

SECTION 6: TRAVEL WORKBENCH

Travel Workbench

Quotations

Booking Estimates

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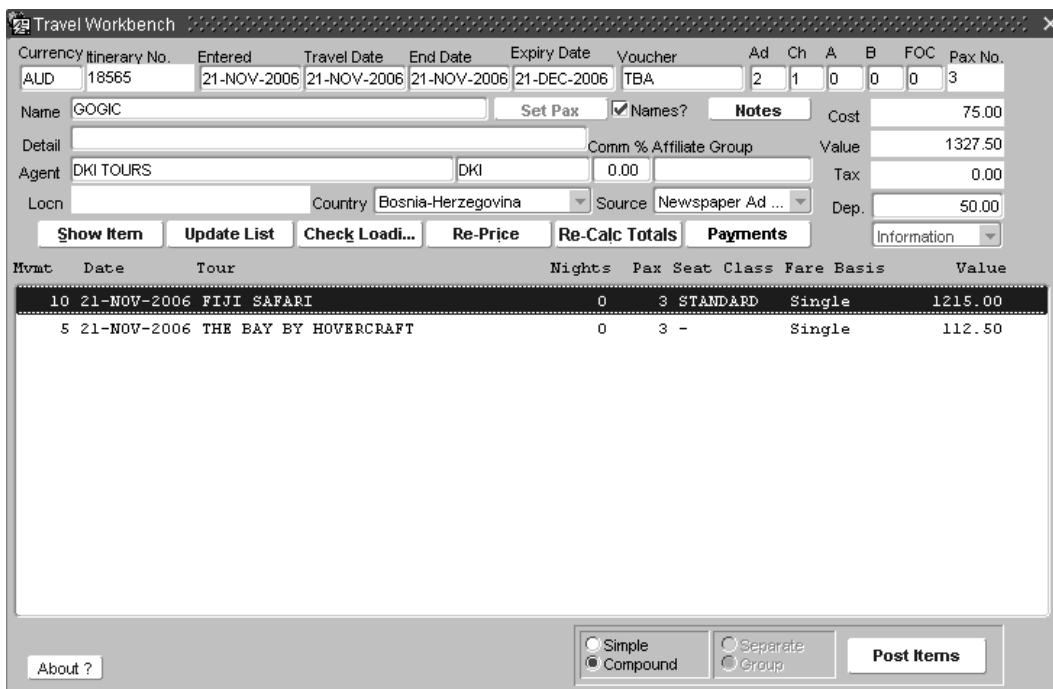
Travel Workbench

The Travel Workbench is designed as a flexible tool for the purposes of quotations, ad hoc custom itineraries, series and group bookings. It works in parallel with the reservation system and allows confirmed quotations and itineraries to be passed automatically into the reservations database.

6.1 Travel Workbench

6.1.1 Travel Workbench

Module Name	Access Path	Purpose
PTTRAVW	Reservations/ Quotations/ Travel Workbench	To enter or amend quotations, group and series itineraries, ad hoc custom itineraries





Travel Workbench is a two block form. The upper block maintains header and summary data and the lower block records details of the individual itinerary items.

While itineraries are being planned and held in Travel Workbench they are NOT drawing on live inventory. Only when the itinerary is posted to reservations is live inventory booked. Thus Travel Workbench can be used extensively for modeling, costing and quoting ad hoc, group or other potential bookings without affecting live inventory.

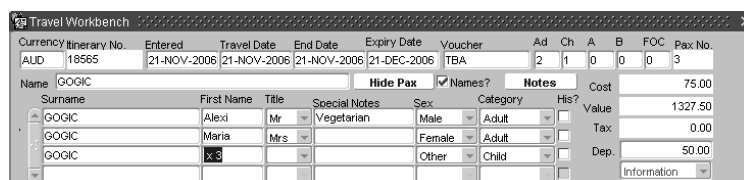
Upper Block

Currency The currency for this itinerary or quotation. Defaults to system base currency (list of values available).

Itinerary No Unique reference number assigned by PRO*Resort. This number is recorded on the Reservation as "Part Itinerary" if the itinerary is posted to reservations and may be used as a cross reference back to the Travel Workbench itinerary.

