

# SECTION 5: LIMITS AND LOADINGS

**Review**

**Limits and Loadings**

**Confirm Waitlist/Generic**

**Allotments & Blocks**

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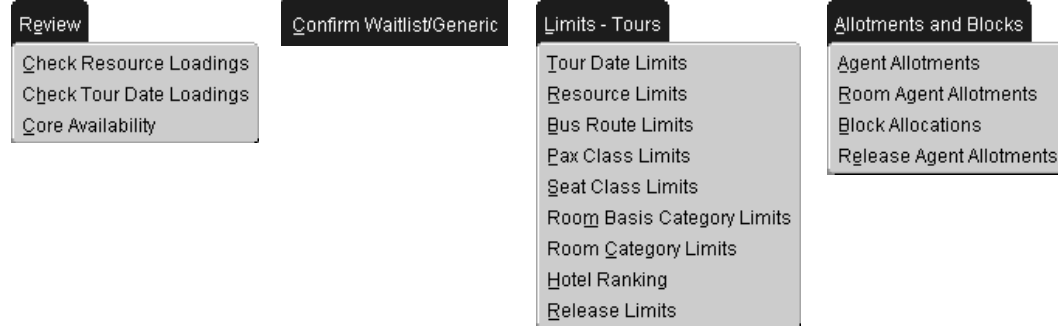
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# Controlling Limits, Allotments & Blocks

Tour limits provide a very flexible way of controlling tour, resource and other limits by date ranges and individual dates. This allows the limits to be raised or lowered on specific dates to reflect operating conditions or resource availability.

Tour limits are not essential to the running of PRO\*Resort as the system will use the maximum loadings specified in the tour master files by default. However they do contribute significantly to the power of the system.

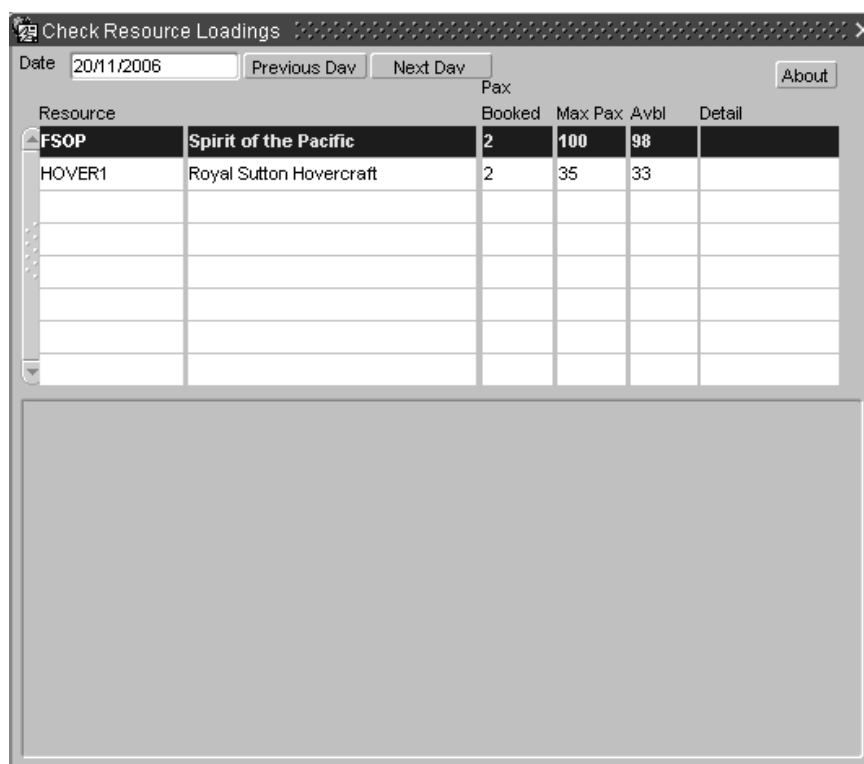
## 5.0 Menus



# 5.1 Review

## 5.1.1 Check Resource Loadings

Module Name	Access Path	Purpose
PTLOADS	Limits and Loadings/ Review/ Check Resource Loadings	To review resource limits for a specified date



Check Resource Loadings presents a graphical and tabular display of resource loadings on a date by date basis. This form opens in query mode.

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<b>Date</b>	Specify the date for review, in the format DD/MM/YYYY.
<b>Previous/Next Day</b>	Use the buttons to move forwards and backwards by date.
<b>Resource</b>	Lists all resources where loadings exist for the date selected.
<b>Pax Booked</b> <b>Max Pax</b> <b>Avbl</b> <b>Detail</b>	Provides summary details of the individual resources.

---

**Graph**

Presents all resources in graphical format and compares maximum resource limit with actual booked.



*Pax Booked column changes to red when booked gets to within 10% of maximum for the date.*

Right mouse on resource to display:

Resource		Booked	Max Pax	Avbl	Detail
FSOP	Spirit of the Pacific	2	100	98	
HOVER1	Royal Sutton Hovercraft	2	35	33	

Display Tour Detail

Display Seat Class Detail

Graph

**Display Tour Detail**

Displays summary loading details of all tours associated with the selected resource. In the example, tour BAYHOV use the HOVER1 resource.

Resource		Booked	Max Pax	Avbl	Detail
FSOP	Spirit of the Pacific	2	100	98	
HOVER1	Royal Sutton Hovercraft	2	35	33	

Tour Loadings for HOVER1 / 20-Nov-2006

Tour		Booked	Max Pax	Allotted	Avbl	Wtlist
BAYHOV	THE BAY BY HOVERCRAFT	2	35	0	33	0

**Display Seat Class Detail**

Displays summary loadings details of all seat classes associated with the selected resource. In the example, only First seat classes exist.

Resource		Booked	Max Pax	Avbl	Detail
FSOP	Spirit of the Pacific	2	100	98	

Seat Class Summary for Spirit of the Pacific

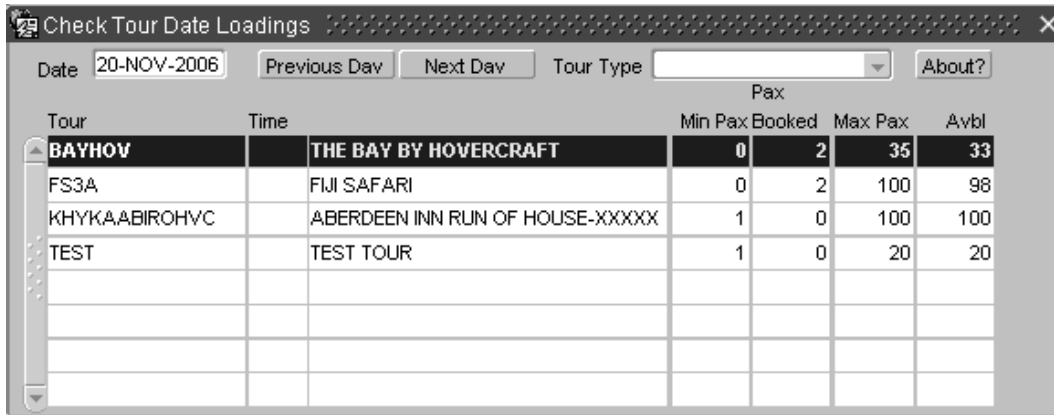
Seat Class	Max	Bkd	All	Blk	Held	Waitlist	Overbook	Available
FIRST	100	0						100

**Graph**


Graphical display of maximum and booked passengers on each resource, shown in the lower half of the resource loadings form.

## 5.1.2 Check Tour Date Loadings

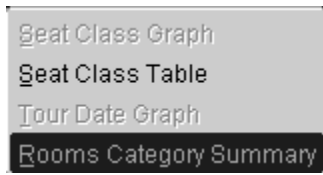
Module Name	Access Path	Purpose
PTTDLOAD	Limits and Loadings/ Review/ Check Tour Date Loadings	To review tour limits for a specified date and tour type



Check Tour Date Loadings presents a graphical and tabular display of tour date loadings by date and tour type.

