SOFTSUITCASE MANUAL

This manual contains the more advanced features available in SoftSuitCase**7** LITE.

How to setup SoftSuitCase the first time and how to use it on a daily basis.

TravelOffice

SOFTSUITCASE
DANSK - VER. 7

LITE

INDEX

SoftFares 7 wp

SoftFares are also available in a version for Microsoft and Nokia's new smartphones coming to Scandinavia in September.

The app only works if you already use SoftFares SL.

The app can be downloaded from the phone's marketplace. Search for SoftFares. The price has still to be determined but we expect it to be around 200,00 DKK per phone.

Looking for a good mid-and back office for your Travel Agency?

Contact TravelOffice for a free demonstration!

SoftSuitCase LITE
Installation and Setup

INSTALLATION AND DATABASE

SoftSuitCase software

To find the SoftSuitCase software, go to:

http://www.softsuitcase.com

Select **DOWNLOAD** at the top of the screen:

We are always adding new software to the list, but here are some examples:

SoftSuitCase.
Here you can find the latest and previous versions of the SoftSuitCase software.

Transfer from CRS
This software is used to transfer information from all four CRS's to SoftSuitCase.

SoftAmadeus
A simple Amadeus screen that can be used away from the office, etc., The software can be used simultaneously with Amadeus Vista (Selling Platform).

SoftFares
Sales tool and ticket robot. Contact the issuing agencies for further information.

In addition, there is a wide range of other software and utilities, briefly described below:

SQL Native Client
Communication program between SoftSuitCase and the database. It is included in the download of most of our software.

Crystal Reports Framework
Report tool. It is included in the download of most of our software.

.Net Framework
Framework for SoftSuitCase. It is included in the download of most of our software.

The database is usually installed, but if you need a new database, this can be downloaded from database section, select:

Database Setup for Soft SuitCase

In order to setup SoftSuitCase, it is necessary to have the database Setup program installed on at least one PC in Travel Agency. The program is also used for the overall maintenance of SoftSuitCase. Select:

Update Database Setup for Soft SuitCase
in order to install the application on your PC.

See further information in the manual , under Database Setup.

In order to correctly download and install the software on your PC, you should use Microsoft Internet Explorer as the WEB browser.

INSTALLATION AND LOGIN

Installation of SoftSuitCase
Install SoftSuitCase, as described on the previous page. If during the installation there are any questions or warnings, answer Yes. When the installation is complete, the following setup window will appear:

Amadeus Office ID is your Office ID in Amadeus.

The Database type is almost always Microsoft SQL

IP address is the IP address of the server where the SoftSuitCase Database is located.

Server is the name of the SQL database. (SQLEXPRESS)

Database Name is the name of the Database Setup database which by default is called (SuitCaseSetup).

Database Username is almost always: sa

Database password is your administrator's database password.

Press Check Connection. If the Setup is OK, it must be saved with the SAVE, and SoftSuitCase must be restarted.

If you had previously installed SoftSuitCase on your PC, you can retrieve the last saved settings in the Menu Item EDIT, and then GET GENERAL SETTINGS. This feature reinstalls the last saved Setup Settings.

Fill out the Setup data that will be used when installing a new PC at your Travel Agency.

Sabre / Worldspan / PCC / Amadeus Office ID:

Database type:

Microsoft SQL

IP adresse:

Server:

Database name:

SuitCaseSetup

Database Username:

sa

Database password:

Report directory:

Licenses
You can purchase as many licenses as you wish. You can always install SoftSuitCase on a new workstation, and it will work for 5 days after the installation. However it is important that if you have ordered and paid for new license, that you register that new license before the 5 days have elapsed or the software at that work station will stop working.

SoftSuitCase Setup

SoftSuitCase Setup
The Menu for General Setup and maintenance can be found under the Menu > Administration > Maintenance.
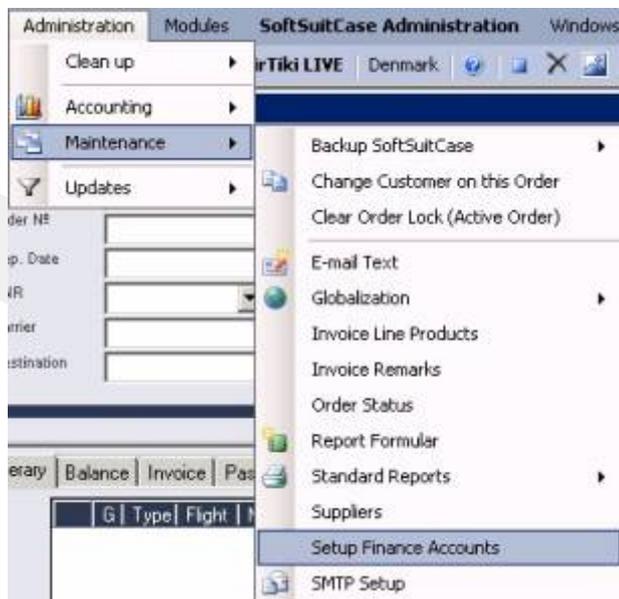
The first to be set up is the accounts information. Select Setup Finance Account

The following window will appear:
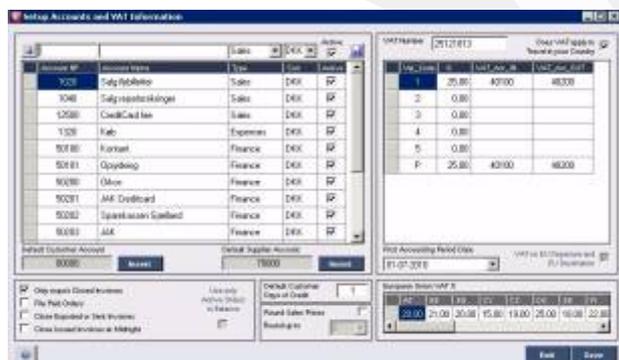
Create the necessary accounts. There must be at least one of each of the following types:

Sales
Expenses
Customer
Supplier
Finance

Sales are Sales Accounts, which are used to invoice a customer.

Expenses are the associated Purchase Accounts. Expenses Accounts are not used by all agencies, but it is nevertheless necessary, with at least one account of this type.

Customer accounts are created to collect what your customers owe you. You must at least enter the default Customer Account but you can also have additional customer accounts for your business customers.

Supplier accounts are the vendor accounts. Where what you owe is collected. You must at least enter the default Supplier Account but you can also have additional Supplier accounts to collect what you owe individual suppliers, for example BSP, Diners Travel Account, AirPlus etc..

Finance accounts are the accounts you create to be your bank and cash accounts, where you will be receiving your customer's payments.

To Create new account
Fill in the relevant fields and press Save.

To Delete an account
Select the account by pressing the gray box to the left of the text, and then press DELETE.

You cannot delete an account that has been used, but it can be made inactive, so it will not be shown as an option when selecting accounts.

Under Default Customer and Supplier accounts, you must specify which Customer and Supplier account that will be the default account.

You must also decide how your invoices will be closed and exported. Only export Closed Invoices: Invoice is closed only upon payment or approval. Close exported or Sent Invoices: Invoice will be closed as soon as it is sent or printed. Close Invoice Issued at midnight: Invoice closes at midnight.

Default Customer Days of Credit: Specifies the default credit. For example, 7, specifies that the customer must pay before 7 days after invoicing. -45 specifies that the customer must pay 45 days before departure.

It is also possible to have the system automatically round up to the nearest whole amount, etc.

