*adventure*e*ngine.com*
OPERATOR USER MANUAL 2008 TABLE OF CONTENTS

SECTION 1- REGISTRATION

1.1 Open Website

Open the site http://www.adventureengine.com/trip_search.php and register from the top toolbar <Join Now>.

Register here

Home   Business Solutions   Join Now   Login   Contact Us

search, compare and buy

1.2 Registration Type

Choose to register as a supplier / operator

Registration

I want to shop for trips.
Register here as a Customer.

I want to sell my own trips
Register here as a Supplier or Operator.

Register here as a
Supplier or Operator

I want to advertise and/or sell the trips of operators.
Register here as a Reseller.

FAQ | User Agreements | Privacy Policy | About Us | Pricing | How it Works

1.3 Welcome Page

This page explains the steps required to register.

Supplier Introduction

Welcome Tour Suppliers and Operators!
Register in 3 easy steps:

1) Create login -
   i. Create username & password
   ii. Complete company profile

2) Create your account
   i. your banking information (so we know where to send your money)
   ii. your business license information
   iii. your insurance information
   iv. two supplier references

Items ii - iv are required in order to verify existence of all applicants, and to ensure that Adventure Engine features first rate, top quality businesses on our database. This information will not be sold or used for any other purposes. Applications not accepted will receive a full refund.

3) Load tours or attractions with our wizard.
   Our wizard will help you load seats, photos, and trip descriptions. Once trips are loaded, customers can search, compare and buy. Remember, you set commissions that you are willing to pay others to sell your trips for you.

It's that easy to "get on it" now!

Click 'next' to continue.

Visit our operator / supplier FAQs or contact us for a demo or more information.

Next

> **Click <Next>**

FAQ | User Agreements | Privacy Policy | About Us | Pricing | How it Works

1.4 Log In Info Page

Now you're at the login info page where you are asked to choose a user name, password, security question and answer.

> **Choose a user name you will remember**

Create Login Info

Username

Password (8-14 characters)

re enter Password

Security Question Select your question...

Answer

☐ I have read and agree to terms and conditions

System may not function on Firefox, Netscape or Safari browsers. Javascript must be enabled.

Go Back   **Next**

> **Choose a password**

> **This security question and answer will allow you to retrieve a forgotten password at a later time**

> **Read the terms and conditions carefully before checking the box**

FAQ | User Agreements | Privacy Policy | About Us | Pricing | How it Works

1.5 Company Information Page

Now you're at the company information page where you are asked to enter your company contact information, company profile and set commission rates.

Company Information

Registration – Company Information
* indicates required information You can come back to change your information at any time.

Field	
Company Name*	
Contact Person Name*	
Mailing Address*	
Street Address (If different from above)	
City/Town*	
Prov/State*	
Country*	
Zip/Postal Code*	
Phone Number*	
Toll Free	
E-mail*	
Website	
GIS	
Years in Business*	
Company Profile *	
Open to Resellers	☐ Yes
Percentage Offered	___ %
Hiring	☐ Yes
Preferred Currency	US Dollars

Go Back   Next

This is your company contact information that the consumer will see

Enter your website in http://www. format

GIS coordinates will help consumers find your location with map features in future versions (not required)

Enter your company profile including awards, accreditations, etc. This is your time to shine!

What % commission are you willing to pay resellers to sell your product?

Select your preferred currency

1.6 Registration Confirmation Page

Congratulations, your registration is complete!

Account Activation Notice:

Your registration has been received.
Please click here to access a <u>business information form</u> for you to complete.
We will activate your account within 2 business days of receiving your information form and will notify you by email.

Thank you for registering with Adventure Engine - we look forward to promoting your business to the world.

Note: *Your account has not yet been activated. An Adventure Engine client care team member will contact you within 48 hours with the final steps of completing your registration. This may include your insurance policy number, banking details (so we can transfer you funds) and more information regarding your product.*

SECTION 2 - LOG IN

2.1 Open Website

Open the site http://www.adventureengine.com and log in from the top toolbar.

More than 30 years of Adventure and Technology experience
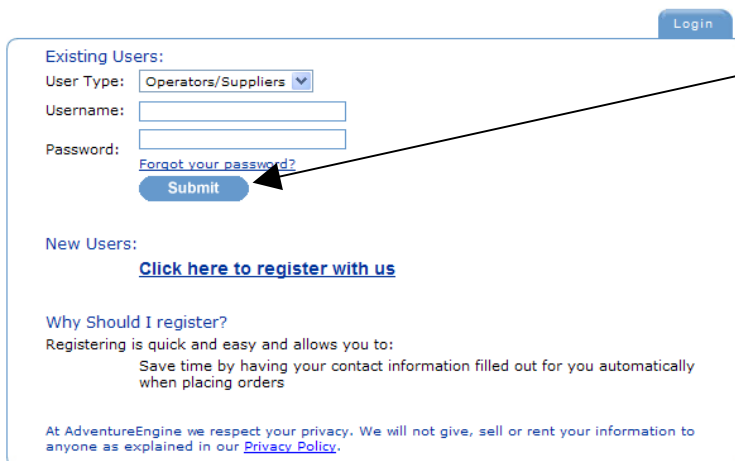
adventureengine.com

Online Reservation & Distribution Systems for Adventure Travel

| HOME | CONTACT US | WHY CHOOSE US | 1-800-993-6648 | LOGIN |

Login here

2.2 Login Page

Login

Existing Users:

User Type: Operators/Suppliers ▾

Username:

Password:

Forgot your password?

Submit

New Users:

Click here to register with us

Why Should I register?

Registering is quick and easy and allows you to:

Save time by having your contact information filled out for you automatically when placing orders

At AdventureEngine we respect your privacy. We will not give, sell or rent your information to anyone as explained in our <u>Privacy Policy</u>.

Choose to log in as Operators / Suppliers, enter your username and password, then click <Submit>.

Note: *The Username and Password fields are case sensitive when logging in.*

SECTION 3 - ADD A TRIP

> **Note:** *You will automatically be directed past the 'trip summary' page to the 'create a trip' page the first time you login.*

3.1 Getting Started

You will need to prepare the following information in order to create your trip.

1. Trip name
2. Description
3. Start and end times
4. Duration of trips and all dates (i.e. every Wednesday from May 25 – September 14)
5. Detailed trip itinerary
6. Pricing and pricing categories (i.e. student prices, senior prices, etc.)
7. Number of seats available (if some seats have already been booked, please let us know)

If this information is available on your website or in your brochures, then simply direct us to where the information can be found. Remember, you can make additions and edits to your trips at any time.

3.2 Trip Summary Page

When you login you will automatically be directed to the 'trip summary' page, with the exception of the first time. Add a trip from the top menu bar.

Trip Summary

Add a new trip here

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

> **Note:** *Please complete your trip entry from start to finish to avoid losing information. In order to ensure complete and quality entries for our end users, the system will not save incomplete trips.*

3.3 Create a Trip Page (step 1 of 6)

You are now on the 'Create A Trip' page. Remember, you can come back at any time to change or add information and photos.

Trip Name*

Trip Description*

Enter a brief trip description here.

Difficulty Rating*
Select One...
Beginner
Intermediate
Intermediate/Advanced

Note the difficultly level here. Select up to three levels by holding down the ctrl key.

Keywords*

Like Google, enter keywords that people would use to find your trip in a search. Type as many as you can think of and put a comma after each word.

Main Activity* Select your activity from here...

