Travelize User manual

Table of contents

System administration

User overview

The report shows all active users as default. Click on the link include all to see also inactive users. You also add new users from this page through the add new user link.

You will find the following user levels in the system:

1. Active: Used for internal sales people that only need to book, print confirmations and access lists such as hotel lists, transport lists etc.
2. User administration: Gives access to set up users and amend users. Normally strictly limited to a few users.
3. Travel administration. Access to prices, allocation and travel resources.
4. Finance. All finance functions and statistical functions as well as normal booking functions.
5. Transport lists. This option is only used when you want to give access to an external company with access to some limited lists (hotel lists, transport lists etc). Do not tick this alternative for normal users.

To add a new user: Select an unique username for different users. Fill in the fields with the information required. An e-mail will now be sent to the user and giving that person access to the system with a temporary password.

Change password:
Any user can change his/her password by clicking on change password. Make the password simple to remember but not easy to find out.

Inactivate or amend a user: Inactivate by clicking no instead of yes in all boxes. The user will not be able to log in again.

Amend a user: If the user has changed name or e-mail address you can enter the user's login and change whatever needs to be changed. Click on reactivate and an e-mail will be sent to the user.

If a user has forgotten the password, press the Reset link for this user in the overview. A new system generated e-mail will be sent to the user's e-mail address.

You will also find links to different statistics such as history of login, changing passwords etc.

Log history and reports

History login. Shows successful logins to the system (User, date and IP number).
History login errors. Show logins that have not been successful. Repeated login errors shall be checked on a regular basis.

Changing password. Shows all changes of password done in the system.
History new users. Shows all new users added to the system.

System parameters

Travelize has a lot of system parameters making it possible to customize your system. Parameters are sorted into groups of functions and you can either choose to browse a group or use the search function to find the parameter you wish to look at or amend.

Many parameters are only available for Travelize support staff.

All parameters are in English. You can not use a local language to browse and find functions.

Search for new parameters. With regularity you should search for new functions/parameters. Add a date to browse all new parameters from that date and onwards.

Parameter values. A parameter can have different settings/values. To amend a parameter push show. The different kinds of settings are described below:

False/true. Choose yes to activate and choose no to inactivate the parameter.

String. This is a parameter for text. Use quotation marks (") around the text.

Numeric. This is a parameter where you need to insert numerical values.

Edit text

This function will make it possible to store different message texts. There are several options as described below:

Intro text agents. If you are working with agents you will use this possibility to add a text to the mail that every agent will receive when you add them as agent users. (E.g. Welcome to Travelize agent booking. Please note the following....).

Welcome to bookings. In the package engine in step 1 you can insert a text to help customers making their bookings (Welcome to Travelize package booking. Start by choosing a destination.....).

Message. Store different messages (used in connection with the function write letter/messages in customer administration). Useful if you send the same letters to your clients regularly (change of flight, cancelled tour etc). By storing these messages here you will save time when sending out letters in Customer administration / Send mail/message.

Free text. Use this to store texts for your vouchers (read more about vouchers in package calculation)

To add texts to the system you will start by **clicking the link add text**. You will be taken to a new window:

Insert a name (Ex cancelled tour)
Text. Enter the text you want to store.

Amend texts for confirmations (printed/e-mail) and contact admin

Select the type of texts you would like to amend.

You see the labels and by clicking the label you can receive more information about it. Enter the new text in the box.

Install OCR font

OCR - Optical Code Reading - is a system used extensively by banks to automatically read pay slips and similar. This requires special fonts not available in standard set up of Internet Explorer. To use this functionality, all your computers which will print this kind of confirmations need to install an OCR font.

1. Purchase an OCR font, e.g. from www.myfonts.com/fonts/ecma/ocr-b/familytree.html For Scandinavian OCR the OCRBLetM is used It is also known as OCR B Letterpress M.

2. Copy the font into the folder for fonts, normally "c:\WINDOWS\FONTS\". When you have copied the font, you might need to restart the computer. Go into Word and check that in the font list, you find "OCRBletM". If not, repeat the procedure from start of bullet 2.

Other settings you need to do to properly print confirmations are done in Explorer / File / printer settings:

- Header and footer have to be empty.

- Margins at top and left should normally be 6 mm and right and bottom as small as possible (many printers will set these up to 3.5 as that is the minimum margin they can operate with). Fine tuning is done by adjusting the top and left margin (never bottom and right - they should always be as low as possible).

Please note: In contrast to other settings in Travelize, the settings regarding external printing is made on each computer that is going to print.

In Swedish, Norwegian and Danish systems Travelize uses a method called Modulus 10 to calculate the last digit (control digit) in the OCR-number. In Travelize systems OCR-numbers consist of six digits and one control digit. This information your bank needs to know.

Contact administration

All contact errands from the home page are stored directly in the Travelize application.

On the admin start page you will see all "active" errands, i.e. errands that are 1) new, 2) have a follow up date equal or less than today's date and 3) errands with new replies from the customer.

You can also access the Contact Administration from System Administration.

Reply to the errands directly from the application. The mail will be sent out once you press the Send button. You can also set a follow up date when you will have the errand back as an errand with required action. Please note that a standard text is included in the message which allows your customer to reply into the application. You should leave this at the bottom of your message.

Notice, an errand will remain in the active window if the follow up date is reached even after you have replied. You have to set the up date to a later date or delete it to remove the errand from the active list.

You can set the status and also your responsible person.

If you would like to see an old errand which is not on the list of "active" errands, you can search for the errand in the search functions in the upper right part of the page. You only need to fill in one of the fields.

Support

You will receive extensive support as a user of the Travelize system. All support errands are handled in built support function of your system.

You need a basic Travelize training before you can start using the support. A support errand will be logged with your user name and the errand is automatically stored in our support central database.

You have also access to the support online manual and you will find detailed instructions to all functions in the system. By clicking the help bubble a new window will appear with the online text. If you wish you can print these instructions. On the Travelize web page you will also find a FAQ function. The FAQ contains all support errands relevant to a certain issue/question.