If you use Sales Tax, check the box. A box to enter your VAT number is provided. You must also specify, what the percentages are for each Tax Code from 1-5 and what accounts they will use. VAT code P is a European marginal Vat, which is used to charge VAT on the profit of the journey, if both departure and destination are located within the European Union.

INSTALLING THE DATABASE

Installing the database
In the majority of cases, the database will be installed and set up by TravelOffice. However if you wish to do the installation yourself, first contact the TravelOffice Help Desk and get assistance with the setup.

After the database is installed, the system must be set up for your Travel Agency.

On the left side provides of the menu, select: Database Settings and Credit Card

Database:
Enter the Travel Agent's name, address, telephone number, etc.

Enter your OfficeID, or IPCC or ID for the CRS, that you use. By default, a maximum of 2 CRS is allowed. If you have more you must have a separate license.

For the IPCC from Sabre, you must enter the User, Password and Host.

Then press Save Settings.

Press Settings on the left side of the form.

Enter or modify the information, and press the Save Settings.

On the right, you can see whether the system is properly installed. The must be an OK next to all the menu items.

At the bottom of the screen you can:

1. Download all reports to the system.

2. Verify the local settings.

3. Upload logo (770x230) for use by all prints.

4. Upload logo left (60x120) for use by all prints.

5. Upload logo right (60x120) for use by all prints.

User Setup

Setting up theEmployees or Users.
Each employee or user must be set up in
SoftSuitCase. It takes place in Maintenance,
followed by User Setup.

The following screen appears:
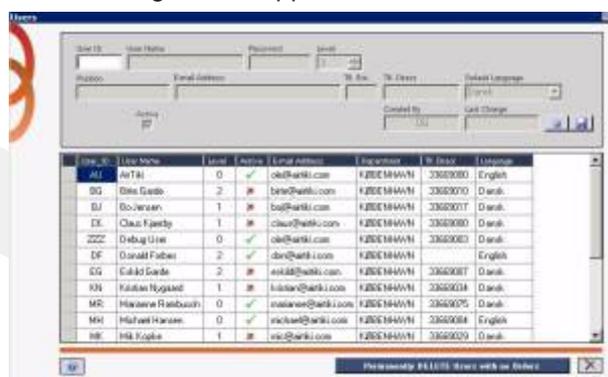
Click the gray box next to each employee or user, if
you want to edit a change.

To create a new user, enter the user's initials in the
User ID box, and then press ENTER. Fill in the
necessary fields.

A user cannot be deleted, but can be made
inactive.

Description of individual fields

User ID
User login. Max. 3 characters

User name
User'ss full name

Password
Users's password

Security
The user's Level:
0: Supervisor
1: Bookkeeper/Department Manager
2: Super User
3: User (0)
4: User (1)
5. Student or similar.
6: Limited Read only!

See product sheet on User levels.

Position:
The employee's position within the company

Email:
Employee's Email

Tel. EXT:
Employee's extension

Tel. Direct
The employee's direct phone number

Default language
The language the employee wishes to use as the
default display language.
In the current version supported:
1. English (UK)
2. English (US)
3. Spanish
4. Danish
5. Swedish
6. Norwegian (Under development)

Active:
If there is X in this field, the employee cannot log into
SoftSuitCase.

Suppliers and SMTP Host

Before creating the Invoice Line Products you must have created the suppliers of those products.

In the menu, Administration, Maintenance, and then Suppliers.

Explanation for each field:

Name, address, country, etc.
Fill in the name and address of the supplier

IATA:
3 letter IATA code

Ccode:
Telephone Country Code.

Acode:
Telephone Area or City Code.

Email:
One or more Email addresses. Press + to add an Email address and a Contact name.

Remarks
Remarks about the supplier

Supplier Group:
Optional field

Vendor account:
Select from the list

Form Of Payment:
Agreement about the payment to the vendor.

Press NEW to create a new vendor.

Press the Supplier List button, to see a list of the suppliers created.

SMTP Host Setup is required in order to send e-mails from SoftSuitCase. It is possible to have a common SMTP or individual SMTPs.

SMTP Setup must include what your Internet Service Provider (ISP) requires. If your (ISP) uses the Authentication mode, enter appropriate the username and password.

If for example you have installed SoftSuitCase on a portable computer, the SMTP could change every time you move your computer to a new Internet Service Provider (ISP).

This is done by selecting the Local Settings.

INVOICE LINE PRODUCTS

Invoice Line Products
Invoice Line Products are created or edited in the Menu, Administration, Maintenance and then Invoice Line Products.

These products must be created before you can invoice in SoftSuitCase. The Invoice Line Products makes it easier to invoice, and at the same time keeps the track of which accounts the Invoice Line Products are supposed to access.

The following screen appears:

Press LIST to find existing Invoice Line Products.

Press NEW to create a new Invoice Line Product.

Press SAVE to save a new or edited Invoice Line Product.

Review of the individual fields:

ProductID:
Product code, as it is used in the invoice

Type:
N: Normal
This type is the most common, and is typically used when creating a new product.

H: Hidden. Must contain only net price
A hidden line is used for example. to hide an issuing fee. Does not show up in the Customer's invoice.

Included Products : Generates an invoice Line for each included product.

Sales Account : The list of Sales Accounts are shown for your selection.

Mark up : Check, if you want the system calculate the SALES PRICE from the net price. Enter an amount or a percentage.

Commission : Check, if you want the system calculate the NET PRICE from the sales price. . Enter an amount or a percentage.

% field : The percentage you want to use for either Mark up or Commission.

Net price : Any fixed net price

Sales price : Any fixed sales price

VAT : There are 6 different VAT types in SoftSuitCase. **1-5 are percentages. P is the EU marginal sales tax.**

Supplier Information : The supplier that is associated with this product. Select a Supplier from the LIST.

GLOBALIZATION

Globalization is where you manage your cities, countries, etc., in several different languages.

In addition to the standard IATA cities and countries, it is possible to create your own, or to amend the information.

Most of the information can be stored in the written language created in SoftSuitCase

Globalization includes the following subsections:

Carriers
Cities and Airports
Countries
Currencies
Regions

Here's a description of the different screens:

Carriers

Enter the airline 2-letter IATA Code in this field. If you need to edit an existing airline, we must first find it, and then click in the gray box to the left.

Press NEW to create a new airline

Cities and Airports
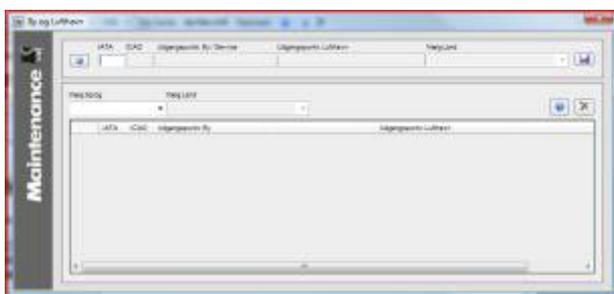
Enter the City, Airport or Service IATA 3 letter Identifier in this field. If you need to edit in an existing City, Airport or Service, you must first find it and then click in the gray box to the left.

Press NEW to create a new City, Airport or Service.

You can also search for Cities, Airports or Services by selecting the language and country.

Countries
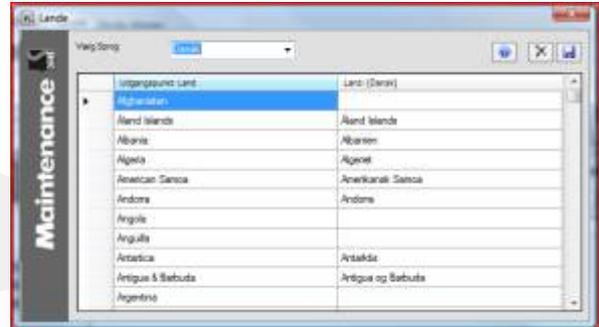
Select the name of the country in English. If it's called something else in another language, it is possible to enter it here.