Entered	Date the itinerary was created – display only.
Travel Date	Departure date for this itinerary. Equates to Booking Date in reservations.
End Date	End date for this itinerary. When building the itinerary, this date is used to prevent components being added that fall beyond the end date.  <i>Leave the end date blank if it is not certain to avoid having to edit the header when the itinerary changes.</i>
Expiry Date	Date on which the itinerary or quotation expires.  See Section 7: Archiving for details of automatic purging of expired itineraries.
Voucher	The issuing agent's voucher number. Appears on manifests and other reports as appropriate.
Ad/Ch/A/B/FOC	Number of Adults, Children, Fare A, Fare B and FOC passengers.
Pax No	Total number of passengers (from the previous fields).
Name	The name for this booking. The individual passenger names may be added via Set Pax – see below.

Set Pax Use the Set Pax button to display a list of passengers on this itinerary:


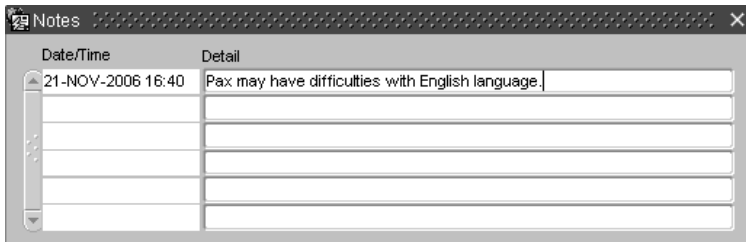


Add other details, e.g., first names, title, special notes, as required.

Steps to add passenger names:

1. Check the *Names?* Box (default)
2. Enter details in the Travel Workbench header and commit.
3. Re-query the itinerary
4. Use the Set Pax button to display the list of default names based upon the Name entered on the header and edit names as required.
5. Use [Save Record] or the Hide Pax button to hide names.

Names?	Checked (default) – a passenger name record is automatically created for each passenger, with Name used as the surname, and X1, X2, X3... being set as the first names. Unchecked – no separate passenger records are created and the Set Pax button is greyed out upon re-query.
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Detail	Text field which maps to: Compound Reservations – Bus Notes Simple Reservations – Comments
Agent	Enter the agent (list of values available) making the enquiry. Enter via long name or tab to agent code.
Comm %	Displays the default commission for this agent if any.  <i>Employees with Security Level 0 to 3 are able to override the default commission and set a custom commission that only applies to this itinerary.</i>
Affiliate Group	If the selected agent is a member of an Affiliate Group (see Section 3: Commission Groups) then the Affiliate Group code is displayed. If more than one affiliation exists then a list of values is displayed from which the appropriate affiliate group is chosen.
Locn	Displays the office location of the operator (set at time of logon) making the entry.
Country	A pop list is available for selection of the country of origin.
Source	A pop list is available for selection of the marketing source for this itinerary.
Notes	Press the Notes button to display:  Enter notes relevant to this itinerary. These notes are mapped to Reservation Notes in the reservations form. Label on Notes button changes to **Notes** when notes exist.
Cost	Displays total cost for this itinerary.
Value	Displays total value for this itinerary.
Tax	Displays total tax for this itinerary. Applies only to exclusive tax regimes.
Dep	Enter any agent deposit taken for this itinerary. Any amount entered here is mapped to Deposit by Agent field in reservations.

(Status)	Select from the pop list:
<i>Information</i>	default value
<i>Quote</i>	use as required
<i>Accepted</i>	an itinerary flagged as "Accepted" will not be deleted when Purge Travel Workbench Quotations option is run from the Financial Generator (see Section 7: Archiving)
<i>Declined</i>	use as required
<i>Posted</i>	automatically set by the system when the itinerary is posted to reservations.

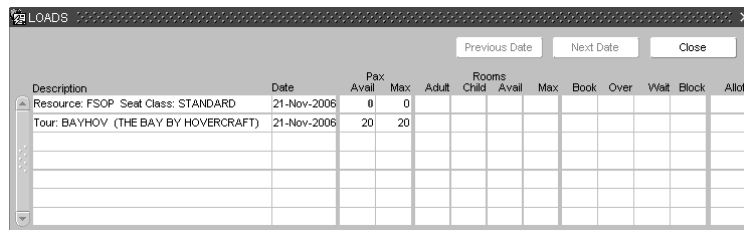
Once the itinerary header information is complete it must be saved before itinerary items can be added.

Show Item	Update List	Check Loading	Re-Price	Re-Calc Totals	Payments
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Show Item/ Show List Displays itinerary item entry/edit form in the lower block.
 Toggles the lower block to a view of the single itinerary item in focus at the time the button is pressed.
 Pressing the button when in itinerary item view toggles the lower block back to the list view of itinerary items.