Support central

All support errands are automatically distributed to our support central. A new errand will be taken care of by one of our support staff. You will receive an answer by mail (your user e-mail address).

Please observe that it is important to use the answer link in the support mail if you want to continue the errand. By using the link your questions is added to original errand and much easier to follow for our staff. The support central contains all your support errands and you can search for errands.

Rules for child discounts

Here you will find descriptions of the available child discounts rules. New rules can be added on request.

A detailed description of how the child discount works is given in English while the same matrix is used by all organizers using the system. You can name the system in your local language, which will be used to show which discount rule is applying.

Set to Active the rules you want to be able to connect to your project. In the project you choose from a list of rules (set to active) which rule will be applied.

Travel administration

Introduction to travel resources

Tours can be booked in two different of principle ways; either as a complete package or in a dynamic booking (also called A la carte / ALC) where the different components are put together when booking. For both these ways to book, travel arrangements which are added under TRAVELADMINISTRATION / Add/amend travel arrangements, are used as base. Travel arrangements is for example transports, hotel with room types and room allotment for each room type, ferries, connection net for buses (also known as timetable), allotment based additions and more.

Allotment is set on all these arrangements. Project is the compound package that you book on when package booking. Each project is a unique tour on a certain date, to a certain hotel etc. The project is connected to the underlying resources which have to be set first. Projects can either be added each by themselves, be copied from an earlier project, or be loaded in series. The price for the package is set on the project and can be calculated from the underlying resources when loading, but this is not required.

Allotment limitation is set automatically for the most limited resource that is connected to the project. At dynamic booking, the project is not used but instead rules are set for how the dynamic booking can be made and all pricing is done directly on the underlying resources. Product is, unlike the other travel arrangements, not allotment based and does not apply to a certain point of time.

All packages and also dynamic booking are tied to a product that contains overall information about destinations to show in the booking engine and similar, and connection to additions sold without allotment limitations.

See more information under each travel arrangement.

Product

The product contains basic information about the tour. In many cases the product is the destination but it can also be several different products with different included items or different additions on a destination. There are no allotments connected to the product.

Product code: This will be used to connect the product to a project, hotel etc. Use a short name but easily recognizable, e g LON for London. If you mass-load tours, this code will be included in the tour code.

Interest code: Some travel portals are using short codes to be able to index and sort different packages. Contact Travelize support if you need exports to travel portals.

Destination: You will insert the full name of the destination here. The name of the destination will be visible in the booking engine step 1.

Country: The country of the destination. This field is not used by the system. Some travel portals want to be able to sort packages by country and this field can be used for this purpose.

Additions: You can add additions directly on the product. An addition can be an excursion, insurance etc. In the box named Additions you will write the name of the addition. This information will be displayed in the booking engine in step 3. Add the price in the next box. You have three possibilities how you would like clients to book the addition.
Yes= the addition is ticked. The client needs to untick the box to avoid choosing the addition.
No= the addition is not ticked.
Mand= The addition is ticked and can not be unticked by the client thus mandatory.
Admin= Only available for logged in admin.

Included in the package: This information will be displayed in the booking system in step 2 as well as on the reservation confirmation. You can add what is included in the package here.

Picture. Only used by companies with the enterprise module. A picture is chosen and together with the text will be presented on a web page. This only possible with a special web design. Used by destination companies to control web layout and makes it easier for small companies to add text and picture to a web site.

Do not include this Product in destination search. A product that is no longer used by you in the system can be inactivated by ticking this box. The destination name will disappear from the scroll menu in step 1 (booking engine), unless the system is set to automatically display active products.

Language. Used by companies with the Multilanguage module. You can translate product text into several languages here.

Changes: All changes are logged in the system. By clicking on changes (will only appear if changes have been made) you can see what has been changed, by who and when.

Transport

Please observe that you need to enter a transport for the OUTBOUND as well as for the INBOUND transport in order to create a package. The only time where you do not need to create an outbound and inbound transport is when you are creating a package without hotels and cabins. An example could be a day tour with transport only.

You can choose to copy an already existing transport or create a new one. To copy use the copy function. Find the transport that you want to copy. **DO NOT USE** copy when you build a transport series. Enter it as a new series.

Functions:

Name of transport. Use a code for the transport (ex London= lon) and add the date of the transport (lon2003-11-20).Out=outbound and IN=inbound will automatically be added to the name of the transport

Main ID. Used when loading a series of transports. An ID could be Lon (for London).

Departure date: The date for the transport.

Direction: OUT for departure transports and RETURN for homebound transports.

Flight number. Insert the flight number here if you want to be displayed in the booking as well as on the reservation confirmation.

Allotment: The maximum number that the transport can take.

Release. Insert the number of days before the departure. The release will automatically set allotment to 0. If you want to open up the transport again after release of allotment you need to go to amend transport and add allotment. Do not forget to change the number of days in the release field or the allotment will be set at 0 again. Release is only active if this has been activated by Travelize.

Connection: If the transport is served by coach connections you need to connect it by choosing the connection here. By holding down the CTRL tab you can add more than one connection for the transport. If you do not use connection leave this empty.

Cabins. If you want to connect a cabin to the transport you will be transferred to the cabin part after updating the new transport. **Please not that cabins will only appear in amend transport and is not visible when you are working with the document new transport**.

Special option 1: You can enter a special option connected to the transport. This option is allotment controlled. Special options can business class, sleeping coach etc. Please observe that when adding the price for a special option you do it ONCE. Add the total price for the special option on the outbound transport and leave the inbound to 0.

Special option 2: Is not used for the moment. Shall have 0 in the box.

Flight surcharge: The surcharge is per person and you will add the total amount on the outbound transport. Leave homebound to 0.

Security fee: Is not used for the moment. Leave to 0.