Enter the country name and press SAVE

The Regions
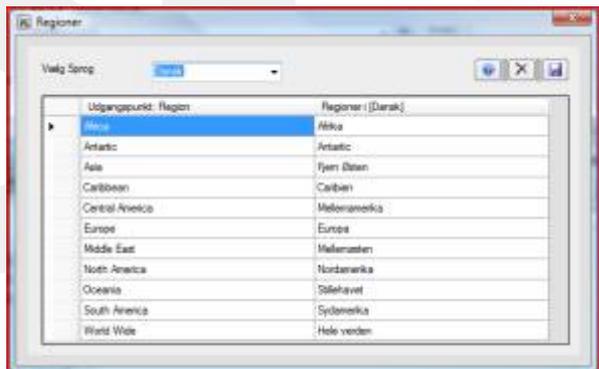
Select the region's name in English. If it's called something else in another language, it is possible to enter it here.

Enter the Region Name and press SAVE.

Currencies
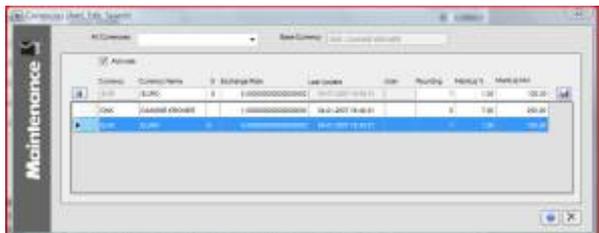
Create and maintain exchange rates for invoices and/ or payments in foreign currencies.

Order status

Order Status is a feature that keeps track of what each order's status is.

Select Administration, Maintenance and the Order Status. The following screen appears:
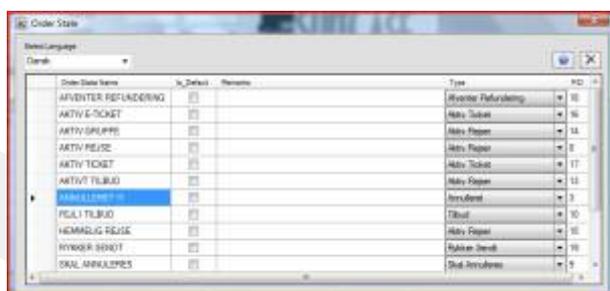
You can edit the individual Statuses by changing the text under the Order State Name.

This is a LIST of types that can be used:

Quotes
Reminder sent
Active Travel
Canceled
Should Be Canceled
Awaiting refund
Under Preparation
Active Ticket
Active Quote

There must at least one of each category.

One of the Statuses must be the default. The Default Status will be used automatically every time a new Order is created.

Explanations or descriptions can be added to each.

What is the Order status?

Order status is a part of the core of SoftSuitCase. Normally, an Order is a quote by default and it has a quotation date. If your order has not been paid or confirmed at the latest on the quotation date, then the order is put in a list, from where it can be extended or the order can be deleted

The list is called Clean Up!

Clean Up is located under Administration.

The screen looks like this:
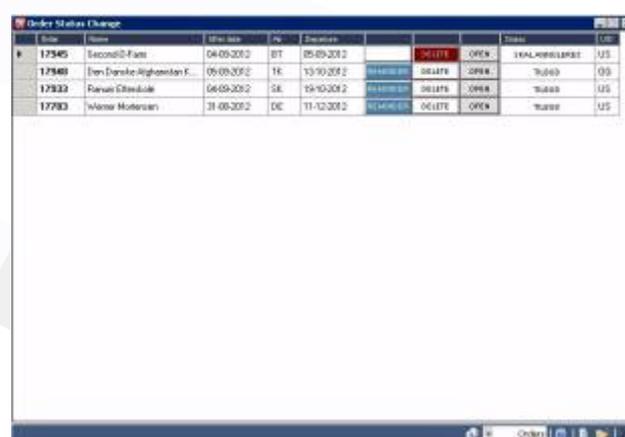
An order whose quotation date has expired will allow you to send a reminder to the customer by simply pressing the REMINDER button.

An Order that has a reminder sent will change its status to: REMINDER SENT.

An Order which is to be cancelled will change its status to: TO BE CANCELLED, etc.

E-MAIL TEXT

IEmail Text
You can set up the default text to be used in the e-mails that SoftSuitCase sends to your customers.

Select Administration, Maintenance and then Email Text.

The following screen appears:

There are 4 permanent Email Texts in each language:

Default E-Ticket
Default Offer
Default Customer
Offer Reminder

The text can be edited by selecting Email Text Title, and then Editing the text.

You can insert variables in the text, by clicking the buttons to the right of the text where the variables buttons are located.

You can also include with e-mail certain documents.

Customer Text is used as a cover sheet, when text and attachments are printed to be sent to the customer..

You can create all the texts you need, press NEW, and fill in the relevant fields.

You can use default text or HTML format.

A good idea is, for example to create an E-mail message text to advise of a flight departure time change.

In some countries, it is also possible to send an SMS. Contact TravelOffice for more information if you are interested in this feature.

It is possible to attach a PDF file as a permanent attachment per saved Email text.

Setup Print Forms.

SoftSuitCase contains several languages. This section is about the printed language, the language that is used when something is printed to the customer or converted into a pdf to send by e-mail to the customer. Different Customers may have different languages, but t each travel agent is responsible for the Setup and maintenance of the languages employed.

You can add more languages by contacting TravelOffice Help Desk.

To use, go to Administration > Maintenance > Default Reports > Setup Print Forms.

On the first tab you can see the languages that are installed. To install other languages, contact TravelOffice Help Desk.

On the subsequent tabs, all fields must be completed in all desired languages. It is possible to select a language (e.g. Swedish), and then get the SoftSuitCase to propose translations to other languages.

It is also possible to get a proposal for texts, by pressing the button; Get Default Text.

To translate to the selected language, just check the Translate boxes.

The lower tabs: o-Customer and o-Book, are if the Travel Agent has a license for Web services and/or then Online Booking Systems.

Variables.
The variable buttons insert a variable in the text at the point where the cursor appears when the button is pressed, for example: {UIDName}.

Text appearing in square brackets [...], is NOT translated.

GENERAL
The General tab contains the general information used in invoices, travel itineraries, etc.

It is possible (only on the General tab) to have different information per section, if for example the departments have different address.

In section COLORS, one can select colors of the boxes and lines and the text labels.

In the General tab, for the VAT settings, you can specify whether you want the private customers to see the VAT.

Upload logo:
Main logo (770x230) for use by all prints.
Logo of the left (60x120) for use by all prints.
Logo of the right (60x120) for use by all prints.

When all the pages are set up, it's a good idea to print the different forms out, and see if it looks as desired.

Set Reports to Local
If you have installed SoftSuitCase on a laptop, it may be a good idea to select this function.

To use, go to Administration > Maintenance

After the reports are set to local, they are copied to the local hard disk.

Copy reports
To use, go to Administration > Maintenance > Standard Reports > Get new version.

Select all and press Update reports.

# Daily usage
of
SoftSuitCase LITE

LOGIN.

After an employee or user has been created, they may login to SoftSuitCase.

Enter the Username and Password.

Select the database
Usually Travel Agencies will only have one database but larger systems can have more than one.