Update List Refreshes the list during data entry edit.

Check Loading Once data is entered in the lower block – tour, basis, data, passengers – Check Loading may be used to check availability of itinerary item or package prior to accepting it:



Check Loading may also be used after itinerary items have been added and will display availability status of all itinerary items booked.

The Previous Date and Next Date allow review of availability before or after the date initially selected.

Re-Price Re-prices the entire itinerary based upon standard default data.



Any custom Cost or Sell entries will be over-written by the Re-Price option.

Re-Calc Totals

The following message displayed when the pricing summary in the header requires a forced refresh:

RE-CALC REQUIRED

Press the Re-Calc Totals button to re-calculate financial summary data.

Payments

Payments may be made against itineraries prior to posting to reservations.

See Section 7: Cashiering for full details on how to use this form.

Any cash style payments made in Travel Workbench will be processed by the Financial Generator per the date of the transaction in the same way as reservations. In the Financial Generator, Workbench transactions are highlighted in blue.






Lower Block – Item





Tour/ Description

Enter the tour or package code to be added to the itinerary (list of values available).



To add an item to an existing itinerary use New Record (green cross) with the cursor focus on the Tour field. When a valid tour has been chosen a Description will be displayed.

	<i>Employees with Security Level 0 to 3 are able to override the default description and add a custom description for this itinerary only. The custom description is posted to reservations.</i>
Qty	For tours set to Per Day pricing (see Section 3: Pricing) the defaulted quantity may be amended as required, e.g., if 3 night accommodation is required, or 2 days car hire.
Seat Class	Enter the seat class (list of values available).  <i>Only applicable to seat allocation style tours. The field is hidden for all other styles.</i>
Basis	Enter the fare basis (list of values available).
Movement	A movement or sequence number is assigned to each new itinerary item added. Increments of 5 are used for individual items added and of 4 for items resulting from a package explode. Items displayed in the list are sorted by date and then movement number and the same sequence is maintained when posting to reservations.
I/Function	Itinerary function provides a method for grouping itinerary items for reporting purposes.  See Section 3: Itinerary Functions
Start Date	Enter the start date for this itinerary item. Defaults to the Travel Date specified on the header.
End Date	Calculated automatically by reference to the Start Date and Qty (number of days duration of the itinerary item) fields.
Ad/Ch/A/B/FOC	Number of passengers by type. Displays values from header.  <i>Passenger numbers on an itinerary item may be changed using the Set Pax function – see below in Other Tools and Functions.</i>
Orig No	When the number of passengers on an item is changed via Set Pax, the total original number booked is saved and displayed adjacent to the total current number booked.
Discount Type	A pop list of passenger discounts.  See Section 3: Passenger Types
Pickup	Enter the pickup point code (list of values available).
Dropoff	Enter the dropoff point code (list of values available).

Services	<p>The services text box is automatically populated with any Voucher Notes entered on the tour master file (see Section 3: Tour & Package Maintenance).</p> <p>The defaulted voucher notes may be amended as required for this itinerary.</p>
Cost	<p>Total cost of this itinerary item.</p>  <p><i>Employees with Security Level 0 to 3 are able to override the default cost and add a custom cost for this itinerary only. The custom cost is posted to reservations where further edit is not allowed.</i></p>
Sell	<p>Total sell price of this itinerary item.</p>  <p><i>Employees with Security Level 0 to 3 are able to override the default sell and add a custom sell for this itinerary only. The custom sell is posted to reservations where further edit is not allowed.</i></p>
Value	<p>Total value of this itinerary item (including tax where applicable).</p> <p>Value = Sell – agent and passenger discounts.</p>
Tax	<p>Total tax on this itinerary item. Only applies to non-inclusive tax regimes.</p>
Comments	<p>Free text notes field.</p>  <p><i>This field is not posted to reservations and exists only in Travel Workbench.</i></p>
Source Package	<p>When a package is exploded in Travel Workbench, the tour code of the package is displayed against each itinerary created from the explode.</p>  <p><i>This field not visible on the reservation form after posting from Travel Workbench.</i></p>
Explode	<p>A special function that may be applied to packages that makes separate entries for each component and presents them in the list for further editing as required.</p> <p>Prerequisites:</p> <ol style="list-style-type: none"> All components of the package to be exploded must have their Component Only boxes unchecked in the Tour Master. <p>Consequences:</p> <ol style="list-style-type: none"> All package header detail is discarded by the explode process – in particular this means that package pricing must be handled at the component level. (<i>HINT: it may be useful to create dummy components simply to handle pricing if full component level pricing is not required</i>).