Secondary Activities
(choose any five activities by holding down the control key)
Select any five...
4WD
Accommodation
Adventure Touring
Airplane Tours
Archeology
Artistic Adventures
ATV/Jeep/Dirtbikes
Backcountry Tours - mechanised
Backcountry Tours - non mechanised

Choose the main activity and three secondary activities (by holding the ctrl key) that are associated with the trip.

Country* Select Country...
Region* Select Region...
City Select City... OR Contact Adventure Engine to have you city added.

Choose the country, region and city from where your trip departs

Speciality Select Speciality...

If your trip is aimed at a particular demographic or special interest group, choose it here.

Base Rate (CDN)* $

Collect GST?

Enter the base cost of the trip here.

Tax 2 %
Tax 3 %
Flat Fee Per Person CDN

Enter taxes and any flat fee as they apply in your region.

Cut Off Day(s)
Duration/Min. Stay * Day(s)
GIS Coordinates

Enter the 'cut off', or how many days before the trip you stop online sales.

If deposit paid, how many days before trip date is balance due? 0

Enter the duration of one trip. Use only numeric values.

Do you want to hide this trip from appearing in your shopping portals and the AE search engine?

Upload Photo
*Should be JPEG (.jpg) or GIF (.gif) format.
No larger than 320 pixels wide x 240 pixels height.
Photos should maintain the 4:3 ratio.
Photo names may only contain a-z, A-Z and 0-9 (not '\/!@#$% ^&"or spaces).*

Browse...

Enter the number of days prior to the trip that the balance is due.

Cancel   Next   Fast Add

Use the 'Browse' button to load photos as per specifications in red.

Recommended for new users, once you have completed all the fields, click <Next>

If you are comfortable with the trip loading process, choose **fast add**. This allows you to save one page at a time.

3.4 Add Prices (step 2 of 6)

You are now on the 'Add Prices' page where you are asked to define your price categories. You can also add group discounts, extras and return trip pricing on this page.

Edit Price

You can customize the name of your base price.

Edit Prices - Base Pricin
(Will only affects occurr

Here you can see your base price as it was entered in the 'Edit Trip' page.

Age Discount

Description	Discount($)
adult	$0 ❓
(Base Rate - no age charges)	Change Base Price: $ 150
kids 12 under	25

Enter a description of your pricing levels and the dollar amount of the discount. This is the dollar amount that will be taken off of the base price. *In this example, at checkout, the adult rate will show as $150 and the kids rate will show as $125 ($25 off the adult rate).*

Group Discount

Description	Amount	Group Size
Dollar Discount Per Seat ▼	50	3
▼		
▼		
❓

You can create group discounts by selecting the type of discount from the menu (discount per seat or discount per group), the dollar amount of the discount, and the minimum size of the group to be eligible for the discount.

Extra Charges

Select an Extra to edit or add: * Add New Extra * ▼

Enter the details of the new extra in the fields below and then click <save this extra>.

Sort order of Extra		(99=top 0=bottom)
Description of Extra		
Additional info about Extra		
Cost($)	$	
Units Available		(leave blank for 'unlimited')
Collect GST? ❓ ☐		
Tax 2: ❓		%
Tax 3: ❓		%

Save This Extra

You can also create optional extras by selecting <Add New Extra> from the menu. Here you can choose to list the extras in a particular order, describe the extra, give additional information and define how many of this extra are available.

Return Trip

Select a trip to use for the return trip option: Return test trip ▼

Enter the discount offered: $ 100

Cancel   Save

If this trip has an optional 'Return Trip', choose the return portion of the trip from the menu. You can then enter a dollar discount applied if the customer purchases both trips together.

Note: *If your account has the inventory module enabled, the return trip option will not appear.*

3.5 Add Itinerary (step 3 of 6)

You are now on the 'Add Itinerary' page where you can add an outline of the itinerary for each day of this trip. You can also add gear required and additional photos here.

Itinerary

Trip Itinerary - feb11can

Day 1

Description / Title

[Style] [Font] [Size]

B *I* <u>U</u> | ☰ ☰ ☰ ☰ | — | ¦☰ ☰ | ☰ ☰ **A** ◇ | 🌐 🖻

Itinerary ❓

☐ View Source

Gear required

Image1 ☐ Change Image 1? [   ] Browse...
Image2 ☐ Change Image 2? [   ] Browse...
Image3 ☐ Change Image 3? [   ] Browse...

Cancel   Next Day   Save

> Outline the detailed activities of each day. You can cut and paste from your current brochures / website.

> 1. Enter up to 250 characters or…
> 2. Include a web link to your gear list or…
> 3. Copy and paste larger lists into the itinerary space.

> You can load up to 3 photos per itinerary day.

> If you have more days on your trip, click <Next Day> to proceed to the next itinerary page. If you are done, click <Save>.

Note: *Utilize your itinerary space to communicate anything you deem important for your customer to know. For example: custom packages available; minimum purchase requirements; price list; etc.*

3.6 Add Dates (step 4 of 6)

You are now on the 'Add Dates' page where you are asked to enter the dates this trip is available. Here you have the opportunity to enter this trip for one day only; to recur it regularly over a period of time; or enter multiple random dates.

Add Dates

Add Dates Step 4 of 6
How often does your trip occur?
For multi-day trips, the date entered is the date of the first day of the trip.

○ *Once* Date [　　　　　　] 📅

If your trip only occurs once, select the date from this calendar.

Recur for [　] week(s) starting [　　　　　] 📅 on:

○ *Weekly* ❓
☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☐ Friday ☐ Saturday

If your trip occurs on a regular schedule throughout the season, click the days of the week, length of the season according to weeks and the start date of the first trip here.

Create trip dates by entering the date and clicking the add button.

[　　　　　] 📅

○ *Random* [　　　　　　　]
❓

If your trip occurs randomly throughout the season, add dates one at a time here by choosing the date and clicking <Add>.

(Add)　(Remove)

☐ Select if your customer is allowed to book multiple days.

If this trip is a hotel room night, click this box.

(Next)

TIP*:*   *If your trip occurs daily, choose weekly then click on each day of the week.*
        If your trip runs every other week, choose weekly then delete every other trip from your trip summary page.

NOTE: *If you select that this trip is a hotel room night, the customer will be asked to choose an arrival and departure date when purchasing (rather than just a departure date). This option can only be used for one-day trips, not multi-day tours.*
        This option cannot be used for trips with variable pricing for seasons as the price difference will not calculate.

3.7 Add Times (step 5 of 6)

You are on the 'Add Times' page where you are asked to enter the start and end times of your trip.

Add Times– Step 5...

Enter start and end times for your trip.

Start Time   End Time

[ ] : [ ] AM ▼   [ ] : [ ] AM ▼   **Add**

Trip Times

[   ]   **Remove**

Save

If Start & End Times are not applicable, Press Skip

Skip

> Enter the start and end times of this trip, then click <Add>. If this trip departs multiple times a day, enter each departure time now.

> Once you have entered all the start and end times, click <Save>. If times are not applicable to this trip, click <Skip>.

3.8 Add Seats (step 6 of 6)

You are now on the 'Add Seats' page where you are asked to enter the number of seats available for this trip. If you have already sold seats on some trips dates, please enter the total number of seats here, and go back to adjust those particular dates later (see page 22).

Add Seats

Add Seats - Step 6 of 6
Define number of seats.

* indicates required information.

Minimum Number of Seats* [0   ]
Maximum Number of Seats* [0   ]
Base Price $1500
Save

> Enter the minimum number of participants required for this trip to depart, and the maximum number of participants allowed.