Select Language
Select the language to be used as the display language in SoftSuitCase.
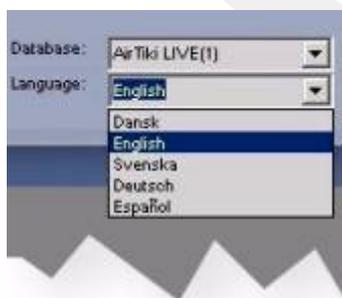
We currently support the following languages:
Danish
Swedish
English
German
Spanish.

Automatic Login
If we want to SoftSuitCase in the future to log you in automatically, just check the Save User name/Password box.

Main Screen Features

1. The Menu.
See the description for each menu item elsewhere in this guide.

2. View menu.
Using this menu, you can choose to see the main menu, calendar, etc., depending on how your screen resolution is set up.
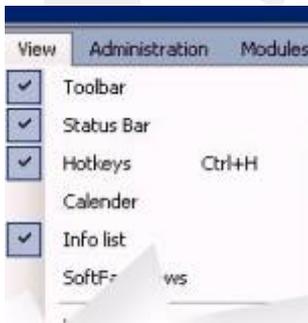
Tool Bar:
Displays the features in the top of the screen

Status Bar:
Displays the status bar at the bottom of the screen

Hotkeys:
Displays the Help menu with the most common features, on the right side of the screen

Calendar:
Displays the calendar at the bottom of the screen

Info list:
Displays information on sales etc. on the right side of the screen

3: Open a NEW Order

4: Select a printer.

5: Select the currency

6: Select primary PRINT language

7: The user who is logged in, as well as the user privilege number in parentheses.

8: Thename of the database in use

9: Help

10: Change Login

11: Close SoftSuitCase

Orders and Customers

When you have logged in you get the following screen.
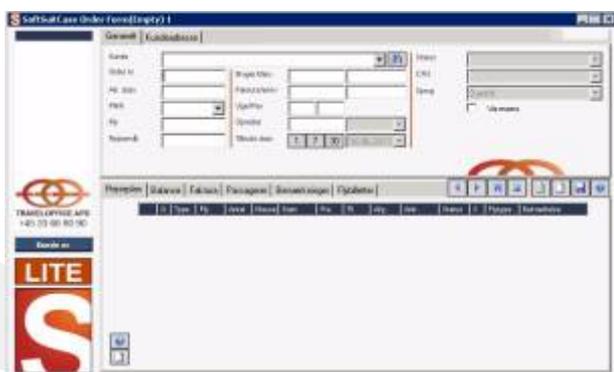
Orders

SoftSuitCase revolves an Order. An order can, among other things. contain:

A customer
One or more manual PNRs and/or one or more of the PNRs from Amadeus, Sabre or Worldspan
Passengers
Segments
Airline Tickets
Invoices
Payments
Vouchers

How to create an order from a PNR?

1. Transfer PNR from Amadeus, Sabre or Worldspan

2. Go to Functions and then to Transfer from CRS (Or press F3)

Then you will see the following screen:

Press CREATE NEW next to the PNR you wish to use to create a NEW Order.

PNR is opened in a NEW order.

Alternatively you can press F4 to create a manual PNR

3. Create or select a customer.

Enter customer name, and press Enter. If you previously had a customer with this name, a list will be displayed will all the existing customers with that name:
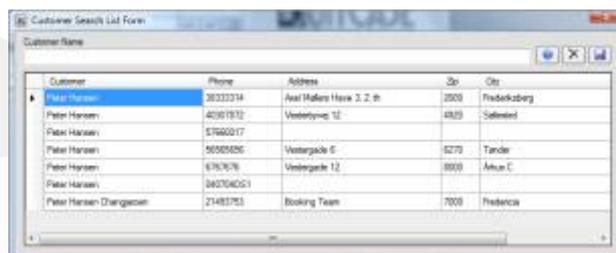
If you wish to use an existing customer, double click the gray box to the left of the customer's name, or press Enter when you have selected the customer.

Create new customer:
If you want to create a new customer, just fill in the fields with the customer's name, address, phone numbers, etc.
Remember the e-mail address. It is possible to enter several e-mail addresses separated by; or a new line.

4. Check airline and destination

You must manually check that the airline and destination are correct. If not, they must be corrected. They must be corrected.

5. Select Offer Date

Offer Date is the date on which the customer requested the reservation without having paid or approved it.

6. Attention, Customer references and language

If your customer wants another name as the contact then select the Attention Name.

If the customer wishes to have their invoices in another language other than the local language, then select the appropriate language.

7. SAVE the Order

Press Functions and Save Order (or F2)
The order is saved and assigned a unique Order Number

Orders and Customers

How to create a Manual Order?

1. Select Functions and then New Order.

2. Fill in the departure Date, Airline and Destination. Leave the PNR box empty.

3. Create or select a customer.

Enter customer name, and press Enter. If you previously had a customer with this name, a list will be displayed will all the existing customers with that name:
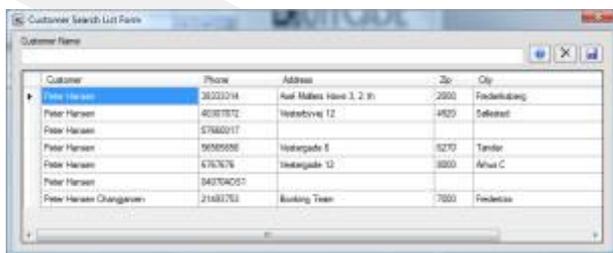
If you wish to use an existing customer, double click the gray box to the left of the customer's name, or press Enter when you have selected the customer.

Create new customer:
If you want to create a new customer, just fill in the fields with the customer's name, address, phone numbers, etc.
Remember the e-mail address. It is possible to enter several e-mail addresses separated by; or a new line.

4. Select the Offer Date

Offer Date is the date on which the customer requested the reservation without having paid or approved it.

5. Save order

Select Functions and Save Order (or F2)
The order is saved and assigned a unique Order Number.

6. Create the Passengers, Segments

NOTE:
The order must be saved before the passengers and segments can be created.

Segments

Segments on an order can consist of one or more of the following elements (Type is in parentheses):

A flight from a PNR or a manually created flight (AIR)
Hotel or Car from PNR or a manually created Hotel or Car (HTL/CAR)
Other (OTH)

How do you change an existing segment?

1. Select the Itinerary tab of an order, where all the segments are listed.

2. Double click in the gray box to the left of the segment you want to change.

3. The following screen appears

4. Enter the required information and press SAVE

How to delete an existing segment?

1. Select the Itinerary tab of an order, where all segments are listed.

2. Click in the gray box to the left of the segment you want to change.

3. Press DELETE

How to create a new segment?

All manually created segments is identified as M for manual

1. Select the Itinerary tab of an order, where all segments are listed.

2. Press the NEW icon on the left side (White Paper)

3. The following screen is displayed
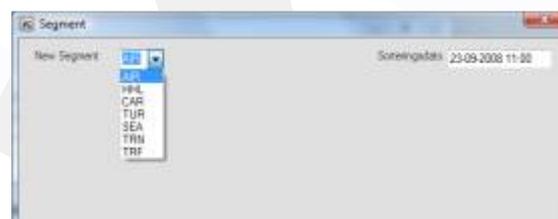
4. Select a type of the segment you want to create, and then press Enter.

5. Fill in the required information and press SAVE.

What do you do if the segments are sorted incorrectly in the Itinerary?

Each segment has a sorting date by which segments are sorted in the Itinerary.