- b. Once exploded, the components are treated as separate itinerary items by PRO*Resort. This means that any subsequent changes to passenger numbers, dates, costs, etc, must be entirely managed by the user.
- c. The original package code is displayed in the Source Package field of each item.

Accept Commits or saves the itinerary item.

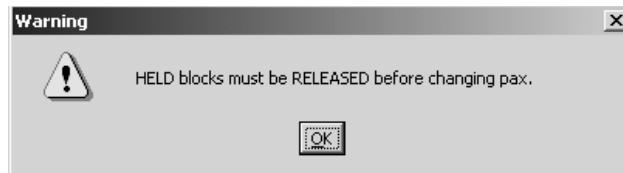
Hold/Release Where a block allocation exists for the Organisation Type (Client Category) with which the booking agent is associated. (see Section 3: Travel Agent Maintenance and Section 5: Block Allocations) then the Hold button is enabled after the item is committed/saved.

Use the Hold button to hold inventory from block for this itinerary item. For example, a block allocation of 50 First Class rail seats is made for Inbound Agents (where Client Category on the Travel Agent master file is set to Inbound). A Travel Workbench itinerary/quotation is prepared for Agent X who belongs to Client Category Inbound that includes a First Class rail component. Using the Hold function, Agent X is then sub-allocated the number of seats required from the overall block. At any stage, the Held inventory can be released using the Release button. (The Hold button changes to Release once a hold is in place.)



Unlike Agent Allotments, held block is released back to the original block rather than to free sell inventory.

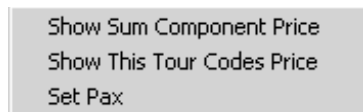
Passenger numbers cannot be adjusted on the item using Set Pax unless any Held inventory is released. The following warning message is displayed:



When itineraries are posted to reservations any items that are the subject of block allocations, or are held from a block allocation, are moved to booked.

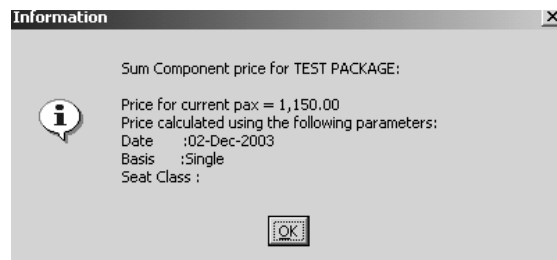
Other Tools and Functions

Right mouse click with the focus on Tour to display:



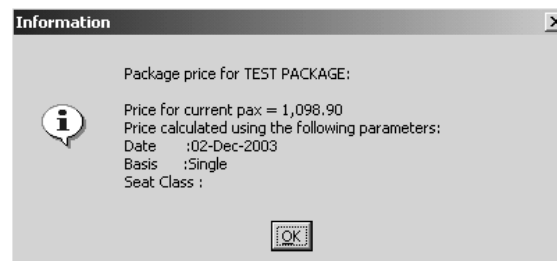
Show Sum Component Price This function may be used before or after adding the item to the itinerary. For a multi component package it displays the sell price of the component as the sum of the package

component sell prices, i.e., as happens in Compound Reservations when the Explode option is used:



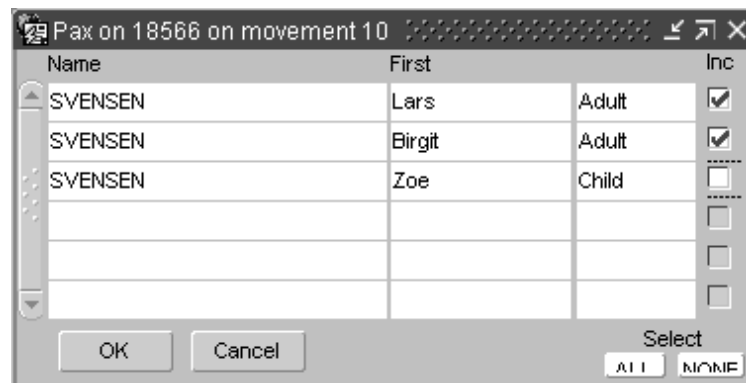
Show This Tour Codes Price

This function may be used before or after adding the item to the itinerary. For a multi component package it displays the sell price of the package header only, i.e., as happens in Simple & Compound Reservations when packages are not exploded but simply booked as packages:



Set Pax

This function is only available after an item has been added to an itinerary.