3.9 Confirm Trip Details

Now you are on the 'Confirm Trip Details' page where you can read through the trip information you have entered to ensure it is correct.

Confirm Trip Details

Trip Information:

Trip Name: Adventure Engine Trip#1
Trip Description: Adventure Engine Trip #1 take you through historical Rossland
Difficulty Rating: Beginner, Intermediate, Intermediate/advanced
Keywords: rossland, kootenay, british columbia, historical, history, tour
Main Activity: Circle Tours
Secondary Activity: Charters & Guides,
City: Rossland
Region: British Columbia
Country: Canada
Specialty: Soft Adventure
GIS Coordinates:
Base Price: $45

Taxes:
- GST: 7

Flat Fee Name: Land use fee
Flat Fee: 7
Duration: 1 Day(s)
Image: adventureengine logo_729.GIF

Day 1

Description: Arrival Day
Itinerary: Today you arrive at the pick-up location at 8:00am. Lunch is served at 12:30pm drop off is at 5:00pm.
Gear Required: Suntan lotion, appropriate clothing, camera
Image1:
Image2:
Image3:

Trip Start Dates and Times:

Weekly starting 2005-7-30 for 12 week(s).
On
Monday
Wednesday
Friday

Start Time(s):

- 8:00 am
- 12:00 pm

Previous   Finish

> Check all the info here and click <Finish>. If you have found errors, click finish anyway and go back through your trip summary page to edit.

3.10 Back to the Trip Summary Page

Now you are back at the 'Trip Summary Page' where you can view all the trips you have entered and make edits.

Trip Summary

Click here to see all your trip dates.

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

3.11 Expanded View – Trip Dates and Bookings 'At A Glance'

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action								

trip6364 Test trip apr 16

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact
Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip Information

☑ ✗ Trip Dates ... Seats Min Max ... Seats Booked ... * Seats Available ... Price (CDN) ... Hot Seat

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)		
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

SECTION 4 – MORE OPTIONS & FEATURES

FROM YOUR TRIP SUMMARY PAGE

4.1 Add a Client Form

Client forms allow you to customize questions you want your customers to answer when purchasing a particular trip. Your customer will see these questions at checkout.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Click here to add a client form

Custom Select and Input Questions

Type the question here.

Click here to make answering this question mandatory at check-out, to sort the order your questions appear and choose if you would like the customer to type an answer (text input) or pick from a list of options (single select).

If this is a single select question, type the answer list here, separated by the <Enter> key.

Select <Add New> from this menu to add a new question.

NOTE: *To view answers, choose <Client Questions> as a report option when creating operator reports (see page 16).*

When sorting their display order, questions will appear in descending order (i.e. 99-1)

4.2 Add Client Contact Info

Programming pertinent contact info allows you to gather information about all your clients; not just the one that paid.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip Information

☑ ✗ Trip Dates

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat	
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

[Update Price] [Change Date] [Change Seats] [Delete] [Change Times]

> Click <Add Contact Questions> to program key contact info you want to get from your customers.

Contact Information

Contact information required for: test trip

Please check the box beside any of the following contact info you would like customers and additional partipants to enter when purchasing this trip. This form will be presented to the customer when checking out.

First Name	☐
Last Name	☐
Address Line 1	☐
Address Line 2	☐
City	☐
State/Province	☐
Zip/ Postal Code	☐
Country	☐
Telephone	☐
Email	☐
Sex	☐
Age	☐
Allergies	☐

[Cancel] [Save]

> Click any or all of the boxes and your customer will be prompted at checkout to answer on behalf of all participants they are booking for.

4.3 Custom Reports

The report feature allows you to create customized accounting, trip or customer information to your liking. All reports include both online and offline sales.

Click <Operator Reports> from the trip summary area.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

Click the trips you wish to create a report for. You can choose multiple trips by holding the ctrl key.

Choose the criteria of your report, including the dates you wish to see according to the date of the trip, or the date the booking took place.

Choose the columns you wish to see in the report, or click <Select All> to see everything.

Trip ID:
ALL
trip6364-Test trip apr 16
trip6365-Return test trip
trip6366-Log Cabin Accommodation

Agent ID: All Agents
Order By: Order Transaction Date
From Order Date: X Clear Field
To Order Date: X Clear Field
From Seat Date: X Clear Field
To Seat Date: X Clear Field
Note: If you leave the 'to' date blank, the report will default to today's date

☐ (Select All)

General & Accounting Information

☐ Order Date
☐ Order Number
☐ Offline Sales Notes
☐ Sale
☐ Taxes
☐ Total Sale
☐ Amount Received

☐ Dist.Name
☐ Dist.Comm
☐ Agency
☐ Agent Name
☐ Agent Discount
☐ Net Rate (agent owing)
☐ Balance Owing
☐ Coupons Used

Customer Information

☐ Customer Name
☐ Email
☐ Address
☐ Phone 1
☐ Phone 2

Trip Information

☐ Trip Name
☐ Trip Date
☐ Trip Duration
☐ Seats Sold

☐ Age Discounts
☐ Customer Notes
☐ Extras

Participant Contact Information

☐ First Name
☐ Last Name
☐ Sex

Participant Questions

Note: Selecting Custom Questions as a report option is only recommended when choosing 1 trip. If you have different questions for each and you select multiple trips, the report may have a large number of columns.

☐ Do you have allergies?
☐ What is your favourite colour

Load
Delete
Save

Note: Using the name of an existing report will cause the old report to be overwritten.

Submit

Click <Submit> to process the report. You can also use the <Save> field to save the report template for later

The report will appear in a new window. You can then click the <Download (csv)> button to have the report appear in excel format.

Trip Report for: Kristi testing april 16	Trip Name: Test trip apr 16 Return test trip Log Cabin Accommodation	Trip ID: trip6364 trip6365 trip6366	Order Dates:16-Apr-2008 To 16-Apr-2008		
	Payment Type	Order Date	Order Number	Customer Name	
1	Full	16-Apr-2008 7:01pm	C1088	George Yung	
2	Full	16-Apr-2008 11:14pm	93070	Howard Johnson	
3	Full	16-Apr-2008 11:15pm	93071	Ace Babs	

Comm. means Commission

Print   Download (csv)

4.4 Program Minimum Deposit Required

You can design the system to accept a set minimum deposit, rather than full payment when customers book your trip online. The database will inform them at checkout to 'check supplier terms and conditions for balance payment'. It is your responsibility to remind your clients at this time to pay their balances.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip Information

☑ ✗ Trip Dates

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat	
☐ 12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐ 19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐ 26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐ 02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

Click <Edit Min Deposit>

Click here to select if you accept a % deposit amount, or flat dollar amount.

Trip Deposits

trip1122-test trip

Type
◉ Percentage
○ Dollar

Amount
[100]

Enter the deposit % or $ amount you require. Leave the field as 100%, or clear if you do not accept deposits.

Clearing this field or setting the field to 100% will mean that deposits are not accepted on this trip.
Setting this field to 0% will mean that no deposit is required. This is NOT recommended.

Setting a Dollar amount higher than the cost of the trip is not recommended.
If you are selecting Dollar amount, this will be the deposit required for EACH participant on the trip. Coupons and Hotseats will not affect this type of deposit required.

(Save)   (Cancel)

NOTE: *Do not type <0> as that will allow someone to book your trip without paying any deposit.*

4.5 Create Hot Seats

Hot seats allow you to sell off last minute empty seats at a percent discount, so every trip your trip leaves full. Customers can search the database by hot seats, or choose to receive a regular update on discounted trips. You create hot seats from the trip summary page.