Duration. If you are using the ALC module this field will give you the possibility to decide how this transport can be booked. By adding 3 here, this transport can only be booked with duration three days.

Type of transport. Used by companies selling packages with different means of transports (flight, coach etc). The web design will recognize the type of transport and can sort packages after type of transport.

Name for transports. Used by companies that needs additional information to the transport code.

Status. Gives you the possibility to open, close or select internal sales only on a transport. Only valid for companies using the ALC module and will only affect the status ALC/dynamic booking.

Calculation (not mandatory to fill in!). Calculations on transports are used for price calculations. It is also used to set a price for transports only.

Currency. The currency that you will be charged with from the supplier.

Account. If sold as a transport only and if you want revenues to be connected to a special revenue account you can add the account here.

Travel VAT. Insert a value here if transport only are sold and you want the VAT value to be calculated when book keeping.

Fixed cost per transport. For a coach or at charter flight you might pay for the whole transport. Add the transport cost as a fixed amount and per transport (in or out).

Calculated number of pax. Add a number of pax that will be used to divide the fixed cost with.

Variable cost per pax. Either used for the transport cost and/or as a supplement to the fixed costs (road charges for a coach transport as an example)

Surcharge. If you are using surcharges for the price calculation.

Price ind. If you are selling transport only you can add the price her.

Infant price. For transport only and infants.

Flight information (not normally used for train/coach).

Departure city: If you do not use connections you will add the information about departure city here.

Departure time: Time of departure for the transport.

Meet up time. Time to meet up.

Arrival city. City of arrival on the outbound or inbound flight.

Estimated time of arrival: The time when the transport has reached its final destination.

Comments. Add a comment here and it will be displayed in the booking as well as on the reservation confirmation.

Information about pick up place: Normally used to inform about check in times, airport info etc.

LOAD

Load: Used to define the loading period as well as to name the transport series. You will only use this section if you want to create a series of transports.

Latest departure date for transport load. The latest date in the series for the OUT respectively for the IN transport.

Interval days between projects. The number of days that the series will be loaded in.

Starting number. If you instead of using dates to name the transports please add the starting number here.

Naming. Choose one out of three options to name the transport series.

Amend many transports at once

This function allows mass updating of transports. You can change most of the parameters you have on the different transports. On prices and similar you can enter an entirely new value, or a relative change.

To select transport, enter a unique part of the transport code. The system will look for all transports like what you enter. You can also limit (optional) by date bands as well as selecting which weekdays you would like to update (optional). In step 2 you will se all changes and can make individual changes before you confirm the update.

Allotment changes Note that when changing allotment all packages with these transport will updated. This can take time as the system needs to check each and every package.

Timetable

Copy from. You can copy an old timetable and create a new one.
Number of additional departure cities. You have 10 rows as a standard. If you have more departure cities please add the number in the box (ex you have 12 departure cities. Add 2 in the box).

Number of additional departure cities than in initial time table: If you copy a time table and want to add more departure cities, add a number here.

New number of departure cities. Change the default number if you want to add more or less departure city than the default number.

Timetable. Fill in a name for the timetable you want to create.

Active. All departure cities are set as default. By unticking the box you will inactivate that particular city and it will not appear in the booking engine but will still be part of the list.

Departure city. The name of the city.

Departure time. Time of the departure.

Start day. If one or more cities will have a departure time after midnight you will insert 1 here.

Estimated return. Time of return.

Departure fee. As an option you can add an additional fee here. If you do and the client selects a city with a fee, this will automatically be calculated in the total package price.

Information abort pick up place. Additional information about the pick up place.

Amend connection

Choose the connection that you want to amend.

Amend information and push update to save changes

Add one or more cities of departure. Choose the connection where you want to add cities. Insert the number of cities that you want to add. Push get to continue.
Insert the new cities and push update to save the amended connection.

Hotel and room allotment - overview

Hotel has two different functions in Travelize: to be able to create a bookable project containing some kind of accommodation, and as a content management document to present text and pictures. If you are not going to publish any information about the hotel on your website, but only use the hotel to add room allotment, you only need to **fill in the name under the header Hotel**. If you want to load a series you should also fill in the hotel code (see instruction load under travel administration).

To be able to book, you also have to add room types first and then room allotment. Room allotment is always set in periods, e.g. the seasons with different prices and allotment. All this is reflected on each day in the period and can then be edited on a daily basis.

NB: If you have made changes in the daily allotment and then make changes to the whole period, the changes done for the whole period will overwrite the changes made on daily basis.

Add Hotel

Hotel has two different functions in Travelize. To be able to create a bookable project containing some kind of accommodation you have to add a hotel. If you are not going to publish any information about the hotel on your website, but only use the hotel to add room allotment, you only need to **fill in the name under the header Hotel**. If you want to load a series you should also fill in the hotel code (see instruction load under travel administration). Then press update and you are finished.

You will be using the Content part of the system to add a new hotel. At the same time as you are adding a new hotel you can also add information in order to publish the hotel on your webpages. If you do not have Content management or do not want to publish information about the hotel on your webpage **it is enough to insert the name of the hotel and finish through the add button**.

The Hotel function in Content management is also used by the booking system to insert the name of the Hotel. To build a webpage for a hotel you will do as follows. Please note that if you are using hotel **attributes** (table with information about the hotel i.e. swimming pool etc) you have to enter these in the function attributes (see separate instruction attributes/content management) and might need adoptions of your design templates to have any effect.

Note. Many functions described below are used depending on the setup of the system. Functions are described in general and the usage depends partly on web design and specific client configurations. Read i carefully before start entering hotels.

Start the build up by pushing the link **add new hotel**.

1. You insert the name of the hotel for the booking system. You will only fill in the name of the hotel if you are using it for booking purposes only.

Hotel code. This is used when loading series of projects in the booking system. A hotel code should be short but recognizable. For usage in the bookingsystem see instructions (load projects/travel administration).