Passengers may be included or excluded from individual items by checking or unchecking the Inc flag.



When adding an item, the system automatically includes all passengers on the itinerary item (as defined on the itinerary header). Once the item is added, passenger numbers may be adjusted as required using this function.

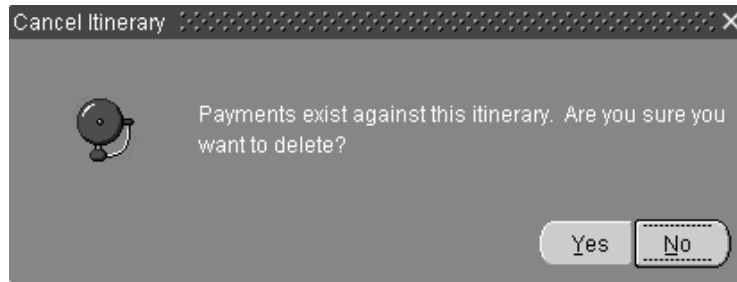
Use the All and None buttons to select or deselect all passengers as required or make any changes individually using the mouse.

Tools

From the menu bar the Tools menu provides access to the following functions:

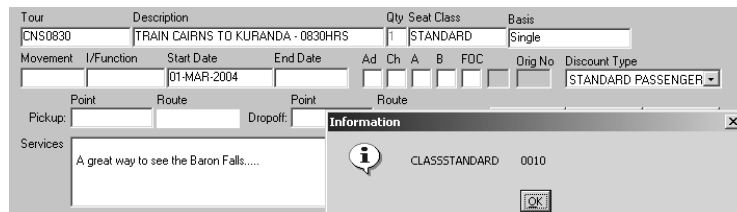
Cancel Itinerary

Quotations may be cancelled at any time. A warning message appears if payments exist. It is recommended that payments be refunded prior to cancellation to ensure consistency of financial data.



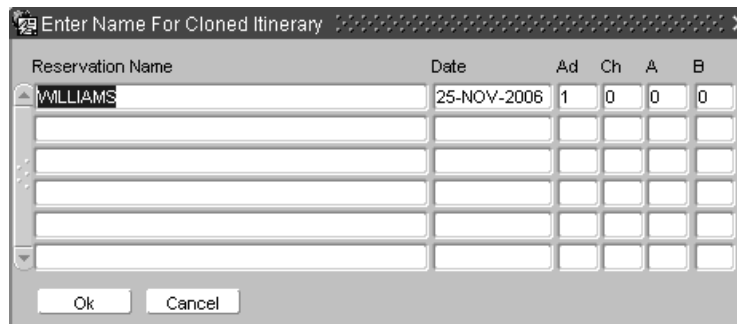
Check Block

When a block allocation tour is entered in the lower block, this function enables the quantity of block remaining for this agent group for this product for this date to be checked. In the example below, 10 Standard Class seats are available from block for Tropical Horizons on 1 March 2004.



Clone Itinerary

An itinerary may be cloned to one or more dates. For each date required enter the booking name and number of each category of passenger:



After acceptance, new itineraries are created and can be viewed in Travel Workbench, with the first clone in the list being automatically displayed.



Cloning does not:

- i. Clone any payments
- ii. Clone any Holds on Block

Passenger Search

Use this form to search for itineraries/quotations via the passenger name:

Pax Name	First Name	Date	DD-MON-YY	Travel Agent Name	Code	ACN	Cfm No
GOGIC	Alexi	21-NOV-2006		DKI TOURS	DKI	1234	18565
GOGIC	Jen	21-NOV-2006		DKI TOURS	DKI	1234	18565
GOGIC	Lars	21-NOV-2006		DKI TOURS	DKI	1234	18565
GOGIC	Maria	21-NOV-2006		DKI TOURS	DKI	1234	18565

Double click the required record to load the quotation into the Travel Workbench.