Click <Add> in the hot seat column beside the trip date you wish to create hot seats for.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip Information

☑ ✕ Trip Dates

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat	
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

Enter hot seat information here.

Hot Seats

Add Hot Seats for One Recurrence

You can currently only add one hot seat entry per trip occurence. If you need to change the number of hotseats or discounts, please contact customer support.

Select Trip Recurrence	2006-02-26 9:00 am
New Trip Id	Htrip1093
How Many Hot Seats?	0 (Booked: 0)
Original Price	100
Discount Offered (%)	0
Hot Seat Price (CDN)	100

(Save)   (Cancel)

Enter how many hot seats you wish to create and the percent discount here.

> **NOTE:** *Hot Seats only apply when your customer is purchasing their trip online. If you are processing a sale 'offline', use the manual discount field.*

4.6 Create Coupons

You can create coupons for dollar or percent discounts. To get to the coupon page, place your cursor over the 'My Account' link and choose <My Coupons> from the menu.

Coupons

Add Coupon | Click coupon row to edit

Coupon Code	Discount Description	Expiry Date	Issued	Redeemed
1Q1F1V01	Testing coupon	2008-04-30	5	2

From the coupon summary page, click the <Add Coupon> link.

Coupons

Enter coupon information

Which trips can this coupon be applied against:

```
trip6364-Test trip apr 16
trip6365-Return test trip
trip6366-Log Cabin Accommodatio
```

Select All

Choose the trip the coupon applies to. You can select multiple trips by holding the ctrl key.

Coupon Type: - Select -

Coupon Amount (based on type):

Allow coupon to be used on Hot Seat Purchases:

Expiry Date:

Choose the coupon type, amount and other defining features.

Limit the number of coupons available:

Multiple uses allowed in same checkout:

Coupon Notes (internal use only):

Cancel   Save

NOTE: *To edit a coupon you previously made, click on the row of the coupon you wish to edit in the 'Coupon Summary' page.*

4.7 Upload Your Terms and Conditions

Trip Summary

Click here to load your terms and conditions covering deposit and cancellation policies, etc.

Add new trip | Edit Company Profile | Receipt Report | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action	
trip1093	canada2		Click to see trip occurences.

Terms and Conditions

Terms and Conditions for Company: feb19can

[Style] [Font] [Size]

B *I* U | ≡ ≡ ≡ ≡ | — | ⅒ ⅓ | ⅙ ⅙ **A** ⬥ | ⊕ ⬚

Type or copy your terms and conditions here.

☐ **View Source**

Waiver

[   ] [Browse...]

Click <Browse> to upload an existing waiver file from your computer. The waiver is a document that must be 'accepted' by shoppers to proceed through checkout. It can also be downloaded and printed by the shopper.

Cancel   Save

4.8 Find Order & Search by Customer

This feature can be used to look up a customer and efficiently handle queries. It can also be used to view, edit, transfer or cancel / refund order.

Trip Summary

Click <Find Order>.

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

Find Order

General Information

Order Number

# of Participants

Start Date

Trip
feb18can

You can search by Order Number, Payee Name, Participant Name or any of the fields listed here.

Payee Information

First Name

Last Name

Email

Home Phone

Work Phone

Cellular

Participant Information

First Name
amber

Last Name
hayes

Email

Telephone

Search Now

NOTE: *Do note enter the same name in both the 'Payee' and 'Participant' fields at the same time, as this will result in no orders being found.*

If you are searching for an order with a return leg to the trip, 2 results will appear, 1 line per trip leg.

4.8 **Add Extra Trip Information**

The 'Additional Trip Information' function allows you to add maps, trip dossiers, welcome packages and other information to your itinerary page, and attached to the receipt emailed to your customers.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action									

trip6364 Test trip apr 16

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact
Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip
Information

☑ ✗ Trip Dates

Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat		

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat	
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

> **Click <Additional Trip Information>**

Additional Information

This area is for entering additional trip information and links to your site that will be displayed to customers during the checkout process.

Heading	Content	Link	Email	Action

(Add)

> **Click here to add extra information.**

Additional Information

Add Additional Information for test trip(trip1018)

Heading: _____
Content: [   ]

External Link (optional): _____

Please ensure you links are correct.
AdventureEngine does not validate your link is working.

Include in Email Receipts ☐

(Cancel) (Save)

> **Assign your information a name, enter necessary content or instructions and provide the URL link.**

> **Your information will automatically appear on the itinerary page. Click here to also attached it to the email receipt.**

NOTE: *Your extra information will not be attached or stored on the Adventure Engine database. Instead, the customer will be provided with a link to the necessary information on your website.*

SECTION 5 – PROCESSING SALES

5.1 Processing An Offline Sale

This section shows you how to process a sale made from your office in your trip summary page.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact
Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip
Information

☑ ✖ Trip Dates · Seats Min Max · Seats Booked · * Seats Available · Price (CDN) · Hot Seat

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	Seats Available	Price		
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

> Click <Process a Sale> beside the date you want to add a sale to.

> Click <Add> to process (record) a sale.

Offline Sales Summary

Trip Name: Return test trip
Start Date and Time: 2008-05-12 at
Add | Return to Trip Summary

Order Number	Transaction Date	Seats	Extras	Notes

Enter the sale information here.

Enter the number of seats you sold here for each price category.

Offline Sale

Return test trip
Start Date and Time: 2008-05-26

Total Seats   10
Available Seats   9

Participants

Description	Number	Price
Base Rate		$ 600.00(CDN)

Enter any manual price changes here in the 'Discount' and 'Premium' fields. You can also enter a coupon code.

Discount (CDN) $_____ Coupon: _____   ADD
Premium (CDN) $_____
SubTotal of Trip (CDN) $0.00
Flat Fee Per Person   0
Total Price of Trip
Including Tax and Fees (CDN) $_____
Payment Method   Full Payment ▾
Deposit (set at): $_____   ☐ Override this value?

Choose 'Full payment' or 'Deposit' from the menu. The deposit will automatically be calculated, but you can manually override it as well.

If payment was received and processed by you, click one of the following options:
● Credit card
○ Paypal or other online pymt
○ Cash / Other
○ 3rd party / agent booking

Choose the form of payment here if you have accepted and processed payment in your office.

☐ Click here if you wish to use our online merchant account to process payment. ❓

Click here if you want to process payment using the Adventure Engine online merchant account.

Notes

Save   Cancel

Enter any extra information or notes here.

Questions

Trip Name	test trip
Start Date and Time	2005-12-25 at 09:00 am

These are questions entered by your specific tour operator. Please complete these questions to the best of your ability.

adult 1

First Name   [_____]
City   [_____]
Sex   ○ M ○ F
Age   [_____]
additional client name [_____]
additional client email [_____]
allergies   [_____]
food preference   [_____]

Complete the customer contact and custom questions. These are the questions you programmed earlier. You can also come back later to complete this form.

5.2 Process Balances Owing (As An Operator)

Click the <Balance Owing> link from menu.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

Balance Owing

Click the Order Number to get Payee Details.

Order Number	Transaction Date	Trip Name	Date of Journey	Customer Name	Balance Owing	Due Date
93071	2008-05-05 01:30:10	Test trip apr 16	2008-04-24	Ace Babs	$ 75.92 (CDN) Click Here to Pay	2008-04-24

Click on the Order number to see the payee details.

Click here to pay the remaining balance owing.