Product code. This is used for operators selling multiple hotel alternatives at a destination. The product code will then enable an easy way to take out rooming lists for all hotels in one specific destination where you have entered the same code. The code is also used in some content solutions.

Hotel address. Enter the address and it will be shown on the page (location depending on design).

Active. For the document to be published on your website it needs to be active. Inactivate the document by unticking the checkbox. Inactive hotels will still be valid in tours, but you cannot select it for new room allotment.

Hierarchy in menu. If you want a certain hierarchy on your webpage you can use this function. If you do not enter a number the system will place the page you're currently building as the last page entered. Lower figures will be displayed above higher figures.

Project. Used by companies using group functions. By connecting a project and a password to this webpage you have created a page that only can be accessed by those persons entering the password. A group can book their tour on this webpage without allowing other people to do the same.

Hotel attributes. If you are using attributes you will fill in the information here, see separate section about attributes.

Password. See above.

Hotel classification. Used to define a classification of each hotel. The classification can appear as stars or any other symbol of your choosing.

Categories. The categories that you have chosen to publish is shown here. You can choose one or more categories to the same hotel.

Properties

Supplier. You can connect the hotel to a certain supplier. This function is used by operators that are sending hotel requests to suppliers. It can also be used to give suppliers access to room list and room allotment. For operators using multiple suppliers to the same hotel you will connect a certain time period with a supplier (do not connect the supplier here) when setting up room allotment. To read instructions please see add room allotment/travel administration.

City. Used by operators selling hotels in dynamic booking. If you choose a city, the hotel will only appear if you choose this particular city in the booking process. To add cities to the system please see instructions in price database/travel administration.

Extra text. This is used to display extra text information on the webpage for the hotel. Extra text can be used for highlighting information or as **please note** information. Location of extra text depends on web design and if activated.

Hotel attributes. If you are using attributes you will fill in the information here, see separate section about attributes.

Main picture. Normally used to display the main picture on the top of the webpage. Select a picture in the scrollbar.

More pictures. Here you can connect an entire folder for slide show presentation. The location on the webpage is decided by design.

Picture slide show. You can create a slide show by using this function. The first step will be to create a folder (see instructions in pictures). The folder contains the pictures you will use for the slide show. Select a folder in the scrollbar. The slide show is presented on the webpage with a symbol (camera). The client will push the camera in order to see the pictures.

Text 1. This is where you add text to the webpage. You have an editor at the top of the text area.

Editor. Hold the cursor on each function in order to see the text with the description.

Room type

Enter the different kind of room types that you want to add allotment to. A room type can be a single room, double etc. Extra beds and empty beds are set where you enter allotment.

Room type local text. Insert the name of the room in your own language.

Room type in English, Spanish, German, French. If a name is inserted this will be used by the system on room lists etc.

Suffix for room type. You can add a suffix to the room name here (example with balcony, with sea view etc)

Number of travelers/room. The nominal number of travelers that the room can take. For a double room you will enter 2. Extra beds are added when adding allotment to a room type. Please observe that a room type such as a double room can be made as a single, three bedded and a four bedded room by adding extra beds or use the double room as a single room. You will find information on how this is done in the help function "add room allotment"

Active. You can inactivate a room type by unticking this box.

Room sold as a unit. This function is used when you are selling a room or an apartment as a unit with a price per night and unit. By adding the number of maximum persons the system will automatically calculate the room/apartment price per night and divide that with the number of persons booking.

Special function. Please note that with the Travelize system you can use a double room as a single room, double with one or more extra beds without adding a room type here. A normal situation is that a double room can be used as a single or with one or more extra beds. This goes for other room types as well. If you are uncertain how this works please contact Travelize support.

Add room allotment

Blue colored field/hotel can ONLY be used to get information if you already have added an allotment to a hotel before. If you want to add an allotment to a hotel for the first time you will find the hotel in the box BELOW the blue colored field.

Hotel. Search for the hotel that you want to add an allotment to.

Room type. Choose the room type that you want to add an allotment to.

Period. Use from and to to insert the dates that you want to build up a allotment for. You can add an allotment for a longer period and afterwards overwrite a shorter period (example of low and high season prices)

Release period. If you are working with release periods you can add a number here (30 for 30 days release). The release date will close down your allotment and close sales. NB, release needs to be activated by Travelize support.

Allotment room. Add the number of rooms you will build up an allotment for.

Allotment extra bed. You enter the number of rooms you can sell with 1, 2, 3 and 4 extra beds. -1 means stop sale, set this if you do not sell 3 extra beds/room for example. 0 means on request, if you allow waiting list/request. Instead of building up more room types you can use one room type and add 1 or 2 extra beds. This means that you are using the same room allotment as you have entered for the room type and the system will keep track of and calculate down the taken rooms.

Allotment empty bed. The same as above, for empty beds.

Surcharge for this room per person & night. You will use ONE room type as your standard room when pricing the package. A room that are more expensive or cheaper needs to have a price addition. You can choose to add the surcharge/discount here (note that the surcharge/discount is per person/night) or you can insert the total amount on the project. You can only use surcharge in total on the project if you are using double room with empty bed. If you have proper single rooms you have to add the room addition here.

Surcharge for this room per room & night. If you have chosen a room type that will be priced per room & night you will add the cost for the room/apartment per night here. Notice, the room type should be set up as an apartment/room sold as unit for this to work correctly.

Calculation part. (prices dor dynamics are set here).

Currency. The currency used is the currency that you will pay the rooms for.

Supplier. Choose supplier in order to connect the cost to a specific supplier. If you have connected the supplier to the hotel, you do not need to do this here as well.

Room. Use either cost per room & night or cost per person & night. You can add a surcharge to the cost for price calculation purpose. Push calculate to get the price. **To publish prices for hotel only, you need to be sure that there is a sum in the field ind. price**.

Empty bed. Regardless if you use the calculations or not you NEED to fill in a cost for an empty bed if you have added allotment to this field above. Don't forget to PUSH calculate so that the cost appears in the field marked PRICE.