Flight segments are sorted by departure date and time. Other segments are sorted by various criteria.

1. Open the segment that is sorted incorrectly.

2. Enter the correct sorting date and time (black date)

3. Press SAVE

PASSENGERS

How do you fix a passenger's name?

Go to the reservation system, and enter the correct passenger name in the PNR. Then transfer the PNR to SoftSuitCase again.

If there is other information that must be corrected, press the Passenger tab of the Order.

1. Double click in the gray box next to passenger's name.

2. The following dialog box appears:

3. Enter the required information and press SAVE.

Remember that a passenger is not the same as a customer!

How to create a new Passenger.

1. Press NEW in the Passenger tab.

2. Fill in the required information

3. Press SAVE

Dates of Birth and FF Cards are usually downloaded automatically with the PNR.

Contact details are only for your own use, and have no further function in SoftSuitCase.

INVOICEING

How to create an invoice or offer?

1. Select Menu File > Open Invoice (or Ctrl + I)

The following screen is shown:

2. Create Invoice Lines

Place the cursor in the Product box. If you know the Product Code, you just enter it. If you do not know the Product Code, you can type * in the field. Then press Enter.

If you do not know the Product Code or enter a Product Code that does not exist, the following screen will appear:
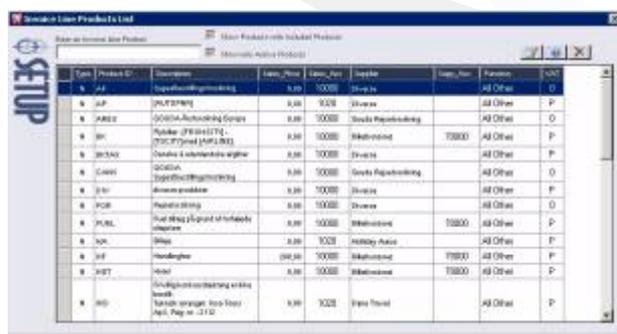
Double-click the mouse on the gray box to the left of the Product you wish to use, or when selected just press enter.

Fill in the required fields and press enter or tab to jump to the next field.

Description of each field in the invoice line:

L: Line type
N: Normal
H: hidden line

Product:
See above

Description:
Text about the reason for the invoice line. Can be changed

Document:
Any document number (Ticket, insurance, voucher.)

Units:
Number of units

Net Price:
Net Price of the invoice line. It will not be displayed to the customer. Negative sign (-) is in front of the amount

Sales Price (Unit Price):
Sales price which will appear on the customer's invoice.

(V):
VAT (Sales Tax)
See codes in the Setup section.
0 = no sales tax.
1-5: individual tax rates
P: EU Marginal Tax

When all the Invoice Lines are filled in, press the SAVE icon, and the Invoice Line will be added to the Invoice or it will replace an Invoice Line if it was edited.

You can create as many invoice lines, as desired.

If the sort order is wrong, this can be corrected by selecting the Invoice Line (click once in the gray box to the left), and then use the arrow buttons in the left bottom to move the Invoice Lines.

If something needs to be changed it can also be changed in the table itself.

The invoice can be extended to the screen's height by typing Ctrl + Z

INVOICEING

3. Issue Date and Due Date.

The Issue Date is usually the current date and the Due Date is usually the Offer Date from the Order. Both dates can be changed manually.

Customize dates, if necessary.

4. Deposits.

If the product requires a Deposit then it can be generated automatically when the Product is used.

It is also always possible to add one or more deposits manually. Each invoice has the option of up to 3 deposits with different due dates.

5. Issue the invoice

Press the Printer icon to issue an invoice (or F12).

An invoice will be a Credit Note if the total amount is less than 0

Change Customer's Name on an Invoice

It is possible to manually change the customer's name and address on each invoice. If a customer, for example, wants the Invoice billed to the company or vice-versa.

This is done under Menu Edit › Change Address in Invoice.

Delete Invoice Lines

You can delete Invoice Lines by double-clicking the gray box to the left of each Invoice Line and the pressing the Delete Key on your keyboard.

You can delete all the Invoice Lines by going to Menu Edit › Delete all Invoice Lines.

Copy of Invoices

It is possible to copy all the invoice lines of an invoice to a new Invoice or Credit Note. This is done going to Menu Edit › Convert or Copy old invoice.

You can copy from this order's invoices, but also from other order invoices.

Open and Closed Invoices

Each Travel Agency determines in the Setup when it wants an invoice to be closed. You can choose between:

When Issued
At midnight
When paid or received a deposit
Manually Closed.

As long as an invoice is open, you may edit it. If it is closed, you must issue a Credit Note to cancel it out and then create a new Invoice.

PAYMENTS

After an Order has been created, and one or more Invoices have been issued, what happens when the Customer chooses to pay!

How to record a payment in SoftSuitCase?

1. Open the Order, which has the Invoice or invoices the Customer wishes to pay.

2. Select Menu File > Payment (or Ctrl + P)

The following screen appears:

3. Select method of payment (Cash, Bank, etc.)

4. Choose Payment Type
Pay all invoices, if you are going to pay all outstanding invoices, otherwise select Pay some Invoices, and select the invoice or invoices you wish to pay. Both these Payments Types involve paying the total outstanding balance.

If the amount of the payment is not the same as the outstanding balance of the invoices selected then you must either select Invoice Deposit, Credit or Debit Payment or Customer Deposit.

5. Select Currency
The payment amount must be in the same currency as the invoice. If the customer chooses to pay in another currency, the invoice must be crossed with a Credit Note, and a new Invoice must be issued in the correct currency.

6. Select the Payment Date
Normally the current date, but the payment date may be changed if the user has rights to the

7. Press SAVE

Explanation of the elements in the Payment Form.

Pay All Invoices
Pay all the customer's invoices.

Pay some invoices
Pay some of the customer's invoices. Select the individual invoices.

Invoice Deposit
Pay a deposit for an invoice.

Customer Deposit
Pay a customer deposit (Advance payment).

Invoice Credit or Debits
Credit or Debit an Invoice.

Cross Deposits
Cancel out deposits. The resulting balance must be 0.

Cross Invoices
Cancel out invoices with Credit or Debit Notes. The resulting balance must be 0.

Use Payment ID
Used currently only for Travel Agents that have SoftFares.

Payment Date
The date on which payment was made.

Payment Account
The account to which payment is made.

Amount Received
The amount or paid. For the payment, the amount must be negative.

Currency
The currency of the payment which must be the same as the invoice currency.

Customer Outstanding Invoices
View all CUSTOMER'S outstanding invoices, etc.

Order for outstanding invoices
View all ORDER'S outstanding invoices, etc.

All Order invoices
View all the Order's invoices whether they are outstanding or not.

Payments Receipts
Press to print a receipt.

Close after payment
Close the payment form after the payment is complete.

PAYMENTS

How you pay back a customer in SoftSuitCase?

1. Create a Credit Note for the amount you wish to pay back. This is done creating an invoice, except that there is a minus (-) in front of the amounts.

2. Press File and then Payment (or Ctrl + P)

3. Select method of payment (Cash, Bank, Olympic Games.)

4. Choose payment type
Pay all Invoices, if there is only one invoice, otherwise select Pay some Invoices, and select the invoice you wish to credit.

5. Press SAVE

How do you register an invoice payment deposit in SoftSuitCase?

1. Open the order, which has the invoice you wish to pay.

2. Press Menu File and then Payment (or Ctrl + P)

3. Select method of payment (Cash, Bank, Olympic Games.)

4. Check Invoice Deposit.

5. Select the invoice.

6. Enter the amount of the Invoice Deposit in the Payment Received.

7. Press SAVE

How to make a Customer Deposit payment in SoftSuitCase?