Payment

Order Number: 1119B
Balance Due: $ 215.34(CDN)

Paid by
- ● Check   ○ Cash   ○ Other
- ○ Visa   ○ Mastercard

☐ Process as online payment? ❓

Notes:

Additional notes will be appended to orginal order.

e **Continue**

> Select the payment type, or click this box if you wish to use the Adventure Engine online merchant account.

> Add any additional notes, then click

Success

Thank You!

The payment of $ 215.34(CDN) on order 1119B has been successfully received.

> A confirmation notice will appear.

							Receipts Report			
Order Number	Payment	Customer Name	No of Seats	Total Sales	Total Taxes	Total Amount	Trip ID	Payment Type	CC Charges	AE Fee
1117	Deposit	(Offline)	2	$ 19.45	$ 3.31	$ 22.76	feb18can (trip1105)	check	0	0.19
1118	Deposit	(Offline)	2	$ 21.45	$ 3.65	$ 25.10	feb18can (trip1105)	check	0	0.21
1119	Deposit	(Offline)	2	$ 20.45	$ 3.48	$ 23.93	feb18can (trip1105)	Mastercard (online)	0.57	0.2
1119	Balance	(Offline)	2	$ 184.05	$ 31.29	$ 215.34	feb18can (trip1105)	Mastercard (online)	0	1.84
TOTALS:			**8**	**$ 245.40**	**$ 41.73**	**$ 287.13**			**$ 0.57**	**$ 2.44**

Comm. means Commission

> In your report you will see the balance paid under 'Payment'. The order number remains the same, but the balance payment is listed on a separate line.

NOTE: *You can also use the 'Find Order' function found in section 4.8 of this manual to find and process a balance owing.*

5.3 Process Balances Owing (As A Customer)

If clients have paid a deposit on your portal or the Adventure Engine website, they can log back in to pay their balance. If the deposit was paid as an offline sale by the operator, the balance must also be paid the same way.

YOUR TEMPLATE PAGE
** this is a demo portal your portal will show only the trips you want and be in your template and site. Clients shopping do not leave your site.

ABC TOURs Inc

Currency:

US Dollars

Join Up | My Account | My Trips | Log In | Search Page | Shopping Cart

Customers can go back to your portal and login.

Simple Search   Advanced Search

For best results, please use Internet Explorer.   Powered by adventure engine.com

Activity	All activities
Availability	Any Month to Any Month 2006
Group Size	Any
Price	Any
(or) Keyword Search	

Search Now

YOUR TEMPLATE PAGE
** this is a demo portal your portal will show only the trips you want and be in your template and site. Clients shopping do not leave your site.

ABC TOURs Inc

Currency:

US Dollars

My Account | My Trips | Log Out | Search Page | Shopping Cart

Click <My Trips>.

Click here to pay the outstanding amount and follow the credit card payment prompts.

My Trips

S.No	Order Date	Trip Name	Date of Journey	Number of Travelers	Order Status	Outstanding Amount ($)	Due Date	Disp book
1	2006-02-21	3 day wilderness explorer	2006-04-06 4:44 pm	1Traveler(s)	Due	$ 107.00(USD) Click Here to Pay	2006-03-16	☐
2	2005-10-31	Utah Multisport Trip	2005-11-14 09:00 am	3Traveler(s)	Paid			☐
3	2005-10-31	Purcel Mountain Lodge 3 day retreat	2005-12-03 8:00 am	2Traveler(s)	Paid			☐
4	2005-10-04	demo trip	2005-10-15 9:00 am	1Traveler(s)	Paid			☐

SECTION 6 – EDITS & ADDITIONS

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms an

6.1 Edit Company Profile
Click here to edit your company profile, password, contact info, reseller commissions, etc.

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

6.2 Edit Overall Trip Details

These menu items are for editing overall trip info. Text & descriptive changes will affect all recurrences of your trip.

Changing the base price will only affect NEW dates added after the change is made.

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact
Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip
Information

☑ ✗ Trip Dates

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat		
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

[Update Price] [Change Date] [Change Seats] [Delete] [Change Times]

6.3 Edit Individual or Multiple Trip Dates
Check off the box(es) to the left of the date you want to edit and then choose from one of the blue buttons at the bottom
NOTE: *you cannot update price for dates that have bookings made*

NOTE: *The price entered on the 'Edit Trip' page will always show as the base price that customers see when viewing search results online, even if you have changed the price for individual dates. If you wish to change the base price listed online, click the <Edit Trip> link on the trip summary page.*

6.4 Create Seasonal Pricing

NOTE: *Include your pricing details in your itinerary section. You will want to notify customers these prices and terms are available, otherwise they will not see it until*

Trip Summary

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip Information

Click <Edit Price>

☑ ✗ Trip Dates

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat	
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

Edit Price

Edit Prices - Base Pricing for canada2
(Will only affects occurrences created after this has been saved)

Age Discount

Description	Discount($)
Base Rate	$0 ⓘ Change Base
(Base Rate - no age charges)	Price: $ 100
kids	25.25

Change the base price

Extra Charges

Description	Cost($)	Units Available
lunch	10.5	105

Edit extras and discounts

Group Discount

Description	Amount	Group Size
▼		

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	

Edit Trip
Edit Price
Edit Itinerary
Add Dates
Add a Client Form
Add Contact
Questions
Delete Entire Trip
Add Seats to All
Edit Min Deposit
Additional Trip Information

Click <Add Dates>

☑ ✗ Trip Dates

Note: Rows with light blue background have seats booked. These cannot be deleted nor can their price(s) be changed.
* "Seats Available" marked with a * have been adjusted to reflect limited inventory availability

	Trip Dates	Seats	Min	Max	Seats Booked	* Seats Available	Price (CDN)	Hot Seat		
☐	12-May-2008 to 14-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	19-May-2008 to 21-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	26-May-2008 to 28-May-2008	10	1	10	0	10	1500	Add	Process a sale
☐	02-Jun-2008 to 04-Jun-2008	10	1	10	0	10	1500	Add	Process a sale

(Update Price) (Change Date) (Change Seats) (Delete) (Change Times)

Add Dates

Add Dates Step 4 of 6
How often does your trip occur?
For multi-day trips, the date entered is the date of the first day of the trip.

⊙ *Once* Date [_____] 📅

Choose the dates you want to add

○ *Weekly* ❓ Recur for [____] week(s) starting [_____] 📅 on:

☐ Sunday ☐ Monday ☐ Tuesday ☐ Wednesday
☐ Thursday ☐ Friday ☐ Saturday

Create trip dates by entering the date and clicking the add button.

[_____] 📅

○ *Random*

[   ]
❓

Continue with start time and number of seats

(Add) (Remove)

(Next)

NOTE: *When you change the price with the menu to the left, it will ONLY be reflected in NEW dates added after that change. If you want to change price of an existing date, click the square to the left of the date(s) and use the 'Change Price' button in the bottom menu.*

6.5 Edit Customer Answers

Customer answers and contact information can be updated or edited by using the 'Find Order' feature.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

Click <Find Order>

Find Order

General Information

Order Number	# of Participants	Start Date

Trip
feb18can

Enter the search parameters

Payee Information

First Name	Last Name	Email

Home Phone	Work Phone	Cellular

Participant Information

First Name	Last Name	Email
amber	hayes	

Telephone

Search Now

Find Order Results

Return to Search

Line #	Order Number	Payee Name	Email	Start Date	Seats Booked	Order Price	Balance	Trip Id		
			(Displaying 1 to 1 of 1 orders)							
1	1117	Offline		2006-03-04	2	227.57	0	trip1105	View	Edit

Page: **1**

Click <Edit> in the search results.