New Agent

Created a new agent from within the Travel Workbench, or review the details of an existing agent by using the option with the focus on the agent code already entered in the upper block of the form:

Lower Block – list

Mvmt	Date	Tour	Nights	Pax	Seat Class	Fare Basis	Value
32	13-Nov-2003	DURANGO TO SILVERTON RAIL	0	2	GONDOLA	Single	68.00
37	13-Nov-2003	TRAIN CAIRNS TO KURANDA - 0830HRS	0	2	STANDARD	Single	68.00
42	13-Nov-2003	TRAIN KURANDA TO CAIRNS- 1400HRS	0	2	-	Single	
52	13-Nov-2003	CANOE PER DAY	0	2	-	Single	106.16
27	15-Nov-2003	TJAPUKAI CULTURAL PARK	0	2	-	Single	54.00
57	24-Nov-2003	CANOE PER DAY	0	2	-	Single	
10	02-Dec-2003	EXPLORER PACKAGE	0	2	-	Single	.00
14	02-Dec-2003	TEST TOUR TEST TOUR TEST TOUR TEST	0	2	-	Single	250.83
18	02-Dec-2003	PICK UP NTH BEACHES TO SKY	0	2	-	Single	106.16
22	03-Dec-2003	CANOE PER DAY	1	2	-	Single	1184.75
47	03-Dec-2003	CANOE PER DAY	0	2	-	Single	106.16

Mvmt

A movement or sequence number is assigned to each new itinerary item added. Increments of 5 are used for individual items added and of 4 for items resulting from a package explode.

Items displayed in the list are sorted by date and then movement number and the same sequence is maintained when posting to reservations.

Date	Travel date of this itinerary item.
Tour	Tour or package name.
Nights	Number (Quantity) of days/nights for this item.
Pax	Number of passengers for this item.
Seat Class	Seat class, for seat allocation style tours.
Fare Basis	Fare basis.
Value	Total value, including tax where applicable, for this item.



Clicking on an item in the list displays that item in edit mode.

Posting Itineraries/Quotations to Reservations



Once a quotation or itinerary has been finalized it may be posted to reservations using the Post Items button.

Travel Workbench defaults to either Simple or Compound by reference to the system parameter DEFAULT_RES_STYLE.



See Section 2: System Parameters

Simple – Separate

Used when posting to Simple Reservations. A separate booking is made for every passenger for every item of the itinerary.



The itinerary number is posted to the header of the reservation as *Linked Reservations* for cross-reference and reporting purposes.

Simple – Group

Is the same as Simple Group except that a separate booking is created for each item of the itinerary.

Compound

Used when posting to Compound Reservations. A single booking is created with a separate component for each itinerary item.



The itinerary number is posted to the header of the reservation as *Part Itinerary* for cross-reference and reporting purposes.

6.1.2 Future Booking Estimates

Module Name	Access Path	Purpose
PTIEST	Reservations/ Enter/Edit/ Booking Estimates	To review and edit booking estimates for Seat Style products

Date	Itin No	Booking Name	Client#	Tour Code	Class	Orig	Act	Est	Posted
18-NOV-2003	1132	Single BLOCKING	TH	CNS0830	STANDAR 3	2	2	2	Posted
18-NOV-2003	1135	Single MORE ESTIMATES	1	CNS0830	STANDAR 2	2	2	2	Accepted
28-NOV-2003	1131	Single PACKAGE	TH	CNS0830	STANDAR 2	1	1	1	Posted

The Future Bookings Estimates form may be used in conjunction with Travel Workbench to provide reporting data for estimating purposes of bookings made from block allocations. The form is limited to use with Seat style tours only. It may be used in conjunction with the Block Summary and Estimates by Class report (PTBLKSUM).

Upper Query Block

From/To Date	Specify the travel date range required. The date refers to the date of travel of the seat style itinerary item and not the travel date of the itinerary header.
Seat Class	Use the pop list to select a specific seat class or select all to include all seat classes.
Org Type	Use the pop list to select a organisation type or select all to include all organisation types.

Lower List Block



Only Seat style tours created from block allocations are included.

Date	Travel date of the item.
Itin No	Itinerary number to which the item belongs.
(Fare Basis)	Fare Basis applicable to this item.
Booking Name	Booking name on the itinerary header.
Client #	Travel agent code.
Tour Code	Itinerary item code.
Class	Seat class.

Orig The total original number of passengers booked on this item.

Act The actual number of passengers currently booked.

Est The estimated number of passengers that will travel.



When the itinerary is posted to reservations, the Estimate figure is set to equal the Actual figure booked.