1. Open an Order of the Customer that has made the Customer Deposit.

2. Press Menu File and then Payment (or Ctrl + P)

3. Select method of payment (Cash, Bank, Olympic Games.)

4. Check Customer Deposit

5. Enter the amount of the Customer Deposit in the Payment Amount Received.

6. Press SAVE

Customer Deposits will be entered in the Payments Table as 'D'.

Invoice with a total of 0,00. (Cancelled invoices)

To remove invoices with a total of 0,00 from the customer's account statements, these must also be paid. This is done by paying them with a 0,00 amount.

Customers

A new Customer is created easiest with an order. See the section on creating Orders.

How do you create a customer, without creating an order at the same time?

1. On an empty Order, Select Menu File and the Open Customer (Or Ctrl + F1)

You will then see the following screen:

2. Press NEW (White Paper) icon button

3. Fill in the required information

Select a customer account
Enter the credit max (0 if no credit)
Please enter the VAT number, if it is a business customer
Enter the AirPlus or Diners Travel account if they are members.

Enter the Credit Days:
0 = no credit
5 = 5 days after invoicing
-45 = 45 days prior to departure

If you do not write anything in the customer number, the primary phone number will be used or press the 'A' button if you want SoftSuitCase to auto generate a customer number.

4. Press SAVE

How do you find a customer?

1. On an empty Order, Select Menu File and the Open Customer Form (Or Ctrl + F1)

2. Press SEARCH (Binoculars) icon button

3. Enter the first part of the customer name

4. Press ENTER

5. Select a customer from the list

6. Enter the required information

7. Press SAVE

E-MAILS AND PRINTING

SoftSuitCase is fully integrated with E-mail, so it is possible to send all documents to the Travel Agent's customers by e-mail.

When an order and invoice is created, it is sent to the customer. This is done from the Menu > Functions > Email/Print, or, by pressing F12.

Then you will see the following window:
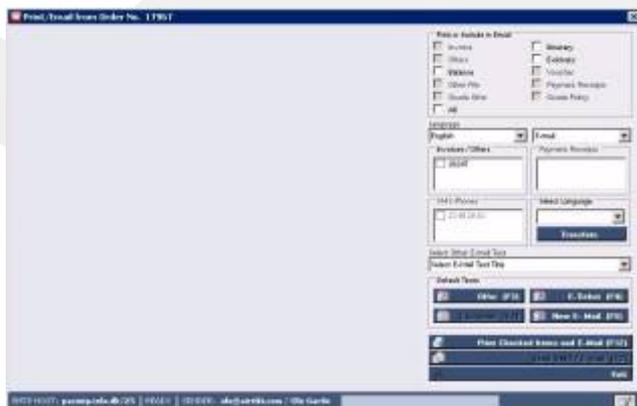
From this window, Invoices, Offers, e-tickets etc. can be forwarded to the customer.

In the example below, we will send an Offer e-mail to a new customer by pressing F3 (Offer):
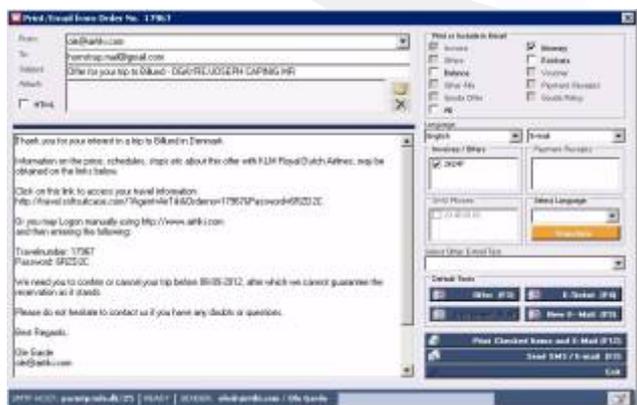
The text that appears is the Default Offer text that was created in the Email Text Form for this purpose. The text can be edited if so required.

As you can see, there is a Travel Itinerary and Invoice 26247 attached. These documents are attached to the e-mail as PDF files.

The text uses the Offer Date, and explains to the customer that this is an offer which must be paid at the latest on the 08 SEP, in order to be confirmed.

It can have additional files attached.

The system uses the PRINT LANGUAGE, both in text and in PDF files. In this case English is used.

In some countries, it is also possible to send a brief TEXT MESSAGE from the system.

Explanation for each field:

From: the sending e-mail address. Setup for the user or employee.
To: The recipient e-mail address

Subject: Auto text from Email Text setup. This can be changed

Attach: The attached files.

HTML: Do HTML encoding in e-Email. This requires a thorough knowledge of HTML.

SMTP HOST & Port: SMTP Host and Port No. for sending E-mail.
See the section on SMTP

Language: The selected language. Coming from the Order, but can be changed here if so required.

Invoice/Offers: Attachment of Offers and Invoices. Normally already specified in the Email Text but can be changed manually.

Payment Receipts: Payment Receipts

SMS Phone: The phone number to send the SMS to.

Translate: Any text in the text field can be translated to another language with BING Translator.

Select Other Email Text
Other (than quotes and airline tickets) individual E-mail message text that is created by the Travel Agent. It may be explanations about time changes, reminders, etc..

Print or Email
F2 sends the e-mail to the customer. F12 gives you the option to select a printer, and then to print the required documents along with a cover letter.

E-MAILS AND PRINTING

e-tickets

If your system is set up for it, all tickets are issued (Either by yourself or by another Travel Agency) on that PNR in Ticketab.

How to print e-tickets in SoftSuitCase?

There are several ways to print e-tickets in SoftSuitCase. The easiest is to press Menu Functions > Email/Print (or F12).

The following window then appears:
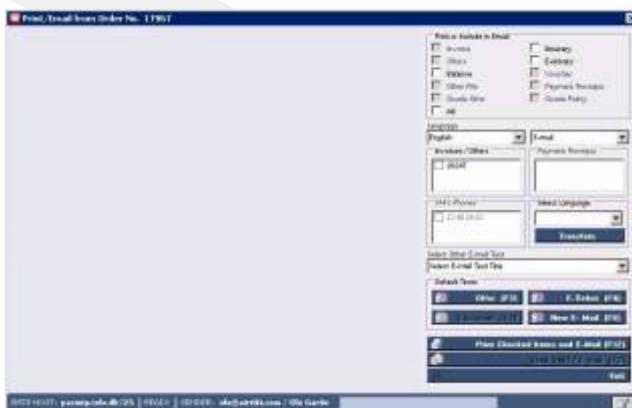
Select e-tickets (and possibly other documents) and press Print Checked Items or (F12).

They can also be printed directly from the Ticket tab.

How to send you e-tickets by email?

1. Press Functions > Email/Print (or F12).

2. Press the Default E-ticket text (F3)

3. Select any other documents you want to attach.

4. Edit the text if so required.

5. Enter or add email address

6. Press Send Email (or F2)

Search for Customers, Orders and PNRs

There are many different ways in which one can search for an Order, a Passenger or a Customer in SoftSuitCase. The most used is the Search window.

The Search window can be found under Functions > Search or the function key F9.

Searches can be combined as desired. In this case we are searching for a passenger with HANSEN as a surname and whose name could also include Hansen and who is travelling to DXB.

Once the results appear, move the cursor with mouse or arrow keys, to the desired customer, and then press ENTER to open the order.

Explanation of each field:

Include Orders without Passengers.
Select this if you want to search for Orders without passengers, like group Orders.