Edit Order | View Order

General Information

Order Number
1117

# of Participants
2

Start Date
2006-03-04

Trip
trip1105

Balance owing
0

Payee Information

First Name

Last Name

Email

Home Phone

Work Phone

Cellular

Age

Sex

City

Province/State

Country

Postal Code/Zip

Participant Information

adult 1

First Name
amber

Last Name
hayes

Address Line 1

City

Email

Allergies
bees

can you swim
yes

Complete or edit any fields.

6.6 Currency

Shoppers can choose their currency of choice when shopping online, and Adventure Engine converts your trip price for shoppers.

The customer can choose their currency here.

As an operator, you choose your preferred currency when you register.

Company Information

Registration – Company Information
* indicates required information You can come back to change your information at any time.

Company Name *
Contact Person Name *
Mailing Address *
Street Address
(If different from above)
City/Town *
Prov/State *
Country *
Zip/Postal Code *
Phone Number *
Toll Free
E-mail *
Website
GIS
Years in Business *

Company Profile *

Open to Resellers ☐ Yes
Percentage Offered _____ %
Hiring ☐ Yes
Preferred Currency [US Dollars ▾]

Choose your currency preference here.

Go Back   Next

You can later update or change your currency of choice.

> **NOTE:** *If you change your currency, you must update your prices accordingly. If you already sold trips, our staff will manually update those trip prices for you.*

From your trip summary page, place your cursor over the 'My Account' link and choose <My Preferences>.
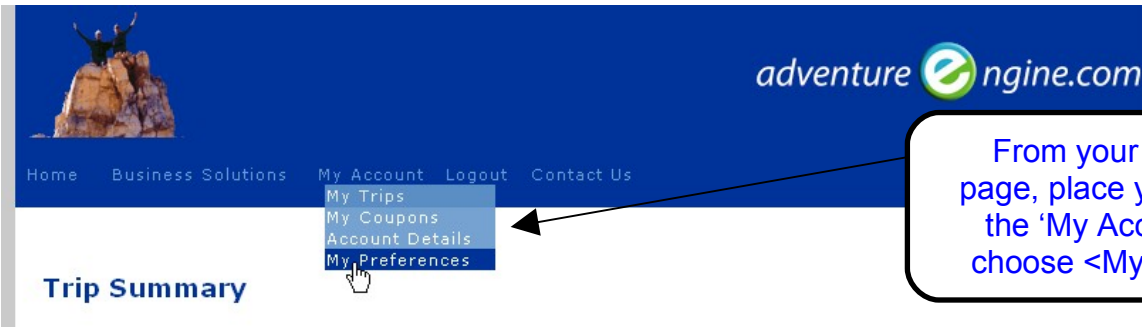
Then choose your currency and click <Update>. Now you will have to update your prices (see section 5.4).

> **NOTE:** *Your email confirmations, reports and receipts will all appear in the currency of your choice.*

6.7 Set Custom Commission Rates

You can assign custom commission rates for up to ten different distributors. If no custom rates are programmed, the system will default to the assigned rate you programmed when registering.

From the trip summary page, place your cursor over the 'My Account' link and choose <My Resellers>.

As a supplier, make sure you set your own portal to 0% commission.

Select the reseller for whom you wish to set a custom rate.

Type the custom commission amount.

The Adventure Engine system will track the commissions paid to each distributor and you can review details in your reporting area.

SECTION 7 - TRANSFERS, CANCELLATIONS & REFUNDS

7.1 Transfers

Use this feature when your client wishes to change dates, but still go on the same trip. The system will adjust your seat availability accordingly.

Example: client has 2 seats booked for July 25 and wishes to transfer to August 3. When you process the transfer, 2 seats will be added back to July 25 and removed from August 3. All client information will be transferred to the new date for trip reporting purposes.

Trip Summary

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

> Click <Find Order>

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

Find Order Results

Return to Search

before
after

Line #	Order Number	Payee Name	Email	Start Date	Seats Booked	Order Price	Balance	Trip Id		
				(Displaying 1 to 20 of 20 orders)						
1	93070	Howard Johnson		30-Apr-2008	1	$ 1,200.00 (CDN)	$ 0.00 (CDN)	Test trip apr 16 (trip6364)	View	Edit
2	93071	Ace Babs		24-Apr-2008	4	$ 2,486.50 (CDN)	$ 75.92 (CDN)	Test trip apr 16 (trip6364)	View	Edit

> Click <Edit> beside the order you wish to transfer.

Return to Results

[Add to Order] [Refund/Cancel] [Transfer] [View Order]

> Click the <Transfer> tab.

Test trip apr 16

Start Date	24-Apr-2008
End Date	24-Apr-2008
Number of Nights	3
Balance owing	CDN$ 75.92 Pay Balance

Customer Information

First Name	Last Name	Email
Ace	Babs	
Home Phone	**Work Phone**	**Cellular**
Age	**Sex**	**City**
	M	
Province/State	**Country**	**Postal Code/Zip**

| Add to Order | Refund/Cancel | Transfer | View Order | Edit Order |

Test trip apr 16

Start Date	24-Apr-2008
End Date	24-Apr-2008
Number of Nights	3
Balance owing	CDN$ 75.92 *Pay Balance*
Transfer to	2008-05-12- ▾

Click the 'Transfer to' window and all dates available for transfer will appear.

NOTE: *Only trips with seats available to match the seats you are transferring will appear.*

Notes
Back to top

Full

Addition

`<br>Moved from 2008-04-19 10:00 am to 2008-04-24`

Additional Notes

Add any notes you wish to save.

Transfer

Notes
Back to top

Full

Addition

`<br>Moved from 2008-04-19 10:00 am to 2008-04-24`

The order details will now show a history of the transfer

7.2 Cancellations & Refunds

Trip Summary

Click <Find order>.

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action	
trip6364	Test trip apr 16		Click to see trip occurences.

Find Order Results

Return to Search

before
after

Line #	Order Number	Payee Name	Email	Start Date	Seats Booked	Order Price	Balance	Trip Id		
				(Displaying 1 to 20 of 20 orders)						
1	93070	Howard Johnson		30-Apr-2008	1	$ 1,200.00 (CDN)	$ 0.00 (CDN)	Test trip apr 16 (trip6364)	View	Edit
2	93071	Ace Babs		24-Apr-2008	4	$ 2,486.50 (CDN)	$ 75.92 (CDN)	Test trip apr 16 (trip6364)	View	Edit

Click on <Edit> beside the order you wish to transfer.

Click the <Refund / Cancel> tab.

Add to Order | Refund/Cancel | Transfer | View Order | Edit Order

Test trip apr 16

Start Date	24-Apr-2008
End Date	24-Apr-2008
Number of Nights	3
Balance owing	CDN$ 75.92 Pay Balance

Refund Information

Refunds will be made in the currency of the supplier preference (CDN). Refund amounts can be left as zero if no refund has been made.

Refund Amount: (CDN)$ _____

If refund was processed by you, click one of the following options :

○ Credit card
○ Paypal or other online pymt
○ Cash / Other
○ 3rd party / agent booking

☐ here is you wish to use our online merchant account to process a refund. This function should only be used if our merchant account was used to complete the original sale. This will adjust inventory and reporting instantly however a delay of 12-24 hours may be experienced for refund to be processed to credit card.

If a refund / credit / adjustment is being provided, enter the amount here followed by refund pymt type.