<b>Date</b>	Specify the date for review in format DD-MMM-YYYY. Defaults to todays date.
<b>Previous/Next Day</b>	Use the buttons to move forwards and backwards one day.
<b>Tour Type</b>	Select a tour type from the drop list. Default = null (blank) = all tour types.
<b>Tour</b>	Lists all tours where loadings exist for the date and tour type selected.
<b>Time</b>	Displays the tour time for Timed Departure style tours.
<b>Min Pax Pax Booked Max Pax Avbl</b>	Provides summary details of the individual resources.
<b>Graph</b>	<p>Presents all tours in graphical format and compares maximum resource limit with actual booked.</p>  <p><i>Colour changes within the bar chart reflect booked, available and overbooked.</i></p>

Right mouse on tour to display:



**Seat Class Graph** Not currently operational.

**Seat Class Table** Displays summary loadings details of all seat classes associated with the selected tour. In the example, only a First seat class exists.

Tour	Time	Min Pax	Booked	Max Pax	Aybl
BAYHOV	THE BAY BY HOVERCRAFT	0	2	35	33
FS3A	FUJI SAFARI	0	2	100	98

Seat Class Summary for FSOP								
Seat Class	Max	Bkd	All	Blk	Held	Waitlist	Overbook	Available
FIRST	100	0						100

**Tour Date Graph** Not currently operational.

**Room Category Summary** Displays the room category status in the context of accommodation style tours.

Tour	Time	Min Pax	Booked	Max Pax	Aybl
FS3A	FUJI SAFARI	0	2	100	98
KHYKAABIROHVC	ABERDEEN INN RUN OF HOUSE-XXXXX	1	0	100	100

Rooms Status									
Category	Orig	Max	Bkd	Block	Held	Waitlist	Overbk	Alloted	Available
FRAYS	50	50							50

## 5.1.3 Core Availability

Module Name	Access Path	Purpose
PTDSPCOR	Limits and Loadings/ Review/ Core Availability	To review availability of pre-selected products

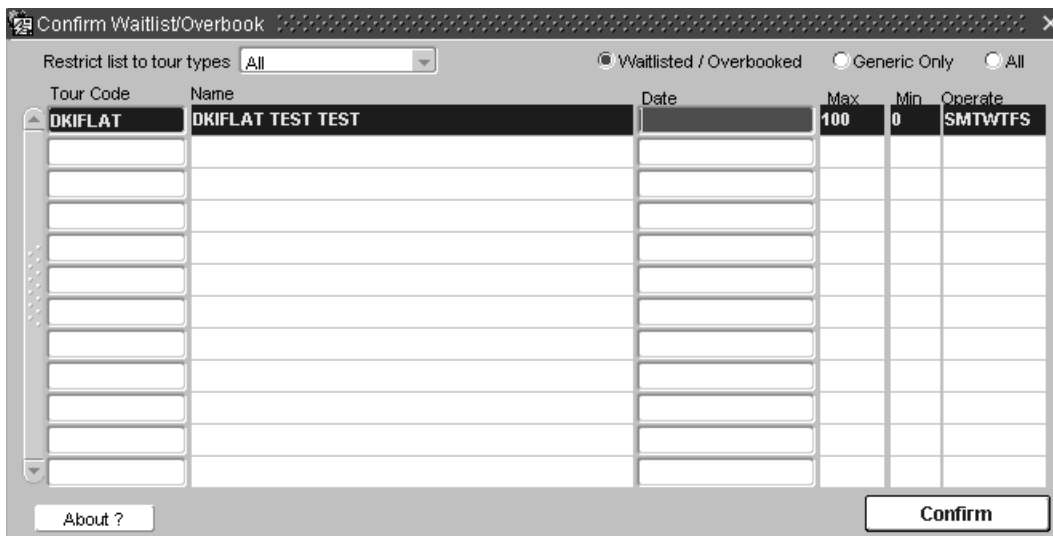
Date: 20-NOV-2006		20-NOV	21-NOV	22-NOV	23-NOV	24-NOV	25-NOV	26-NOV	27-NOV	28-NOV	29-NOV	30-NOV	01-DEC	02-DEC	03-DEC
		2006	2006	2006	2006	2006	2006	2006	2006	2006	2006	2006	2006	2006	2006
		MON	TUE	WED	THU	FRI	SAT	SUN	MON	TUE	WED	THU	FRI	SAT	SUN
<b>Seat Classes</b>	FIRST NORTHBOUND	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	FIRST SOUTHBOUND	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Accommodation</b>	FRAY	0	0	0	0	0	0	0	0	0	0	0	0	0	0
<b>Tour</b>	DINNER	0	0	0	0	0	0	0	0	0	0	0	0	0	0

☞ See Section 3: Core Availability

## 5.2 Confirm Waitlist/Generic

### 5.2.1 Confirm Waitlist/Generic

Module Name	Access Path	Purpose
PTRSEL/PTRCFM	Limits and Loadings/ Confirm Waitlist/Generic	To confirm waitlisted or generic tours and assign hotels



Where waitlisting has been implemented (i.e., when WAITLIST\_PCNT in System Parameters has been set to any value greater than 0% and appropriate tours have been flagged as either Normal or Auto Waitlist), this form is used to manage and confirm waitlisted bookings.

The form is also used to manage non-waitlisted Generic tours.

<b>Restrict List to Tour Types</b>	Use drop list to filter by specific Tour Type. Default = All
<b>Waitlisted /Overbooked</b>	Default. Check the radio button to filter the list to bookings that are either Waitlisted or Overbooked.
<b>Generic Only</b>	Check the radio button to filter the list to include only Generic tours.
<b>All</b>	Check the radio button to enable unrestricted query of bookings.

**Date** Use List of Values (or double click) to select from a list of dates on which the selected tour is waitlisted or overbooked.

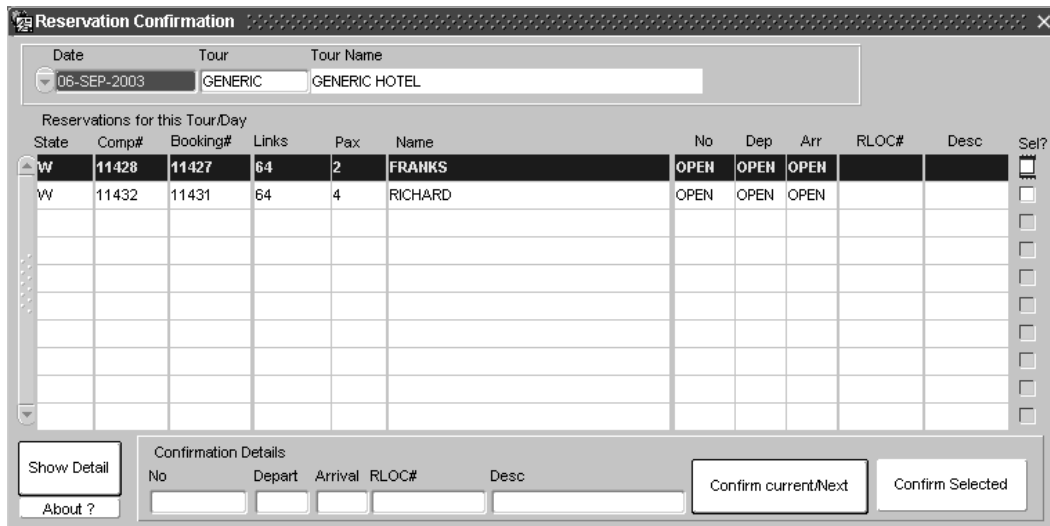


Or key date if known.

**Max Min** Displays the Maximum and Minimum loadings specified on the Tour and Package master file.

**Operates** Displays Days of Operation of the tour.

Once a tour and date have been selected use the CONFIRM button to display:



**Upper Block**


**Date** Displays date of selected tour.

**Tour \Tour Name** Code and Name of selected tour.

**Lower Block**

Displays bookings that meet the criteria of the query.