Include Filed Orders.
Also search Archived Order.

Last Search
Repeat last search

Passenger name
Passenger name e.g. from PNR. Searchable >*< or >%> as wildcards. For example, *GAR* will display all of the passengers where the GAR is part of the name, regardless of the location.

Customer name
Customer name. Searchable with >*< or >%> as wildcards. For example, *GAR* will display all of the passengers where the GAR is part of the name, regardless of the location.

Departure date
To search only on this date or later.

Destination
IATA 3-letter destination code

User
The user's login code that created the Order

Carrier
2 letter IATA airline code.

The following codes can both be used to filter the search, but will also appear next to each passenger:

A: Active (the trip is active)
T: Ticket Issued (issued air ticket)
V: Void (the trip is cancelled)
P: Paid (the trip is paid)

You can move between pages, if there are more results than can fit on a page.

Other ways to search for an Order.

1. In an empty order, enter the Order Number and press ENTER

2. in an empty Order, enter the PNR and press ENTER

Clean Up

In SoftSuitCase, all new Orders are Offers. If the Customer has Credit, when the Customer accepts the offer, the Order Status should be changed to ACTIVE TRAVEL. If the Customer does not have Credit, when the Customer has paid or made a deposit, then the Order Status should be changed to ACTIVE TRAVEL.

If an Offer Date has passed without the trip being accepted or paid, the Order Status should be changed to CANCELLED or DELETED.

This feature is called > Clean Up <, and can be found in Menu > Administration > Clean Up.

The following window appears:

The list will show all the Orders that have Offer Dates that have expired, because either they have not been accepted or paid on time, as well as the Orders where the Customer has cancelled.

See the section on › Order Status ‹ for information about the setup of this part of the SoftSuitCase.

If the Offer has expired, the Order Status will be OFFER. If you already have moved for the trip will be status OFFER ADVANCED. If the trip is cancelled, then the Order Status should be TO BE CANCELLED

At the bottom of the screen, there are some functional buttons, where there is a possibility to open all orders or send reminders to all expired trips.

You can also process the Orders individually.

To open an Order from the list
Press OPEN

To send a Reminder to a customer
Press REMINDER

To permanently Delete an Order
Press DELETE

If you press the DELETE, it will change the Order Status to cancelled, and the Invoice will be reset. If there is more than one invoice, or if there have been payments in the Order, these must be deleted manually.

If you use the WebService it will also usually also deleted the PNR

An order that moves will move the Offer Date 1-2 days from the day, and the status will be changed to OFFER ADVANCED

It is important to CLEAN UP. It is recommended to use this feature at least once a day.

Clean Up for Missing Payments.

Clean Up for Missing Payments, shows a list of Orders, that have not been paid on time.

Due Date
Press Due Date, to change the date of the last payment.

Balance
Press Balance, to print or export a Customer's balance.

Open
Press Open to open the Order.

ERRORS AND HELPDESK

What do you do when an error occurs?

There can be many reasons for an error. It may be a problem with your network or database, but it can also be a bug in SoftSuitCase.

If you get an error in SoftSuitCase you will be shown a window, where we appreciate if you give us a short explanation of what you were doing.

-What was I doing?
-What is the Order Number.?

The error will automatically be sent to the SoftSuitCase Help Desk and we might contact you for further information about the cause of the error.

If you cannot log on to SoftSuitCase, first of all check if you have the Internet access on that PC.

Why are there errors in SoftSuitCase?

There can be many reasons for an error in SoftSuitCase. One of the most common is that new users use the system in new ways, and perhaps do something that has never been done before.

We are constantly improving the system and therefore we are very interested in hearing from you, if you are experiencing errors and remember:

Even if your support period has expired, it costs nothing to contact us and get errors fixed.

Contact Help Desk

If you have a service agreement with TravelOffice, or if you are within the first 45 days of purchasing SoftSuitCase, we provide free support, it costs nothing to contact the Help Desk.

If you don't have support we will invoice you on a per call basis. Prices of calls can be checked on the TravelOffice's web site.

Remember it is always at least 25% cheaper to buy a Help Desk Coupon, which gives you access to 10 calls to Help Desk.

The price of coupons also appears in the price list.

Support Calls on a 24-hour watch costs twice as much as regular calls.

TravelOffice License Agreement

ENTIRE AGREEMENT

Licensee acknowledges that Licensee has read this agreement and understands this agreement (the "Agreement") is the final, complete and exclusive statement of the entire agreement between TravelOffice ApS("TravelOffice") and Licensee. This Agreement supersedes any prior and contemporaneous proposals, purchase orders, advertisements, and all other communications in relation to the subject matter of this agreement, whether oral or written. No terms or conditions, other than those contained in this Agreement, and no other understanding or agreement which in any way modifies these terms and conditions, shall be binding upon TravelOffice unless made by a written agreement, executed by duly authorized representatives of both TravelOffice and Licensee.

LICENSED SOFTWARE AND DOCUMENTATION LICENSE

1. TravelOffice hereby grants Licensee a non-exclusive, non-transferrable and perpetual license to use the enclosed computer software (the "Licensed Software") and the associated printed documentation (the "Documentation"), subject to the limitations set forth in this Agreement (the "License"). Licensee may use the Licensed Software only on one central processing unit with one input terminal. All right, title and interest to the Licensed Software and the Documentation are, and shall remain, in TravelOffice or TravelOffice's licensors, as the case may be. Licensee have no right of access to the source code of the Licensed Software. Licensee is not entitled to updates or upgrades of the Licensed Software or Documentation.

2. Licensee may not alter, assign, create derivative works, decompile, disassemble, distribute, lease, modify, reverse engineer, sublicense, transfer or translate in any way the Licensed Software or Documentation (except as specifically and expressly provided below for "redistributable files"); provided, however, that Licensee may permanently and simultaneously transfer all of the Licensed Software, Documentation and the License if: a) Licensee delivers to the transferee the Licensed Software and Documentation; b) notify TravelOffice in writing of such transfer; and c) destroy any archival/backup copy. Licensee agrees that the transferee must expressly accept all terms and conditions of this Agreement.

3. Licensee MAY NOT COPY the Licensed Software or Documentation (except as specifically and expressly provided below for "redistributable files"); provided, however, that Licensee may make one (1) copy of the Licensed Software for archival/backup purposes.

4. Licensee may create application software using the Licensed Software, including the trade secrets and confidential information of TravelOffice, and Licensee may incorporate in such application software, in executable form, those files identified in the Documentation as "redistributable files." Licensee MAY NOT distribute the Licensed Software, in any format, to other users for development purposes. In particular, if Licensee creates a control using the Licensed Software as a constituent control, Licensee MAY NOT distribute the control created with the Licensed Software (in any format) to users for development purposes.

5. If either the Licensed Software or Documentation is used in any way not expressly and specifically permitted by this License, then the License shall immediately terminate. Upon the termination of the License, Licensee shall thereafter make no further use of the Licensed Software or Documentation, and Licensee shall return to TravelOffice all licensed materials, postage prepaid.

WARRANTIES

1. LIMITED WARRANTY ON DISTRIBUTION MEDIA. For a period of thirty (30) days following the date of delivery of the Licensed Software and Documentation to Licensee as the original licensee, if evidenced by Licensee's receipt as such, (the "Warranty Period") TravelOffice warrants the DISTRIBUTION MEDIA (the "Media"), such as diskettes or CDs, on which the Licensed Software is embodied to be free from defects in materials and workmanship under normal use. The warranty is personal to Licensee, and no warranty is made to Licensee's transferees. Any implied warranties of merchantability or fitness for a particular purpose for the media are limited in duration to the Warranty Period, after which time all warranties, of whatever nature, are specifically disclaimed.