Extra bed discount. Same as above.

Special function. If you have the waiting list function enabled all choices with 0 or more in allotment will be visible in the booking engine step 2. To avoid room options to be displayed you can insert -1 (equal to stop sale). Several options are already set as -1 as default.

Amend room allotment/inventory

Choose hotel and push get.
Choose period and push get.

Do your changes and push update. Changes that causes over bookings will result in warnings.

Amend room allotment 2

Amend room allotment 2 will show you a total overview of room types with allotment during a specific period of time. This overview is preferred when you have several room types and want to see those during a specific time period.

Search for a hotel by adding the name in the search field or simply press search to get all hotels.

Add a from and to date to get the overview.

You will now see the room types with allotment and if you want to amend please click on the roomtype. The usual amend room type frame will appear. Amend and update as normal.

The date period you have entered will show all room types with allotment even if they start and finish outside your chosen period of time.

Update room allotment on a daily basis

This function allows you to amend information for the room allotment on specific dates. **Please note that if you change the information in the complete date band after you have changed anything on a particular date through this function, the new general information from the date band will prevail.**

Search for the hotel and click Get. You will see a list of the room types available for the hotel. Move all or partial room type(s) to the selected box.

State the period you would like to amend. And the information you would like to amend.

You can either amend the values relatively to the existing, or add a completely new value.

You do not have to write any changed information - you can always manually change all boxes in the next step before confirming the changes.

Guarantee allotment

If guarantee is given for hotel or transport allotments, this can be stated on room allotment respectively on the transports.

The report Guarantee allotment enables searching of guarantee allotment for hotel and transport during a certain period of time.

If only "open balances" are included, the ones where the number of booked ones are at least as many as guaranteed allotments, are listed.

Set stop sale on an entire hotel

This function set stop sale on an entire hotel in a given period.

There are two ways you can set the stop sale, either by setting the allocation to number of sold, or by setting the allocation to -1. In the first case, you will be able to sell a room already booked if cancelled.

Please note that if you update a room allotment through the initial set date bands, this will override the daily updates you have done through this function.

Board

Board can be added with a function under Travel Administration / Add/amend travel arrangements.
In the hotel section there is Add board and Amend board. Search for the hotel this will apply to. Board is always stated for certain travel durations and is priced for that duration.
When booking, the board options with duration +-2 days will be shown.
An included board option should always be set to price 0.
You can add additions and also deductions to relinquish e.g. an included standard board.

State the board in the sales language, the way you want it to be seen by the customer. Also state international text, which will be understood by the hotels. This will appear on the room list in comments, where it says how many of each board there are on a booking. To and From date can be left empty, this will make this board option available during an unlimited period on the hotel. State From and To date if this option/price only will apply to a finite period.

Below the difference between a la carte and package trips concerning boards are described.

Package trips
When booking, the board options with duration +- 2 days will be shown. If there are no available dates stated and the duration is 0 then this option always will be showed on the chosen hotel. If you choose duration 1 and the trip is between the stated dates on the price option, then this option will be enabled on the package with the difference that it then will be a day price. Usually with durations not being 0, the price refers to the whole period, but if the duration is set to 1 then the price will be a day price.

If you use the a la carte module the options with duration 1 is visible there too.

A la carte trips
When booking the board, options with duration 1 will be visible. A la carte boards is explained with the following example:

In a hotel you can set a base price option for a board, let's say lunch. A good idea is to set the base price for a very long period of time, it's possible to update the price whenever needed.

I add lunch from today's date up to year 2010, I set the base price to 200 SEK per day. Now I want one day during the price period to cost a little more (e.g. Christmas Eve), then I add a new price period with duration 1, I set the date from 24/12 to 24/12 (1 day). I set the price to 400 SEK. If a customer makes a booking, after this is set, from 20/12 to 25/12 (5 days), the price will then be 4 x 200 + 1 x 400. Now I want to state that the lunch is free 10/12 and 20/12. Then I create a new price option for the board lunch. I set the dates and set the price to 0. When a new customer makes a booking from 15/12 to 25/12 (10 days) the price will be 79 SEK (79,6 SEK to be exact) a day and it will say 4 x 200 + 6 x 66 on the booking. This may look a bit strange, so let's explain it: 4 x 200 may not be so strange. The remaining days (6 days) the price is 0 SEK on 5 of them (15-16/12) and 400 SEK on 1 (24/12). 6 days that has a total cost of 400 SEK, that makes the day price for these 6 days 66 SEK (66.66 SEK to be exact). The reason that it's shown in this way is that the text could be very long (say that you have 6 different price options during a period, then it could look something like this for the customer: 1x100 + 2x250 + 1x125 + 23x100 + 3x0 + 5x750). There is a restriction to considerate. For each day it should not be more than 2 (two) prices on each board; the base price and the modified price (10/12-20/12 and 24/12) in the example above. Let's say that there are three price levels for lunch 12/12, then we can't guarantee that the right price will be set that day. For example 12/12 we have base price 100 SEK, we also set a price of 0 SEK and one of 200 SEK. Besides there is no reason to have three different prices in one day for one board option.

Search for/administer boarding options for hotels

In this function two text boxes appear. Hotel ID is automatically created. To list all boarding options in all hotels leave both boxes empty. Then only press the Search button.
To search for a specific hotel search on the basis of either the hotel ID or it's name. When having filled any of the boxes, press Search to show results.

Administer board options

Add board
For every hotel in the list there is a link named "Add new". If you press this you will add a new board option for the marked hotel. If there are existing board options they are listed with bold font as sub headers under each hotel. To the right of the option name there is a link named:

Add new price period
Choose a hotel and press the link "Add new period" to add a new period on an already existing board. A board option can have an unlimited amount of price periods.

Change price period
To change a price period, press the line containing the price period.