**State** Status of the booking:  
 C Confirmed  
 W Waitlist  
 O Overbooked

<b>Comp#</b>	Confirmation number of component.
<b>Booking#</b>	Confirmation number of parent reservation.
<b>Links</b>	Indicates reservations that are linked. In the example, the two bookings are linked by #64.  <i>If a linked booking is selected by checking the Sel? Box then any bookings linked to it are automatically checked so that they may be processed together. In the event that combined processing is not required then manually uncheck bookings as required.</i>
<b>Pax</b>	Number of passengers for this component.
<b>Name</b>	Booking name.
<b>Sel?</b>	Check the box to select this booking for processing.
<b>Show Detail</b>	Click this button to display the full details of the selected booking. Loads Simple or Compound Reservations in context.

The following 5 fields relate to Externally Managed products:

 See Section 4: Compound Reservations

<b>No (Number)</b>	Third party reference number.
<b>Dep (Departs)</b>	Departure time, e.g., flight departure.
<b>Arr (Arrives)</b>	Arrival time, e.g., flight arrival.
<b>RLOC#</b>	Record Locator number in third party system.
<b>Desc (Description)</b>	Free text description.

## Processing Waitlisted bookings

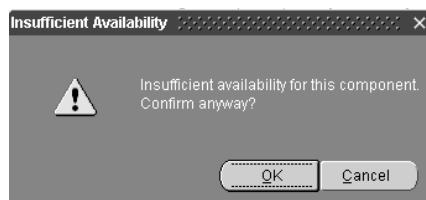
### **Non-Generic non-Accommodation style tours:**

1. Select a booking (or group of bookings) to be processed by checking the Sel(ect) box.
2. Enter any Confirmation Details that are required to be posted to the processed bookings.



*If the tour being processed is not set to Externally Managed (see Section 3: Tour & Package Maintenance) then any Confirmation Details passed from here will be set to view only, i.e., not editable in the reservation form.*

- Click the Confirm Selected button. If availability exists then the booking is processed without warning. If insufficient availability exists then the following alert is raised.



Selecting OK will confirm the booking by over-riding the relevant limit ie by creating an overbooked position in the relevant loading.

- Bookings are processed and the booking status is changed to Confirmed from Waitlist.

### Generic Accommodation style tours:

- With Accommodation style tours, the Confirm Selected button is not available and is grayed out. Use the mouse or arrow keys to highlight the booking to be processed.
- Enter any Confirmation Details that are required to be posted the processed bookings.



*If the tour being processed is not set to Externally Managed (see Section 3.1.21 Tour & Package Maintenance) then any Confirmation Details passed from here will be set to view only, i.e., not editable in the reservation form.*

- Click the Confirm current Next button to display the Set Hotel form:



See Set Hotel for detailed use of this form.

- Bookings are processed and the booking status is changed from Waitlist to Confirmed.



*Unlike non-accommodation tours, availability must exist to be able to confirm hotels via the Set Hotel form.*

### Processing Generic Accommodation style non-Waitlisted bookings

- With Accommodation style tours, the Confirm Selected button is not available and is grayed out. Use the mouse or arrow keys to highlight the booking to be processed.

2. Enter any Confirmation Details that are required to be posted the processed bookings.



*If the tour being processed is not set to Externally Managed (see Section 3: Tour & Package Maintenance) then any Confirmation Details passed from here will be set to view only, i.e., not editable in the reservation form.*

3. Click the Confirm current Next button to display the Set Hotel form:

Original	Original Value	
1 days =	0.00	

Add	Add Value	Rooms
0 days =	0.00	1



See Set Hotel for detailed use of this form.

4. Bookings are processed.

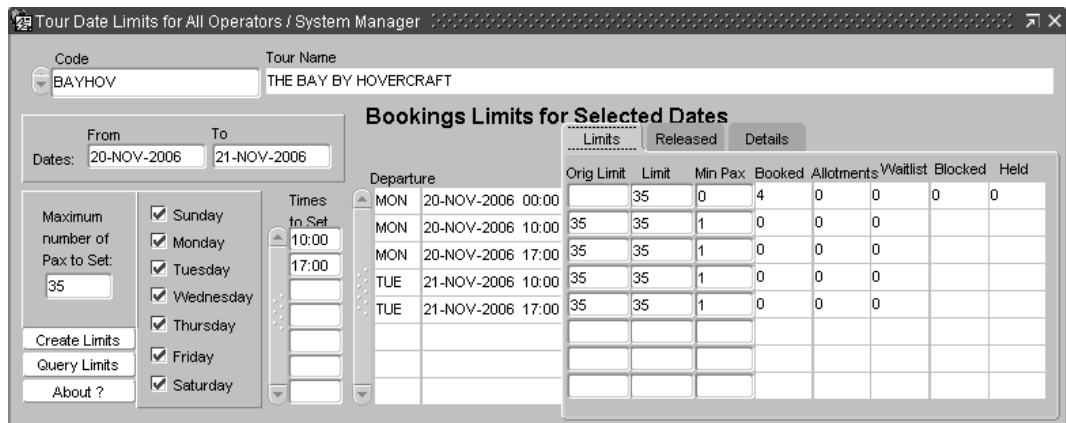


*Unlike non-accommodation tours, availability must exist to be able to confirm hotels via the Set Hotel form.*

# 5.3 Limits and Loadings

## 5.3.1 Tour Date Limits

Module Name	Access Path	Purpose
PTALLOC	Limits and Loadings/ Limits - Tours/ Tour Date Limits	To enter or amend tour limits for specified dates or date ranges



Tour Date Limits may be used to create new passenger limits for a specified tour over a specified date range or to query and amend existing tour date limits.



*Tour Date Limits can only be set when Track Loadings is checked on the Tour and Package Maintenance form.*

*See Section 3: Tour and Package Maintenance*


<b>Code</b>	Enter a tour code to query an existing tour.
<b>Tour Name</b>	The long name or description of the tour is displayed.
<b>Dates From/To</b>	Enter the date range for which the limits are to be applied or within in which the query is to be applied. Double clicking (or selecting [List of Values]) on either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the tour code and date range have been set then the Query Limits button may be used to display any existing limits for the date range. These are displayed in the right hand portion of the screen and show Day, Date, Time, Limits set, Minimum number, Booked, Allotments, Waitlisted, Blocked and Held.  To edit a single limit, overwrite the relevant figure in the list and commit the change.

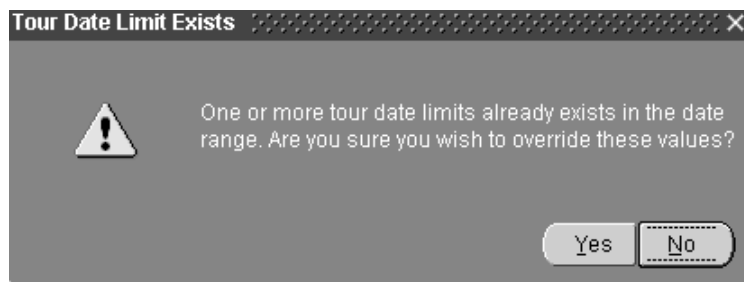
**(Days of the Week)** Use the check boxes to indicate for which days of the week limits are to be created. Only those Days of Operation specified on the Tour and Package Maintenance form (see Section 3: Tour and Package Maintenance) will be available via this form. Non-operation days will appear greyed out.

**Times to Set** With Timed Departure tours (where Master File is set to Timed Departures = Yes), then the Times to Set column is active and individual times for departure may be input. When the Create Limits button is pushed (see below), limits are created for each time specified within the date range specified.