2. NO WARRANTY ON LICENSED SOFTWARE OR DOCUMENTATION. SUITCASE licenses the Licensed Software and Documentation solely on an "AS IS" basis without warranties of any kind, such as warranties of merchantability or fitness for any particular purpose. The entire risk of quality and performance is with Licensee. The Software and Documentation are not represented to be error-free. If either the Licensed Software, Documentation or both prove to be defective, Licensee assumes the entire cost of all servicing, correction or repair.

3. The foregoing warranty gives Licensee specific legal rights, and Licensee may also have other rights which vary from state to state. Some states do not allow the limitation or exclusion of implied warranties, so the above limitations may not apply to Licensee.

REMEDY FOR DEFECTIVE MEDIA

Licensee's sole and exclusive remedy in the event of a defect in a warranted item is expressly limited to replacement of the defective media. To receive a replacement, Licensee must send the defective media, with proof of purchase, to TravelOffice at the address indicated below, postage pre-paid and postmarked within the Warranty Period. In no event shall TravelOffice be liable for any other obligations or liabilities including, but not limited to, liability for damages (whether general or special, direct or indirect, consequential, incidental, exemplary), or for any claim for the loss of profits, business or information, or damage to good will even if TravelOffice has been advised of the possibility of such damages. In any event, TravelOffice's maximum liability shall be limited to the amount of the purchase price.
Some states do not allow the limitation or exclusion of incidental or consequential damages, so the above limitations may not apply to Licensee.

The Licensed Software and ocumentation have been developed exclusively at private expense, and are provided with RESTRICTED RIGHTS. Use, duplication or disclosure by the Government is subject to restrictions as set forth in subparagraph (c)(1)(ii) of the Rights in Technical Data and Computer

TravelOffice is the Contractor,
and is located at Nytorv 7, DK-1450 Copenhagen K, Denmark,
Phone: +45 33 66 90 90

MISCELLANEOUS

This Agreement shall be considered severable, and if for any reason any term or condition is determined to be invalid, illegal or unenforceable under current or future law, such invalidity shall not impair the operation of, or otherwise effect, the valid terms and conditions of this Agreement, so long as the intent of this Agreement is maintained.

This Agreement shall be governed by, construed and enforced in accordance with the laws of the Commonwealth of Pennsylvania, with the exception of its conflict of law provisions. The parties consent to the personal jurisdiction of the Commonwealth of Pennsylvania and agree that any legal proceedings arising out of this Agreement shall be conducted solely in such Commonwealth.

No action, regardless of form, arising out of this Agreement may be brought by either party more than one (1) year after a claim has accrued.
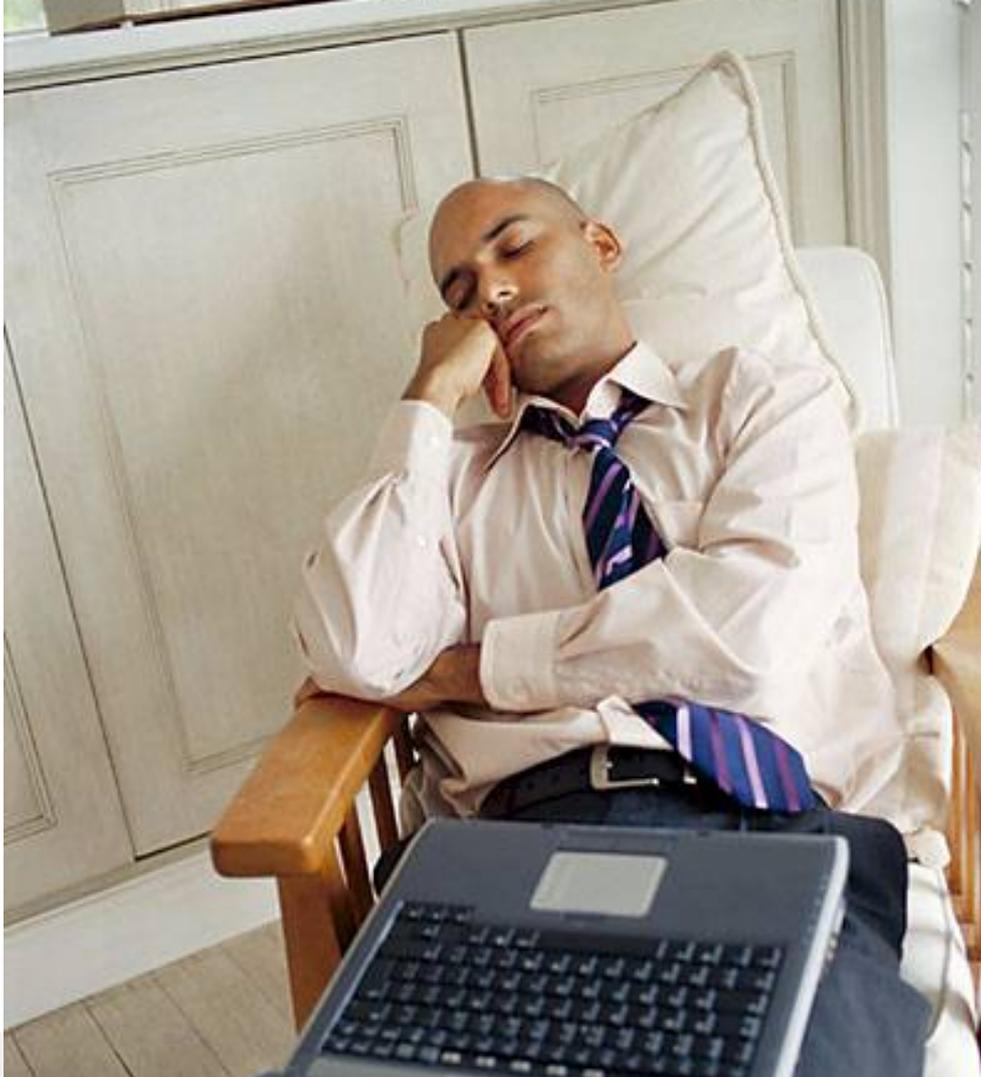
> Never let a
> computer know
> you're in a hurry.
> *- Anonymous*

Operation systems	Microsoft Windows NT©	
	Microsoft Windows2008©	
	Microsoft Windows 7©	
	Microsoft Vista©	
GDS	Amadeus, Sabre	
	& Worldspan	
Minimum requiments Workstations	Microsoft Vista/7© 2 GB RAM	
	NT512 GB RAM	
	50 GB Harddisk	
Minimum requiments Server	Microsoft Windows2003©	
	Microsoft Windows 2008©	
	2 GB RAM	
	50 GB Harddisk	
	In installations less than 6 users	
	server can be Microsoft Vista©	
	or Microsoft Windows 7©	
FrontOffice	Microsoft IIS	
Online Booking	Microsoft IIS	
Platform	Microsoft.NET© 4.0	
Communication	Internet required	
	Min. 2 Mbit download	
Multi Locations	Yes, please contact Soft	
	SuitCase for information	
Max Users	No maximum	
Free support	45 days after installation	
Free test	Disabled	

Contact:

www.traveloffice.dk

Travel**Office**

Headoffice:
Nytorv 7 - B
1450 Copenhagen K
Denmark

Tel.: +45 33 66 90 90
Email: info@traveloffice.dk

Technical support:
+45 33 66 90 99