Here below the search results for hotels and boards are listed. For each hotel listed is a link named "Add new". If you press this you will add a new board option for the hotel. If there are existing board options they are listed in bold font as sub headers under each hotel, the options are listed in their local names. To the right of the option name there is a link named "Add new period", press this to add a new price period for this option at this hotel. A board option may have an unlimited amount of price periods. To change price period you press the line containing the price period.

Below the difference between a la carte and package trips concerning boards are described.

Package tours
When booking, the board options with duration +- 2 days will be shown. If there are no available dates stated and the duration is 0 then this option always will be showed on the chosen hotel. If you choose duration 1 and the trip is between the stated dates on the price option, then this option will be enabled on the package with the difference that it then will be a day price. Usually with durations not being 0, the price refers to the whole period, but if the duration is set to 1 then the price will be a day price.
If you use the a la carte module the options with duration 1 is visible there too.

A la carte / dynamic booking
When booking the board, options with duration 1 will be visible. A la carte boards is

explained with the following example:

In a hotel you can set a base price option for a board, let's say lunch. A good idea is to set the base price for a very long period of time, it's possible to update the price whenever needed.

I add lunch from today's date up to year 2010, I set the base price to 200 SEK per day. Now I want one day during the price period to cost a little more (e.g. Christmas Eve), then I add a new price period with duration 1, I set the date from 24/12 to 24/12 (1 day). I set the price to 400 SEK. If a customer makes a booking, after this is set, from 20/12 to 25/12 (5 days), the price will then be 4 x 200 + 1 x 400. Now I want to state that the lunch is free 10/12 and 20/12. Then I create a new price option for the board lunch. I set the dates and set the price to 0. When a new customer makes a booking from 15/12 to 25/12 (10 days) the price will be 79 SEK (79,6 SEK to be exact) a day and it will say 4 x 200 + 6 x 66 on the booking. This may look a bit strange, so let's explain it: 4 x 200 may not be so strange. The remaining days (6 days) the price is 0 SEK on 5 of them (15-16/12) and 400 SEK on 1 (24/12). 6 days that has a total cost of 400 SEK, that makes the day price for these 6 days 66 SEK (66.66 SEK to be exact). The reason that it's shown in this way is that the text could be very long (say that you have 6 different price options during a period, then it could look something like this for the customer: 1x100 + 2x250 + 1x125 + 23x100 + 3x0 + 5x750). There is a restriction to considerate. For each day it should not be more than 2 (two) prices on each board; the base price and the modified price (10/12-20/12 and 24/12) in the example above. Let's say that there are three price levels for lunch 12/12, then we can't guarantee that the right price will be set that day. For example 12/12 we have base price 100 SEK, we also set a price of 0 SEK and one of 200 SEK. Besides there is no reason to have three different prices in one day for one board option.

Package

The package functions are where you will create your packages. Project is in many cases synonym to package.

To build and load a package all the underlying components must be in place (hotel, room allotment, transport etc).

The following procedure is used to build a package:

Copy. You can copy an existing package. If you know the name of the package you want to copy, write and push search. If you want to see all packages leave the field empty and push search. Mark the package that you want to copy and push copy.

If you want to build up a package from scratch please find explanations below:

Package code: Will identify the package. The code should include the components such as destination, period and hotel. Example Lon32maj could stand for London, week 32 and Hotel Majesty.

Name: The text that will appear in the booking (ex London Hotel Majesty). Do not enter a date as the system automatically inserts it.

Set the project code automatically. Used for project loads (see help manual for the load function).

Status: Open to book means open to all (external as well as internal). Internal (closed for external sales), Closed not possible to book for anyone.

Product: The package is connected to a product. A product can be connected to several packages.

Type: Package if you want to connect a hotel. The list can be customised.

The project is connected to the following components:

Transport Out (Departure): Select the outbound transport that you will connect to the package. Choose **no transport** if the package shall be bookable without a transport. If you have selected an outbound transport you also need to select an inbound transport.

Inbound: Same as above.

Select allotment based addition. Tick this box if you want to add additions (theater tickets or similar). By ticking additions will be mandatory in the booking engine. To add additions, you will have to create a package. Go to amend package to add additions.

Hotel: Select the hotel that you will use for this package. **Select none** if this is a project with transport only.

Select room type. This room type will be your standard room choice on this package. If more room types are connected to the hotel, they will appear when selecting this package in the booking engine.

Check-in and check-out. If check in and check out corresponds to your transport date (same check in and check out as the transports),then you do not need to insert dates. The system will take the transport dates. If check in is 1,2 or 3 days later the change the number in the box with the arrow. Same for check out. The system will change check in and check out according to your choice.

Package start: You do not need to enter a package start date if this is the same as the transport (start of the package). If you do not have a transport (lodging only) the check-in date will be taken as package start date.

Package start (hh:mm). Some packages can be activities where not only the start day is important but also the time of the day is relevant.

Duration. Used for activities with not transport or hotel connected to the package. To determine the total length of the package (ex 3 days), you have to add a value here.

Close sales externally: Days before departure that the project is closed for bookings externally (for end customers)

Close sales internally. Same as above but for internal bookings.

Account 1, 2 and 3. If you want to book keep packages with a certain revenue account number add the revenue account in account 1. Account 2 and 3 are used for more dimensions (department, company etc)

Allotment (pax):You can limit the allotment on the package as well. A limitation on the package can be used if you have transport only and want to limit the amount of only transport clients.
Example. You have 100 seats on the transport. 10 of those can be sold on transport only. You will create a separate package and limit the allotment to 10 on that package. 90 out of 100 will be sold as a package and a maximum of 10 for transport only.

Otherwise you normally set this allotment high (999) and let the resources be the limiting factors.

Price. The price of the package, only transport, only hotel.

Deposit. Add the amount that you would like to have as a deposit here.

Travel VAT. Choose VAT sum to make automatic calculation. For advanced VAT calculation see instructions in calculations.

Terms for child discount. Choose one of the rules designed for your company or leave empty. Rules are added by Travelize.