**Maximum Number of Pax to Set** Specify the limit that is required to be set for the date range selected.

**Create Limits** Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.

 **Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected:**



**Limits Tab**


**Bookings Limits for Selected Dates**

Departure		Orig Limit	Limit	Min Pax	Booked	Allotments	Waitlist	Blocked	Held
MON	20-NOV-2006 00:00		35	0	4	0	0	0	0
MON	20-NOV-2006 10:00	35	35	1	0	0	0		
MON	20-NOV-2006 17:00	35	35	1	0	0	0		
TUE	21-NOV-2006 10:00	35	20	1	0	0	0		
TUE	21-NOV-2006 17:00	35	20	1	0	0	0		

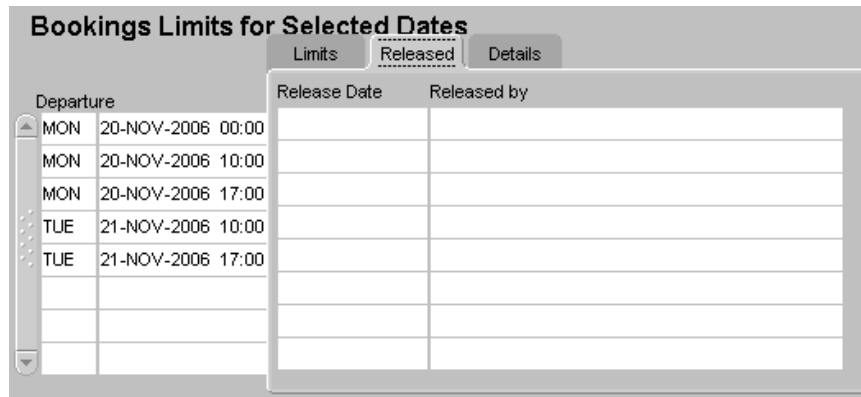
**Orig Limit** The default limit as per Tour and Package Maintenance.

**Limit** The maximum number of passengers for the tour on a particular date (and time if a Time Departure tour). In the above example this has been reduced to 20 for the tours on

Tuesday.

<b>Min Pax</b>	Minimum passengers as per Tour and Package Maintenance.
<b>Booked</b>	Total number of passengers booked on the tour on a particular date (and time if Timed Departure tour).
<b>Allotments</b>	<p>The total of all allotments for the tour on a particular date (and time if Timed Departure tour). The Limit figure INCLUDES any allotments.</p> <p>When bookings are made from allotment, the Allotments figure is reduced and the Booked figure increased correspondingly.</p> <p> See Agent Allotments later in this section</p>
<b>Waitlist</b>	<p>The total of all waitlisted passengers for the tour on a particular date (and time if Timed Departure tour). The Limit figure EXCLUDES the waitlist limit which is calculated as:</p> <p>Limit + Waitlist percentage (see Section 2.1.2 System Parameters) e.g., Limit = 60 and Waitlist Percentage = 10% would allow 6 passengers to be waitlisted.</p> <p>When bookings are made from waitlist, the Waitlist figure is reduced and the Booked figure increased correspondingly.</p>
<b>Blocked</b>	<p>The total block allocation for the tour on a date (and time if Timed Departure tour). The Limit figure EXCLUDES the block limit. Thus, when a block is created (see Block Allocations later in this section), the Limit is reduced by the amount of the block.</p> <p>When bookings are made from block, the Blocked figure is reduced and the Booked AND Limit figures are increased correspondingly.</p>
<b>Held</b>	<p>The Held figure represents the total number of passengers on a date (and time if Timed Departure tour) held from block (see Section 6 Travel Workbench).</p> <p>When components are held in Travel Workbench itineraries, the Blocked figure is reduced correspondingly. When these held components are posted to reservations then the Held figure is reduced, Blocked remains unchanged, &amp; Booked AND Limit are increased correspondingly.</p>

**Released Tab**



These fields are display only.

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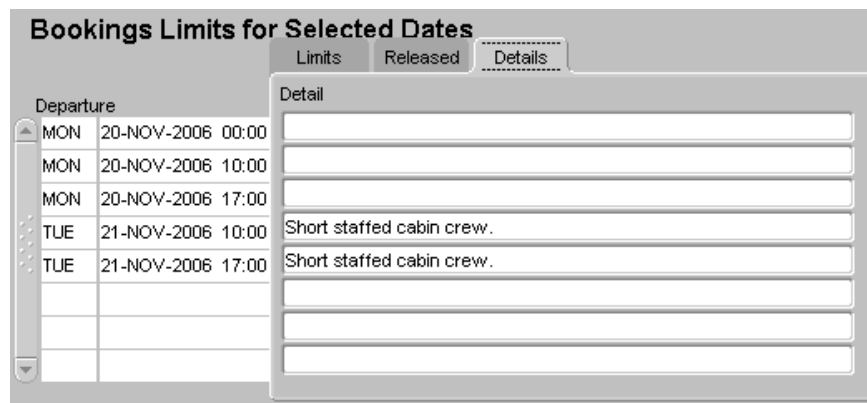
**Release Date** Provides details of date and time the limit was released.

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**Released by** The employee who made the release.

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**Details Tab**




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**Details** Allows separate notes to be added against each date/ time.

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## 5.3.2 Tour Resource Limits

Module Name	Access Path	Purpose
PTALLOC	Limits and Loadings/ Limits - Tours/ Resource Limits	To enter or amend tour resources

Where two or more tours make use of the same resource, e.g., a 4WD vehicle with 10 seats is used for both a two day safari and a three day safari, then the 4WD may be created as a resource (either on-the-fly within the tour master file or in the resource master file) and attached to each tour. Resource limits may then be set via this form to control the overall booking of the 4WD.

The Resource Limits screen may be used to create new resource limits for a specified date range or to query and amend existing resource limits.

It is not possible to create resource limits for Timed Departure style tours BUT, where bookings have been made on Timed Departure tours, the system automatically generates resource maximums equal to the relevant tour maximum. These auto generated resource limits CAN be amended via this screen.



**Resources should not be applied to package headers and are ignored for the purposes of calculating availability for a given package.**



**If a resource is applied to a package header that resource loading WILL be decremented when bookings of the package are made.**


<b>Resource</b>	Enter a resource code to query an existing resource.
<b>Details</b>	The long name or description of the resource is displayed
<b>Dates From/To</b>	Enter the date range for which the limits are to be applied or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the resource code and date range have been set then the Query Limits button may be used to display any existing

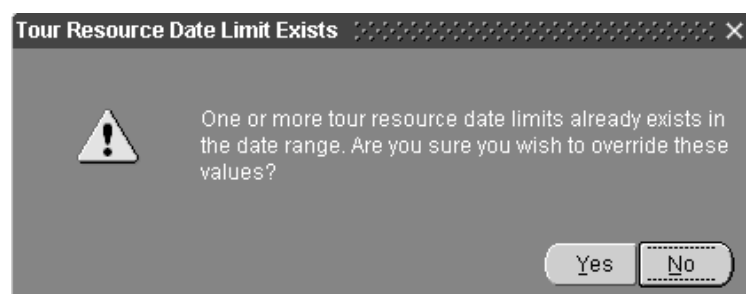
limits for the date range. These are displayed in the right hand portion of the screen and show Day, Date, Time, Maximum, Minimum, Booked, and Allotments.


To edit a single limit, overwrite the relevant figure in the list and commit the change.


<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week limits are to be created.
<b>Maximum Number of Pax to Set</b>	Specify the limit that is required to be set for the date range selected.

**Create Limits** Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.

 **Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected:**



<b>Max</b>	The limit in place for the resource on a particular date.
<b>Min</b>	Minimum passengers as per Tour and Package Maintenance.
<b>Detail</b>	Allows separate notes to be added against each date.
<b>Booked</b>	Total number of passengers booked on the resource on a particular date.
<b>Allotted</b>	The total of all allotments for the resource on a particular date. The Max figure INCLUDES any allotments.  When bookings are made from allotment, the Allotted figure is reduced and the Booked figure increased correspondingly.   See Agent Allotments later in this section

<b>Waitlist</b>	The total of all waitlisted passengers for the resource on a particular date.   <i>Waitlist limits do not apply to resources, but when tours associated with the resource are booked on waitlist then the resource is also waitlisted.</i> When bookings are confirmed from waitlist, the Waitlist figure is reduced and the Booked figure increased correspondingly.
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**Blocked** The total of block allocations for the tours or seat classes associated with the resource on a date (and time if Timed Departure tour). The Max figure EXCLUDES the block limit. Thus, when a block is created (see Block Allocations later in this section), the Max is reduced by the amount of the block.