NOTE: *Enter the entire refund amount including taxes. Refunds will be applied to the balance owing first, then reflected as owing to the customer.*

Click here if you want to refund the customer using our merchant account. (Please see below for our refund policy and fees).

Cancel Information

Canceling an order will free up any seats or extras purchased. The supplier is still responsible for any commissions on this sale.
Removing all Participants from the order will have the same result as cancelling.

Cancel Order: ☐

If all participants are canceling click <Cancel Order>. Enter the refund amount above if a refund is being provided.

Page Section QuickLinks:

Remove one or more participants	Jump
Remove Extras	Jump
Edit Notes	Jump

Kristi testing april 16 (sup1974)
Contact: kristi
Email: clientcare@adventureengine.com
Phone: 111-222-3333

Order Statement
Order Number: 93071

Ace Babs

Order Details

4 seats on Test trip apr 16 (trip6364)
Trip Dates : 24-Apr-2008 to 24-Apr-2008

```
0 x Per person rate($ 1,500.00(CDN)) x 3
nights
2 x Children under 5($ 500.00(CDN)) x 3
nights
1 x Extra 1($ 10.00(CDN))
1 x Extra 2($ 15.00(CDN))           CDN$ 2485.92

TAX                                 CDN$ 0.58
TOTAL                               CDN$ 2486.50     CDN$ 75.92
```

Order History

Transaction Date	Description	Amount	Balance
16-Apr-2008 11:15pm	Purchase(creditCard) 2 Seats on Test trip apr 16 (trip6364)	$2411.50(CDN)	$2411.50 (CDN)
16-Apr-2008 11:15pm	Payment	- $2411.50(CDN)	$0.00(CDN)

Participant Information
Back to top

Removing participants will decrease the number of seats associated with this order. These seats will then become available for sale again.

Children under 5-1   ☐ Remove Participant

First Name	Ace
Last Name	Babs
Address Line 1	
Address Line 2	
City	
State/Province	
Country	
Zip/Postal Code	
Telephone	
Email	
Sex	⦿ M ◯
Age	
Allergies	
Do you have allergies?	No
What is your favourite colour	

Select the participants that are canceling. You can remove any number of participants and the system will automatically return the inventory and update the new seat availability.

Removing Extras
Back to top

Removing extras will decrease the number of each extra associated with this order. These extras will then become available for sale again.

NOTE: The balance due amount is *not* updated automatically. If removing Extras creates a refund please process the refund amount manually using the fields above to correspond to your changes here.

Description:	Original Number:	New Number:
Extra 1	1	
Extra 2	1	

If any 'Extras' were purchased, you can cancel them here to return back to inventory.

Notes
Back to top

Additional Notes

Save

| Refund/Cancel | Transfer | View Order | Edit Order |

Successfully modified

General Information

Order Number	# of Participants	Start Date
2015	0	2006-04-15-9:00 am

Trip	Balance owing	
trip1115	0	

south fork - full river run

Payee Information

First Name	Last Name	Email

Home Phone	Work Phone	Cellular

Age	Sex	City

Province/State	Country	Postal Code/Zip

Participant Information

Order History

Date Changed	User	Description	
2006-07-17 14:24:36	feb19us	Canceled Order	Show Notes

Save

> The cancellation will now show in the order details. If this booking was made by an agent, these details will also appear in their login.

NOTE: Refund and Cancellation Policy
1) It is your responsibility to process any cancellations or adjustments for your customers
2) We will process refunds on your behalf through our online merchant account only if you click the box requesting this at the time of refund
3) A $10 administration fee will apply each time you process a refund using the Adventure Engine merchant account.
4) Refunds may take up to 24 hours to process
5) When you process a refund, this will first be applied to the balance owing. A refund will be processed for the customer only if the refund amount is more than the balance owing. Please see examples below

Balance owing = $1500
 Refund processed = $1000
 Supplier choose to process using the AE merchant account
 Balance owing adjusts to $500, no refund processed to credit card

Balance owing = $1500
 Refund processed = $2000
 Supplier did not choose to process using the AE merchant account
 Balance owing adjusts to $0, $500 refund is shown, no refund processed to credit card

Balance owing $1500
 Refund processed = $2000
 Supplier choose to process using the AE merchant account

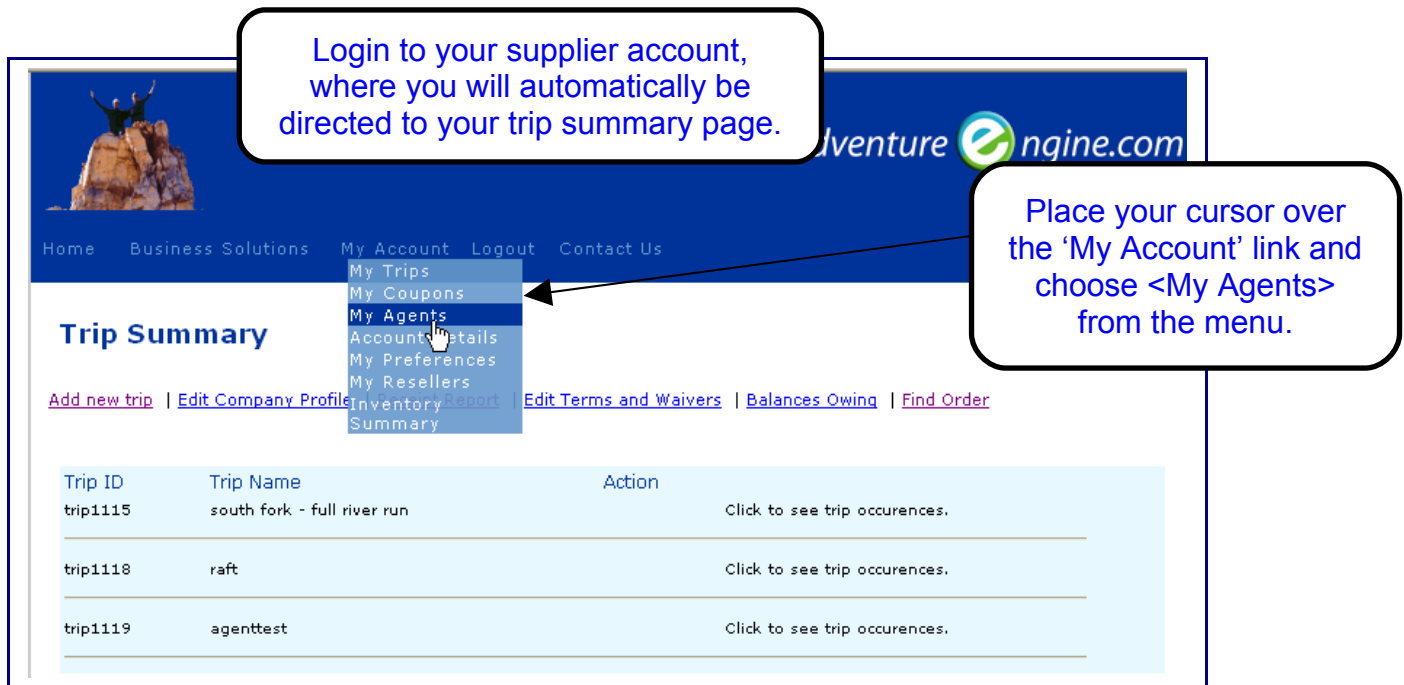# SECTION 8 – ADVENTURE ENGINE AGENT MODULE

The 'Net Rate Module' is an add-on feature to the basic Adventure Engine subscription that carry's a one time start-up fee. Please contact Adventure Engine staff to activate this module on your account.

