X]

Date Created: 17 May 2012 [dropdown]

Description: Private Airport Transfer from Cape Town International Airport to Cape Town|Hotel

Print the vouchers by clicking on the orange File menu, click on **Reports** and select **Voucher**

- Select the voucher/s you would like to print:
To select all vouchers, right click and click Select All

Run Report - Voucher

Report Settings: Default [dropdown]

Quotation: Q100165 -Quotation for Thomas McPhee [dropdown]

Quotation Group: Thomas McPhee [dropdown]

Voucher:

☒	V100253
☐	V100254
☐	V100255
☐	V100256
☐	V100257
☐	V100258

Select All
Unselect All



You also have choice of the following options:

Options

- Show Supplier Map → *shows the map that has been loaded under the specific Supplier**
- Show Supplier Voucher Descriptions → *these are descriptions that have been set up on the Supplier***
- Show Client Logo → *display's the client's logo (instead of your own) on the report*
- Show Passenger Names *shows the Passenger's names instead of the Group name*
- Car Rental Voucher → *only to be used if you have a specific car rental voucher customised by Travellogic™*

* Go to the Supplier, click on the Information tab, add a new IMAGE and under Type, select Map from the drop down list

** Go to the Supplier, click on the Information tab, add a new DESCRIPTION and under Type, select Voucher from the drop down list

Click **OK** to run the voucher report

OTHER REPORTS:

The Booking Sheet Report

The Booking Sheet gives you a **detailed summary** of your booking, including passenger details, service details, client invoices/receipts and supplier invoices/payment

This report is **ideal for internal use**, but can also be sent to clients

Click on the orange File menu, select **Reports** then **Quotation**

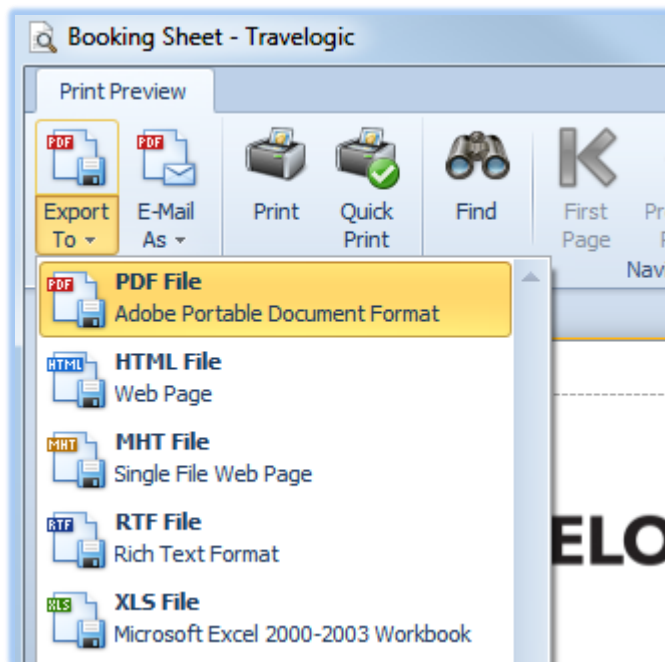
In the **Run Report – Booking Sheet** screen, you have the following options:

- Show Timing → *shows the start and end times of each service in the report*
- Show Default Contact Details → *shows the Client Contact's information incl. telephone & email address*
- Show Supplier Documents → *shows the Supplier Invoice/Purchase Order details per service*
 - Show Blank Supplier Docs → *provides blank fields for the user to entered details manually*
- Show Invoices → *shows the Customer /Proforma Invoices created for this booking*
- Show Credit Notes → *shows the Credit Notes associated with this booking*
- Show Receipts → *shows the Receipts, i.e. payments received by the client*
- Show Passenger Information → *shows each passenger's Dietary and Medical requirements as well as Notes*
- Group Report by Service Type → *shows the services grouped by Type, instead of in date order*
- Show Service Allocation → *shows the pax allocated to each service, as well as the meal basis*

Once you have run the Booking Sheet Report, you are able to **export** it to various **formats** for forwarding and editing purposes



- Click on the **Export To** button at the top left-hand side of the screen:



Note that you are also able to **E-Mail** this report in any of these formats - this action generates an **Outlook Email** with the report attached in your chosen format