When bookings are made from a block, the Blocked figure is reduced & the Booked AND Max figures are increased correspondingly.

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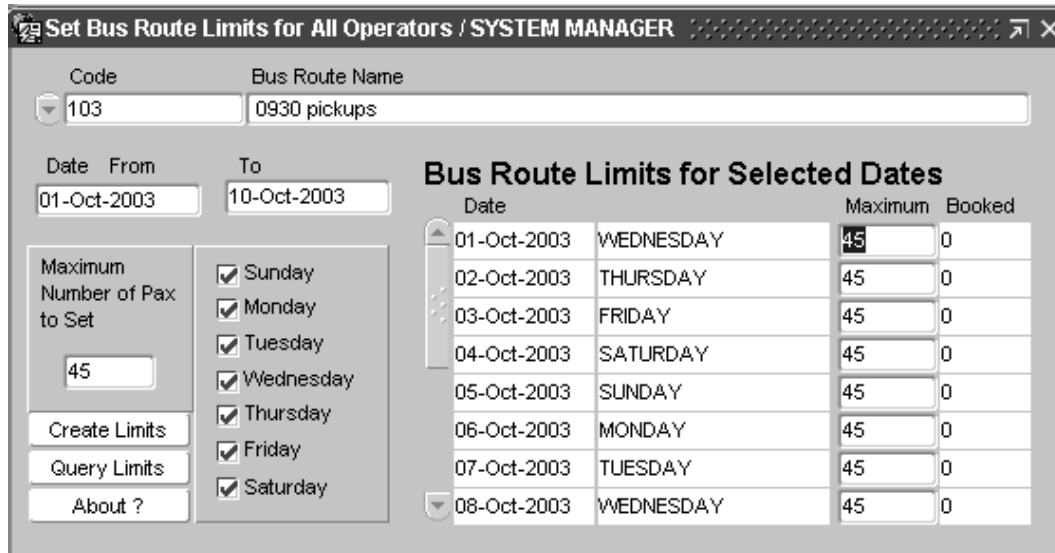
**HELD** The HELD figure represents the total number of passengers on a date (and time if Timed Departure tour) held from a block (see Section 6: Travel Workbench).

When components are held in Travel Workbench itineraries the Blocked figure is reduced correspondingly. When these held components are posted to reservations then the HELD figure is reduced, Blocked remains unchanged, & Booked AND Max are increased correspondingly.

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### 5.3.3 Bus Route Limits

Module Name	Access Path	Purpose
PTALLOB	Limits and Loadings/ Limits - Tours/ Bus Route Limits	To enter or amend passenger limits on bus routes



Bus route limits may be set where:

- A bus of a certain capacity is assigned to a route
- A number of buses with a maximum combined capacity are assigned to a route.

<b>Code</b>	Enter a bus route code to query an existing bus route.
<b>Bus Route Name</b>	The long name or description of the bus route is displayed.
<b>Dates From/To</b>	Enter the date range for which the limits are to be applied or within which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the bus route code and date range have been set the Query Limits button may be used to display any existing limits for the date range. These are displayed in the right hand portion of the screen and show Date, Day, Maximum & Booked.  To edit a single limit, overwrite the relevant figure in the list and commit the change.
<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week limits are to be created.

**Max Number of Pax to Set** Specify the limit that is required to be set for the date range selected.

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**Create Limits** When all data has been entered and checked the Create Limits button may be pressed and the limits created.

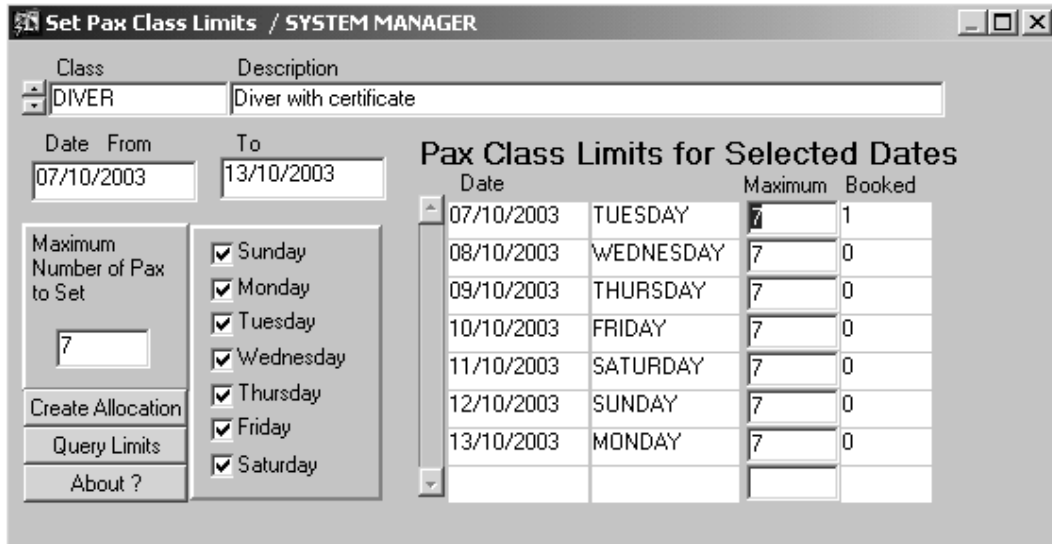


**Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.**

---

### 5.3.4 Passenger Class Limits

Module Name	Access Path	Purpose
PTCDLL	Limits and Loadings/ Limits - Tours/ Pax Class Limits	To enter or amend passenger class limits for a date or range of dates




**Passenger Class Limits are only available in the context of Simple Reservations bookings.**

Passenger Class Limits enables loadings limits to be set differently for different classes of passenger, e.g., if a boat has different capacities for divers and snorkelers then passenger class limits may be set to restrict bookings accordingly.

<b>Class</b>	Enter a passenger class code to query an existing passenger class.
<b>Description</b>	The long name or description of the passenger class is displayed.
<b>Dates From/To</b>	Enter the date range for which the limits are to be applied or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the passenger class code and date range have been set then the Query Limits button may be used to display any existing limits for the date range. These are displayed in the right hand portion of the screen and show Date, Day, Maximum & Booked.  To edit a single limit, overwrite the relevant figure in the list and commit the change.

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<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week limits are to be created.
<b>Max Number of Pax to Set</b>	Specify limit required for the date range selected.
<b>Create Limits</b>	Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.  <b>Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations.</b>

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## 5.3.5 Seat Class Limits

Module Name	Access Path	Purpose
PTSCDALL	Limits and Loadings/ Limits – Tours/ Seat Class Limits	To enter or amend seat class limits for a date or range of dates

Date	Maximum	Booked	Allotted	Waitlist	Blocked	HELD
THU 04-SEP-2003 00:00	50	0				
FRI 05-SEP-2003 00:00	50	3	0	0	0	
SAT 06-SEP-2003 00:00	50	0				
SUN 07-SEP-2003 00:00	50	0				
MON 08-SEP-2003 00:00	50	0				
TUE 09-SEP-2003 00:00	50	0				
WED 10-SEP-2003 00:00	50	0				
THU 11-SEP-2003 00:00	50	0				


Where Seat Allocation style tours are being used, seat class limits may be created to control capacity at the seat class level.