Maximum age for child discount. Add a number for the maximum age children discount. If you enter 12 it means that the child can not be older than 11 years and 364 days on the departure date to receive a discount.

Senior discount. Insert the discount.

Minimum age for senior discount. If you insert the value 65 as an example, travelers that are 65 and older will receive a discount.

Infant price. Total price for a project if booked as an infant. Infant is normally below 2 years old on the return date.

Package discount. A possibility to add a discount rule to this particular package.

Cancellation insurance. Add the price for the cancellation insurance. Tick the box if no cancellation insurance is sold on this package (normally if included in the price).

Choose priority for special offer. If you want to change the package into an offer (displayed as an offer on your homepage) please add a number in this box.

Free text special offer. Add a text if needed to the package you will mark as an offer. (example price discounted!)

Travel insurance. Choose the insurance applicable for this package. If no travel insurance is soled tick no.

Terms of payment. These are normally the same for all packages and you do not need to insert this information each time. Used when other terms of payment than the normal ones will be used.

Commission. Use this for an automatic calculation of commissions when you are selling this package on commission.

Nationality, passport number, date of birth and send request. Tick yes or no to decide whether these fields will appear as compulsory.

Comments. Will appear in the booking.

Internal comments. Will only be displayed for logged in persons in the booking process.

Text on individual voucher. Enter a text to be displayed on all individual vouchers connected to this package.

Project overview

This report shows all projects in a chosen period of time. As a standard a project is shown for 60 days ahead. If date period is stated, projects in chosen date period is shown.

The list can be restricted to only contain projects which projectID contains everything stated in "limited search".

Further the list can be restricted to only show projects in a certain sale status. This is useful to control for example that no projects has incorrectly been set to internal.

From the list you can directly go to project update and detailed information about the limited invoices of the project, through the information link.

Status, stop sale, hotels, transports, duration, close sales internally and externally is listed in the report.

A maximum of 500 projects are shown at a time, if there are more projects you can reach them by clicking the link at the bottom.

Compiled project information

This function can be reached if you are logged in as admin. You find it in step 1 of the booking, at the information link, as well as from the report Project overview under Travel administration. It gives summarized information and direct links to transports, hotel etc connected.

If the project is connected to a hotel, you can also see all the room types available at that hotel during the time the project uses the hotel.

It also shows if the project is closed for sale due to any resource being closed to sale. Notice that this closed sale is not automatically deleted if the underlying resource is deleted, but this is done by pressing "remove stop sale" on the right of the red text saying it's stopped.

Notice that if you have removed stop sale and you are in reservation step 1, you have to update the list of trips to be able to book.

At the bottom is Update project, causing recount of all resources involved in the project. This may take a while and is only used if at any occasion an error has occurred and not all resources have been updated, or if you want to remove sale stop status on the project.

Load packages

Before starting to load packages please also read general instructions for packages.

You will use the same method as when you load a single package. The main difference is that you will create a series of packages when using this function.

Important information

If the package that you want to load contains a hotel please check that you have entered a hotel code. The hotel code will be part of the package code and if you are loading many different packages this helps you find specific packages much easier. Find information about hotel code in Content Management/add new hotel.

You can also use this function to calculate prices and set prices on all packages loaded. An automatic price calculation can only be done if you have inserted costs in the calculation part of each component (transport, hotel etc). For instructions se add room allotment, add transports.

Loading instructions

You always start with the first package in the series. All components such as transports, hotel allotment etc needs to be loaded for the whole package series before you load the packages.

To build and load a package all the underlying components must be in place.

The following procedure is used to build a package:

Copy. You can copy an existing package. If you know the name of the package you want to copy, write and push search. If you want to see all packages leave the field empty and push search. Mark the package that you want to copy and push copy.

If you want to build up a package from scratch please find explanations below:

Package code: Will identify the package. The code should include the components such as destination, period and hotel. Example Lon32maj stands for London, week 32 and Hotel Majesty.

Name: The text that will appear in the booking (ex London Hotel Majesty). Do not enter a date as the system automatically inserts it.

Status: Open to book means open to all (external as well as internal). Internal (closed for external sales), Closed not possible to book for anyone.

Product: The project is connected to a product. A product can be connected to several packages.

Type: Package if you want to connect a hotel. Only transport if you will not include lodging.

The package is connected to the following components:

Transport Out (Departure): Select the outbound transport that you will connect to the package. Choose **no transport** if the package shall be bookable without a transport. If you have selected an outbound transport you also need to select an inbound transport.

Inbound: Same as above.

Hotel: Select the hotel that you will use for this package. **Push none** if this is a package with transport only.

Get hotel rooms. Push the link to get a choice of room types. When you push the link the system will refresh the page and you will see red warning texts on the document. This is normal as you will need to fill out some of the fields to be able to load a series. Select the room type that will be the standard room type on this package.

Suffix to project code. Add a suffix to identify projects with different lengths. One week = 1w, two weeks = 2w etc.

Check-in and check-out. If check in and check out corresponds to your transport date (same check in and check out as the transports) then you do not need to insert dates. The system will take the transport dates. If check in is 1,2 or 3 days later the change the number in the box with the arrow. Same for check out. The system will change check in and check out according to your choice.

Package start. Insert the outbound transport date.

Latest departure date for package load. Take the last outbound transport date and insert it here. Packages will be loaded including this transport.

Markup on transports. Used if you want to add a mark up on the transport cost. Leave with 0 if you are not using it.

Addition. Enter the price of the package here. Also used when loading packages where costs are calculated together. The addition is then your mark up.

Deposit in %. The deposit is calculated as a percentage of the total sum. Leave empty if fixed deposit amount is used.

Close sales externally: Days before departure that the package is closed for bookings externally (for end customers)

Close sales internally. Same as above but for internal bookings.