This is where you can select your agents and assign them trips, various privileges, and set your net rates.

NOTE: *When you create an agent with net rates assigned, they will not have the ability to manually assign a discount or premium when processing a sale. Also, the 'add to order' feature will not be activated for the agent. Rather, they will need to process a new sale to add an additional item to the sale.*

Login to your supplier account, where you will automatically be directed to your trip summary page.

Place your cursor over the 'My Account' link and choose <My Agents> from the menu.

All distributors with agent status will appear in your drop down list
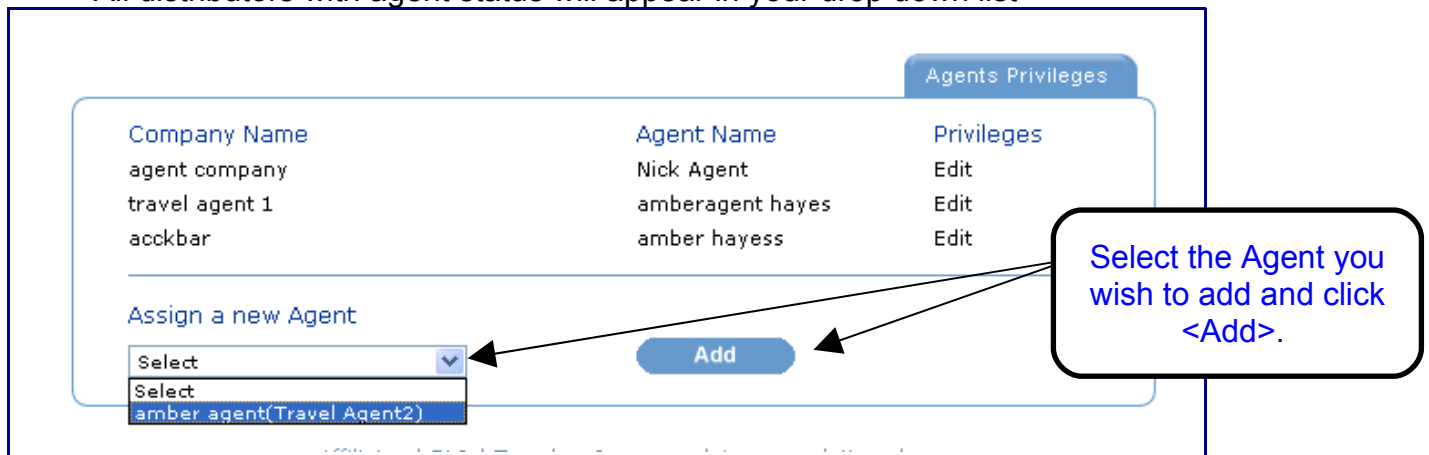
Select the Agent you wish to add and click <Add>.

8.1 Assign privileges

The agent privileges page will show a listing of all of your trips currently in the AE database.

Choose the Trips you want this agent to carry by checking the box beside each trip name.

For each trip, choose if you want the net rate to be a % or flat fee deducted from your retail rate.

Enter the amount to be discounted here.

Click here if you want the agent to see your retail price on their offline sales screen. If you do not click it, then the agent will see their net rate price.

Check these boxes to allow your agent to override your net rate amount. This is only recommended for staff or well-established agent relations capable of collecting more or less money for your trips.

NOTE: *Net rate is calculated as a dollar or a percentage amount off your rack rate (the retail price you programmed when you loaded the trip to the system).*
Example: Rack rate $100 - 10% discount = $90 net rate. This means that the agent owes you $90 if they sell a trip. They will have collected already from their customer and you must invoice them for the net rate amount. When you run a report, you can select to run a report by each agent. This report will show the number of trips they have sold for you and the net rate they owe you.

8.2 Assign Security

You can ssign security according to your relationship and agreement with your agent.

Staff Security

Security Level	Grant
Can Modify Company	☑
Can Modify Staff	☑
Can Modify Staff Privileges	☑
Can Process a Sale	☑
Can Process a Transfer	☑
Can Process a Refund/Cancel	☑
Can Edit an Order	☑
Can see all orders from Agency	☑
Can see all orders from Supplier	☑
Can Process Merchant Sales through AE account	☑
Can run reports	☑

Save   **Cancel**

This allows the ability for the agent to change their own company contact information.

This allows the agent to set privileges for their own agent staff

This allows the ability for the agent to add additional agent staff.

This allows your agent to run a report. This feature is required for Agents to use the system to calculate amounts owing to supplier.

8.3 Edit

You can edit and change your agent settings and privileges at any time.

Agents Privileges

Company Name	Privileges	Security
Nick Agency	Edit	Edit

Assign a new Agency

Select ▼   **Add**

1. Login
2. Choose <My Agents>
3. Select <Edit>

8.4 Reporting

When your agent processes a sale it will automatically be reflected in your trip summary area and update the seat availability. Both agents and suppliers can access the order and edit customer information if required.

Trip Summary

Click <Operator Reports>

Add new trip | Edit Company Profile | Operator Reports | Edit Terms and Waivers | Balances Owing | Find Order

Trip ID	Trip Name	Action
trip6364	Test trip apr 16	Click to see trip occurences.

Trip ID:
```
ALL
trip6364-Test trip apr 16
trip6365-Return test trip
trip6366-Log Cabin Accommodation
```

Choose one trip, all trips or multiple trips using Ctrl key.

Agent ID: All Agents

Choose all or one agent.

Order By: Order Transaction Date

From Order Date: ☒Clear Field

To Order Date: ☒Clear Field

From Seat Date: ☒Clear Field

Choose a date range by order date or by trip date

To Seat Date: **Note:** If you leave the 'to' date blank, the report will default to today's date

☐ (Select All)

General & Accounting Information

☐ Order Date
☐ Order Number
☐ Offline Sales Notes
☐ Sale
☐ Taxes
☐ Total Sale
☐ Amount Received

☐ Dist.Name
☐ Dist.Comm
☐ Agency
☐ Agent Name
☐ Agent Discount
☐ Net Rate (agent owing)
☐ Balance Owing
☐ Coupons Used

Choose specific items that you wish to see in your report.

Customer Information

☐ Customer Name
☐ Email
☐ Address
☐ Phone 1
☐ Phone 2

Trip Information

☐ Trip Name
☐ Trip Date
☐ Trip Duration
☐ Seats Sold

☐ Age Discounts
☐ Customer Notes
☐ Extras

Participant Contact Information

☐ First Name
☐ Last Name
☐ Sex

Participant Questions

Note: Selecting Custom Questions as a report option is only recommended when choosing 1 trip. If you have different questions for each and you select multiple trips, the report may have a large number of columns.

☐ Do you have allergies?
☐ What is your favourite colour

[Load]
[Delete]
[Save]

Note: Using the name of an existing report will cause the old report to be overwritten.

[Submit]

NOTE: *'Total Sale Amount' for agent sales represents the net rate amount that agents purchased from you, not your own retail amount. This is the amount you should invoice your agents.*

LINKS

The demo website is available to browse the Adventure Engine database.
http://demo.adventuengine.com

If you would like to try the system as a supplier, reseller(portal) or a customer please use the login instructions below.
Login: demo
Password: demodemo
Type: choose the login type you want to try

Visit our Video Demo 'How To' area for brief demonstrations of various content in this manual.
http://www.adventureengine.com/movies.php