*Resource Limits cannot be used to control limits in the context of Seat allocation style tours. Seat Class Limits associated with a resource must be used. Tour Date Limits may be used in addition or as an alternative to Seat Class Limits.*

<b>Resource</b>	Query the resource associated with the seat class for which a seat class limit is required.
<b>Description</b>	The long name or description of the resource is displayed.
<b>Class</b>	Query the seat class code required.
<b>Description</b>	The long name or description of the seat class is displayed.
<b>Dates From/To</b>	Enter the date range for which the seat class limits are to be applied or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the resource, seat class code and date range have been set then the Query Limits button may be used to display any existing limits for the date range. These are displayed in the right hand portion of the screen and show Day, Date/Time Maximum, Booked, Allotted, Waitlist, Blocked, HELD.  To edit a single limit then simply overwrite the relevant figure in the list and commit the change.

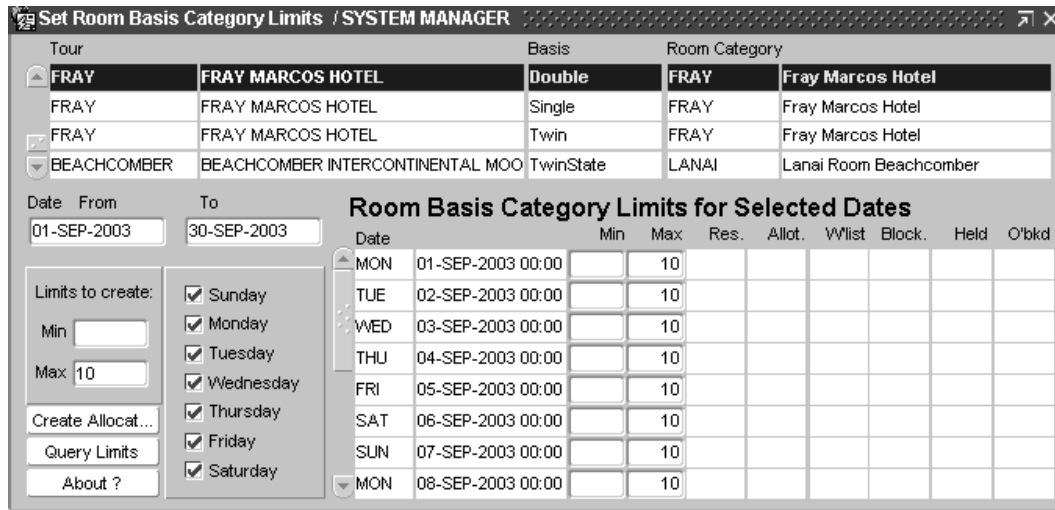
---

<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week limits are to be created.
<b>Maximum Number of Pax to Set</b>	Specify the limit that is required to be set for the date range selected.
<b>Create Limits</b>	<p>Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.</p> <p> <b>Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.</b></p>

---

### 5.3.6 Room Basis Category Limits

Module Name	Access Path	Purpose
PTALLRT	Limits and Loadings/ Limits - Tours/ Room Basis Category Limits	To enter or amend room category basis limits for a date or range of dates





For Accommodation style tours, Room Category Basis limits may be maintained to manage limits for different styles of accommodation, e.g., 10 Doubles, 5 Singles and 1 Triple available on 1-Sep-2003.



*Room Category Basis Limits may be used in conjunction with Room Category Limits but will always take precedence, e.g., if Room Category limit for FRAY = 50 rooms and Room Category Basis Limit for FRAY/Double = 10 rooms then a maximum of 10 Doubles can be booked. In the absence of any other Room Category Basis Limits, all other bases, e.g., Singles, Triples would be controlled by the Room Category Limit of 50.*

Bookings made against a Room Category Basis Limit decrement BOTH Room Category Basis Limits and Room Category Limits.

<b>Tour</b>	Code and Name of accommodation style tour. This is a multi record block. Highlight the record required for entry or review to refresh the lower block with the limits data.
<b>Basis</b>	Fare Basis associated with the accommodation style tour.  See Section 3: Accommodation
<b>Room Category</b>	Room Category Code and Name  See Section 3: Hotel Room Categories
<b>Date From/ To</b>	Enter the date range for which the Room Category Basis limits are to be applied or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field

will pop a calendar for date selection.

---

<b>Query Limits</b>	Once the tour and date range have been set then the Query Limits button may be used to display any existing limits for the date range. These are displayed in the right hand portion of the screen and show Day, Date/Time, Minimum, Maximum, Reserved (Booked), Allotted, Waitlist, Blocked, Held, Overbooked.
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<b>Min</b>	Enter the minimum number of rooms to be applied.
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<b>Max</b>	Enter the maximum number of rooms to be applied.
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<b>(Days of Week)</b>	Use the check boxes to indicate for which days of the week limits are to be created or reviewed.
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<b>Create Allocation</b>	Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.
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**Create Limits overwrites any existing limits with the value specified in the Maximum field. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.**

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## 5.3.7 Room Category Limits

Module Name	Access Path	Purpose
PTALLRM	Limits and Loadings/ Limits - Tours/ Room Category Limits	To enter or amend room category limits for a date or range of dates

For Accommodation style tours, Room Category limits may be maintained to manage room limits.



*Room Category Basis Limits may be used in conjunction with Room Category Limits but will always take precedence, e.g., if Room Category limit for FRAY = 50 rooms and Room Category Basis Limit for FRAY/Double = 10 rooms then a maximum of 10 Doubles can be booked. In the absence of any other Room Category Basis Limits, all other bases, e.g., Singles, Triples would be controlled by the Room Category Limit of 50.*

<b>Code / Description</b>	Name of the room category.
<b>SSR Code</b>	Code for special services applicable to this room category.
<b>Date From/ To</b>	Enter the date range for which the Room Category limits are to be applied or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the tour and date range have been set then the Query Limits button may be used to display any existing limits for the date range. These are displayed in the right hand portion of the screen and show Day, Date/Time, Reserved (Booked), Minimum, Maximum, Original, Blocked, Held, Waitlist, Allotted, Overbooked.
<b>Min</b>	Enter the minimum number of rooms to be applied.
<b>Max</b>	Enter the maximum number of rooms to be applied.

**(Days of Week)** Use the check boxes to indicate for which days of the week limits are to be created or reviewed

**Create Allocation** Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.



**Create Limits overwrites any existing limits with the value specified in Maximum field. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.**

**Limits Tab**

Day	Date	Limits			Released						Details			
		Reserved	Min	Max	Orig	Block	Held	Waitlist	Allotted	O'book				
MON	01-Sep-2003	20	0	10	25				0	0	0			
THU	04-Sep-2003		0	50	50									
FRI	05-Sep-2003	2	0	50	50				0	0	0			
SAT	06-Sep-2003		0	50	50									
SUN	07-Sep-2003		0	50	50									
MON	08-Sep-2003		0	50	50									
TUE	09-Sep-2003		0	50	50									
WED	10-Sep-2003		0	50	50									

**Reserved** Total number of rooms booked of this room category on a particular date.

**Min** Minimum number of rooms.

**Max** The maximum (limit) currently in place for the room category on a particular date.

**Orig** When the limit is first set on a date both the Maximum and Original fields are populated. If changes are made to limits then the revised figure ONLY updates the Max field.

**Block** The total block allocation for the room category on a date. The Maximum figure EXCLUDES the Block limit. Thus, when a block is created (see Block Allocations later in this section), the Maximum is reduced by the amount of the block.

When bookings are made from a block, the Blocked figure is reduced & the Reserved AND Maximum figures are increased correspondingly.

**Held** The Held figure represents the total number of rooms on a date held from a block (see Section 6: Travel Workbench). When components are held in Travel Workbench itineraries, the Block figure is reduced correspondingly.

When these held components are posted to reservations then the Held figure is reduced, Block remains unchanged, & Reserved AND Maximum are increased correspondingly.

**Waitlist** The total of all waitlisted rooms for the category on a particular date. The Max figure EXCLUDES the waitlist limit which is calculated as:

Maximum + Waitlist percentage  
 (see Section 2.1.2 System Parameters)  
 e.g., Limit = 60 and Waitlist Percentage = 10%  
 would allow 6 rooms to be waitlisted.

When bookings are made from waitlist, the Waitlist figure is reduced and the Reserved figure increased correspondingly.

**Allotted** The total of all agent allotments for the room category on a particular date. The Max figure INCLUDES any allotments.

When bookings are made from allotment, the Allotted figure is reduced and the Reserved figure increased correspondingly.

☞ See Agent Allotments later in this section

**O'book** The total of all overbooked rooms for the room category on a particular date.

**Released Tab**

		Limits	Released	Details
Day	Date	Release Date Released by		
THU	26-Jun-2003			
FRI	27-Jun-2003			
SAT	28-Jun-2003			
SUN	29-Jun-2003			
MON	30-Jun-2003			
FRI	11-Jul-2003	11-JUL-2003 08:15	SYSTEM MANAGER	
SAT	12-Jul-2003	11-JUL-2003 08:15	SYSTEM MANAGER	
SUN	13-Jul-2003			

**Release Date/ Released by** Provides details of date and time the limit was released, and by which employee. Display-only fields.

**Details Tab**

		Limits	Released	Details
Day	Date	Detail		
WED	01-NOV-2006	5 rooms out for cleaning / maintenance		
THU	02-NOV-2006			
FRI	03-NOV-2006			
SAT	04-NOV-2006			
SUN	05-NOV-2006			
MON	06-NOV-2006			
TUE	07-NOV-2006			
WED	08-NOV-2006			

**Detail** Allows separate notes to be added against each date.

## 5.3.8 Hotel Ranking

Module Name	Access Path	Purpose
PTTDRANK	Limits and Loadings/ Limits - Tours/ Hotel Ranking	To create, amend, or review hotel rankings for a date or range of dates

Date	Tour Code	Pax	Rm Res	Max Rm	Rank
10-OCT-2003	YKAHOTEL	2	2	40	0
10-OCT-2003	HOTEL3	0		40	1
10-OCT-2003	HOTEL2	0		25	2
10-OCT-2003	HOTEL1	0		30	3

Hotel Rankings may be used to control the order in which hotels are presented in the Set Hotels function of Compound Reservations. In the example below, hotels are presented in the order 3, 2, 1 corresponding to the rank set in the form above.



Setting Rank = 0 (zero) makes the hotel unavailable for selection from the Compound Reservation form. However, Rank = 0 and all other ranks are available via Confirm Waitlist/Generic option.



See Section 4: Confirm Waitlist/Generic



If rankings are not set then all Linked Hotels will be displayed for selection subject to availability and any other constraints.

Product	Date	Day	Time	Sq	Dys	Ad	Ch	A	B	FOC	Rms	Seat	Class	Basis	Tax	Value
GENERIC	10-Oct-03	FRI		10	1	2	0	0	0	0	2		Single		123.20	2123.20

<b>Hotel</b>	Enter code of generic accommodation style tour.
<b>Name</b>	The long name or description of the generic tour.
<b>Select Date Range</b>	Enter the date range for which rankings are to be made or within in which the query is to be applied.

Once the date range has been selected, the linked hotels associated with the generic tour specified will be displayed in the lower block.



**BOTH Room Category limits and Tour Date limits must exist for ranking to be available.**

<b>Date</b>	Date of hotel availability – display only.
<b>Tour Code</b>	Code of linked hotel relating to the generic tour selected – display only.
<b>Pax</b>	Number of passengers booked at this hotel on this date – display only
<b>Rooms Reserved</b>	Number of rooms booked at this hotel on this date – display only.
<b>Maximum Rooms</b>	Maximum number of rooms at this hotel on this date – display only.
<b>Rank</b>	Select rank to control order of presentation of linked hotels when using Set Hotels either from Compound Reservations or Confirm Waitlist/Generic:  Default = null 0 = hides hotel from display in Compound Reservations.
<b>Set buttons</b>	Use Set button to confirm ranking for a particular date.

# 5.4 Allotments & Blocks

## 5.4.1 Agent Tour Allotments

Module Name	Access Path	Purpose
PTALLOT	Limits and Loadings/ Allotments and Blocks/ Agent Allotments	To create, amend, or review agent allotments for a date or range of dates

This form may be used to create, amend and review agent allotments over a given date range for both tours and seat classes.




*When allotments are set on package headers, all components within the package have pseudo allotments set against them of the same quantity as the package header. For example, if a 3 Day Jungle Adventure package has a component of a canoe trip then setting an allotment of 5 passengers for Agent X on the package header will effectively reserve 5 passengers on the canoe trip for Agent X as well. This will control bookings of the canoe trip both as part of the Jungle Adventure package and as direct bookings of the canoe trip.*

*Note - These pseudo allotments can only be edited via the package header and are not available directly via this form.*



**Allotments should not be used on packages where the package contains accommodation style tours.**

<b>Agent</b>	Enter an agent code to query an existing agent.
<b>Name</b>	The long name or description of the agent is displayed.
<b>Tour</b>	Enter the tour code (list of values available) and tab to display the description.

<b>Seat Class</b>	If seat class allotments are required then click the Seat Class tab and enter the seat class code (list of values available) together with the associated resource code.
<b>Dates From/ To</b>	Enter the date range for which the allotment is to be made or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Times to Set</b>	With Timed Departure style tours (see Section 3: Tour and Package Maintenance) set the times to be queried or created.
<b>Query Limits</b>	<p>Once the tour code or seat class code and date range have been set then the Query Limits button may be used to display any existing allotments for this agent for the date range. These are displayed in the right hand portion of the screen and show Day, Date/Time, Pax No (Allotment), Release Days ( the number of days before day of travel that the allotment is to be released) and Release Time (the time that the allotment will be released) – in the example above, the allotments will be released at 1200hrs on the day before travel.</p> <p>To edit a single limit then simply overwrite the relevant figure in the list and commit the change.</p>
<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week allotments are to be created.
<b>Number of Pax</b>	Specify the passenger allotment limit that is required to be set for the date range selected.
<b>Default Release</b>	<p>Specify the number of days before travel that the allotment will be released and the time of day. In the example above, 1200hrs on the day before travel.</p> <p>The days and time are defaulted from the setting on the Tour and Package Maintenance form (see Section 3).</p>
<b>Detail</b>	Free text field to add comments against a specific date/time.
<b>Create Limits</b>	<p>Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.</p> <p> <b>Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.</b></p>

## 5.4.2 Room Agent Allotments

Module Name	Access Path	Purpose
PTRALLOT	Limits and Loadings/ Allotments and Blocks/ Room Agent Allotments	To create, amend, or review room agent allotments for a date or range of dates

This form may be used to create, amend and review room agent allotments over a given date range for both tours and seat classes.




**Allotments should not be used on packages where the package contains accommodation style tours.**

<b>Agent</b>	Enter an agent code to query an existing agent.
<b>Name</b>	The long name or description of the agent is displayed.
<b>Tour</b>	Enter the tour code (list of values available) and tab to display the description.
<b>Room Category</b>	Enter the room category code (list of values available).
<b>Dates From/ To</b>	Enter the date range for which the room allotment is to be made or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Query Limits</b>	Once the agent code, room category and date range have been set then the Query Limits button may be used to display any existing allotments for this agent for the date range. These are displayed in the right hand portion of the screen and show Day, Date, Rooms (Allotment), Release Days (the number of days before day of travel that the allotment is to be

released) and Release Time (the time that the allotment will be released) – in the example above, the allotments will be released at 0100hrs on the day before travel.

To edit a single limit, overwrite the relevant figure in the list and commit the change.

<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week allotments are to be created.
<b>Number of Rooms</b>	Specify the allotment limit that is required to be set for the date range selected.
<b>Default Release</b>	Specify the number of days before travel that the allotment will be released and the time of day. In the example above, 1200hrs on the day before travel.  The days and time are defaulted from the setting on the Tour and Package Maintenance form (see Section 3).
<b>Detail</b>	Free text field to add comments against a specific date/time.
<b>Create Limits</b>	Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.   <b>Create Limits overwrites any existing limits with the value specified in Maximum Number of Pax to Set. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.</b>


### 5.4.3 Block Allocations

Module Name	Access Path	Purpose
PTBLOCKS	Limits and Loadings/ Allotments and Blocks/ Block Allocations	To create, amend, or review block allocations for a date or range of dates

This form may be used to create, amend and block allocations to a group of agents over a given date range for both tours and seat classes.

<b>Org Type</b>	Enter an Organisation Type code (list of values available). ☞ See Section 3: Travel Agent Maintenance – Client Category
<b>Detail</b>	The long name or description of the organization type is displayed.
<b>Tour</b>	Enter the tour code (list of values available) and tab to display the description.
<b>Seat Class</b>	Seat Class blocks may also be set by using the Seat Class tab and entering the seat class and resource (lists of values available).
<b>Dates From/ To</b>	Enter the date range for which the block allocation is to be made or within in which the query is to be applied. Double clicking (or selecting [List of Values]) in either date field will pop a calendar for date selection.
<b>Times to Set</b>	With Timed Departure style tours (see Section 3: Tour and Package Maintenance) set the times to be queried or created.
<b>Query Limits</b>	Once the organization type, tour or seat class/resource and date range have been set then the Query Limits button may be used to display any existing allocations for this organization

type for the date range. These are displayed in the right hand portion of the screen and show Day, Date, Time (if Timed Departure style tour), Pax No (Block), Booked (the number of passengers booked from this block allocation), Held (the number of passenger's held in Travel Workbench against this allocation), Release Days ( the number of days before day of travel that the allotment is to be released) and Release Time (the time that the allotment will be released) – in the example above, the allotments will be released at 0100hrs on the day before travel.

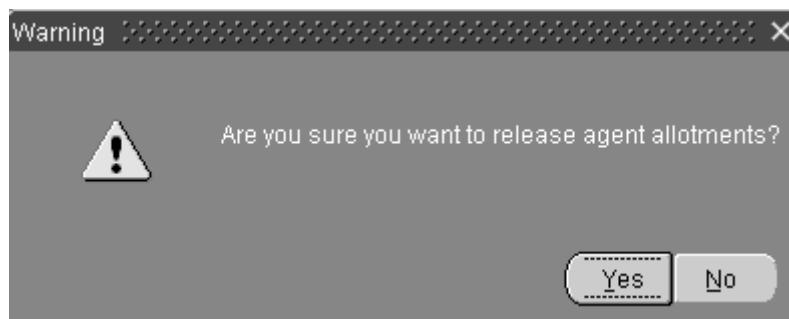
<b>(Days of the Week)</b>	Use the check boxes to indicate for which days of the week allocations are to be created.
<b>Number of Pax</b>	Specify the allocation limit that is required to be set for the date range selected.
<b>Default Release</b>	Specify the number of days before travel that the allotment will be released and the time of day. In the example above, 1200hrs on the day before travel.  The days and time are defaulted from the setting on the Tour and Package Maintenance form (see Section 3).
<b>Create Limits</b>	Once all of the above data has been entered and checked the Create Limits button may be pressed and the limits created.   <b>Create Limits overwrites any existing allocations with the value specified in Number of Pax. Care is needed, where bookings already exist, not to set the limit lower than the booked figure thus creating overbooking situations. A warning message appears when limits already exist within the date range selected.</b>

## 5.5 Limits Release

### 5.5.1 Release Allotments

Module Name	Access Path	Purpose
Script	Limits and Loadings/ Allotments and Blocks/ Release Agent Allotments	Runs a script to release all Agent Allotments due for release

This menu option provides a manual method for releasing agent allotments. After selecting the menu option a warning message is presented to the screen:



Selecting Yes will release any agent allotments that are due to have been released at the time this option is run.

Generally allotments are released at (say) 1200hrs the day before travel. Running the Release Allotments option at 1205hrs each day will ensure that unused allotments are released back for general sell.

## 5.5.2 Release Limits

Module Name	Access Path	Purpose
PTLIMREL	Limits and Loadings/ Limits - Tours/ Release Limits	Query and execute release of limits for both tours and room categories.

### Room Limits Release

Date	Category	No Reserv	Max	Waitlist	Allotted	Overbook	Max Orig	Pre-Rel	Release Date	Released By
26-SEP-2006 00	ABIROH	1	2	0	0	0	2		23-NOV-2006 09:07	Invalid Employee

### Tour Limits Release

Date	Tour Code	Max	Pre-Rel	Booked	Waitlist	Overbook	Allotted	Blocked	Held	Release Date	Released By
04-AUG-2006 00	GTFLAT	1	100	1	0	0	0	0	0	02-SEP-2006 1	99999999

Release Limits may be used for either Room Category limits (default) or Tour limits. The header information defines the limits to be released and the lower block shows details of released dates.

The Release Limits process sets the maximum availability for all tours or accommodation products that are set up with Limits Release data equal to the Booked/Reserved number subject to the criteria set in the header prior to release.



Once a limit (tour or room) has been released via Limits Release, cancellation of a booking that existed prior to the release will decrement BOTH the Booked and Max figures.

### Upper Block

**Room Limits/  
Tour Limits** Check the radio button appropriate to the limits to be released.



**Tour/Room  
Cat** Enter the code for the tour or room category from which limits are to be released.

**Process Date** Defaults to current date, but may be modified.

**Days Prior** Select from the drop list the limits to be released. In the screen shot the 1 Day prior products are selected.

<b>Starting From</b>	The date is defaulted by reference to the Process Date and the Days Prior value chosen.
<b>For</b>	Select from the drop list the number of days from the Process Date that the limits release is to be run, e.g., release all 30 Day prior limits for the 7 days commencing 15-Oct-2006.
<b>Release to Booked</b>	Once the release criteria have been set, use the Release to Booked button to action the release. Products released are then displayed in the lower block.
<b>Query</b>	Allows query of room categories or tours already released by reference to the parameters set in the upper block.





### Lower Block – Room Limits

<b>Date</b>	Date of tour or room category released.
<b>Category</b>	Room category code.
<b>No Reserv</b>	Number of rooms booked at the time of the release.
<b>Max</b>	Maximum rooms after release. The release process sets the Max figure to equal the Booked figure.
<b>Waitlist</b>	Displays total of waitlisted rooms.  <i>Waitlist listed bookings are not affected by Release Limits.</i>
<b>Allotted</b>	Displays the total of rooms on allotment.  <i>Rooms on allotment will be released as part of the Limits Release process and will therefore be set to zero.</i>
<b>Overbook</b>	Displays the total of overbooked rooms.
<b>Max Orig</b>	The Original maximum limit set for this room category.
<b>Pre-Rel</b>	The maximum limit immediately prior to the release.
<b>Release Date</b>	The date that the limits were released.
<b>Released By</b>	The name of the employee that ran the release.

### Lower Block – Tour Limits

<b>Date</b>	Date of tour or room category released.
<b>Tour Code</b>	Tour code.
<b>Max</b>	Maximum passengers after release. The release process sets the Max figure to equal the Booked figure.

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<b>Pre-Rel</b>	The maximum booking limit immediately prior to the release.
<b>Booked</b>	Number of passengers booked at the time of the release.
<b>Waitlist</b>	Displays total of waitlisted passengers.  <i>Waitlist listed bookings are not affected by Release Limits.</i>
<b>Overbook</b>	Displays the total of overbooked.
<b>Allotted</b>	Displays the total of allotments.  <i>Allotments will be released as part of the Limits Release process and will therefore be set to zero.</i>
<b>Blocked</b>	Total block allocation.  <i>Block Allocations are not affected by Release Limits.</i>
<b>Held</b>	Total numbers held from block allocation.  <i>Held numbers are not affected by Release Limits.</i>
<b>Release Date</b>	The date that the limits were released.
<b>Released By</b>	The name of the employee that ran the release.

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