Account 1,2, and 3. If you want to book keep packages with a certain revenue account number add the revenue account in account 1. Account 2 and 3 are used for more dimensions (department, company etc)

Allotment: You can limit the allotment on the packages as well. A limitation on the package can be used if you have transport only and want to limit the amount of only transport clients.
Example. You have 100 seats on the transport. 10 of those can be sold on transport only. You will create a separate package and limit the allotment to 10 on that project. 90 out of 100 will be sold as a package and a maximum of 10 for transport only.

Travel VAT. Choose VAT sum to make automatic calculation. For advanced VAT calculation see instructions in calculations.

Deposit. Add the amount that you would like to have as a deposit here.

Round number of decimals. Use this to round the price calculation.

Extra bed discount. The total amount of discount for extra beds per person is added here. Can only be used in connection with double room allotment. For further instructions see add room allotment.

Terms for child discount. Choose one of the rules designed for your company or leave empty. Rules are added by Travelize.

Maximum age for child discount. Add a number for the maximum age children discount. If you add 12 it means that the child can not be older than 11 years and 364 days to receive a discount.

Infant price. Total price for a package if booked as an infant.

Package discount. A possibility to add a discount to this particular package.

Empty bed surcharge. The total amount in surcharge for an empty bed. Can only be used in connection with double room allotment. For further instructions see add room allotment.

Cancellation insurance. Add the price for the cancellation insurance. Tick the box if no cancellation insurance is sold on this package (normally if included in the price).

Choose priority for special offer. If you want to change the package into an offer (displayed as an offer on your homepage) please add a number in this box. Two packages can not have the same number (ex number 1).

Travel insurance. Choose the insurance applicable for this package. If no travel insurance is soled tick no.

Terms of payment. These are normally the same for all package and you do not need to insert this information each time. Used when other terms of payment than the normal ones will be used.

Commission. Use this for an automatic calculation of commissions when you are selling this project on commission.

Nationality, passport number, date of birth and send request. Tick yes or no to decide whether these fields will appear as compulsory.

Free text special offer. Add a text if needed to the package you will mark as an offer. (example price discounted!)

Comments. Will appear in the booking.

Text on individual voucher. Enter a text to be displayed on all individual vouchers connected to this package.

Click on add to save this project.

Update package

The update package function makes it easy to update a single project or many projects at the same time. You can update project price, children discounts, empty bed surcharge, extra bed discounts, cancellation insurance etc.

Project. Insert the project ID for updating a single project. To update a series of projects do as follows:

Use the % to include projects with different dates. Example:
A project series to Palma and a specific hotel Grand is named Pal2008gra (Palma 20/8 grand hotel). To include all projects to Palma and the hotel Grand please enter Pal%gra.

Prices can be amended in different ways:

Amount to change with. Use this when you want to increase or reduce a price with a certain amount (20 to increase the price with 20 or -30 to decrease the price with 30).

Enter a completely new value. Use this if you want to insert a totally new price (change price from 395 to 295. Insert 295).

Children discounts. You have three different options to amend children discounts.

Amount to change with. See above.

Enter a completely new value. See above

Calculate as flat rate. Insert the price that a child will get on this project (price on project 695 and children pays 299. Enter 299 and this will overrule all other prices).

Package name. You can change name of the project/s.

Allotment. Amend allotment on your packages.

Comments. Amend comments on your packages.

Cancellation insurance and deposit. Amend these by inserting a new value.

Close sales external and internal. Insert new values to change settings.

Choose priority for special offer. A single project or a series of projects can be set as special offer.

Special child prices, separate prices with semicolon (e.g. 1190;2550). Combinations of child discounts with different age limits.

Status. A normal way of working would be to load the system with packages before you start you selling season. When loading packages you can choose status internal or closed and when you want to release them on the Internet, use this function to change status to "open for all".

Terms for child discount. When you want to amend child discount rules.

From and until. If you want to update a date interval insert from and until dates.

Amend dates. Amend check-in or check out dates as well as package start date.

Week days. If you want a package series to start at certain week days.

Push amend to update.

Your amendments will now be displayed and you can do corrections if necessary before pushing update to confirm amendments.

Additions, without allotment

A choice can be an activity or a choice that can be selected in combination with a purchase of a room (half board, spa treatments etc)
If you have many different types of choices you can divide them into different types (Hotel, other, spa etc). If you want to do this, then start with adding types (see type references/price table). To add a choice please proceed as follows:

Type. Choose a type for your choice.

Name. Add a name of the activity.

International text. The name of the activity in the language of the supplier or if preferred in English.

Description. Text to describe the activity/choice.

Picture. You can add a picture to your text to make a nice presentation. The picture will be minimized to fit into the booking frame.

Image path/search

Show in order. Will only by used for choices connected to the package booking.

Item sales. Check this if number or items should be selected when making the reservation.

Duration sales. If an activity have a specific duration (2 days) please add the number of days here. If the activity has duration in hours please add here. Important if you have several activities during one day.

Active. Choose yes to activate.

The activity is now saved and you will continue to the next step and add a price.

Find the activity and select choose. To the right you will find add price. Push add price.

The following information needs to be added:

Price. The price of the activity (per person)

From and until date. The date period where this price will be valid.

Cost. Your purchase cost.

Currency. Your purchase currency.

Revenue and cost account. Select if you are using different accounts.

Supplier. Choose supplier to activate request mail function.

Status. Only free sales is activated. Other options will come later.

Start time and end time. Add hours to be able to add several activities during one day. The system will check start times to avoid a client from booking activities that starts at the same time.

Shortest duration and longest duration. Not used.

Active. Set yes to active to allow sales of addition.

Cabins

Cabin types are normally different from ferry line to ferry/cruise line. You have therefore a possibility to connect a cabin type to a ferry/cruise line supplier. When adding cabin allotment to a cabin type it will then be possible to search for a specific supplier and receive a list of all cabin types used by this ferry/cruise line.

This is how you enter cabin types into the system.

Name. Give the cabin type a name. This name will be displayed in the booking engine. A potential client shall be able to figure out what cabin to book.

International text. Used by operators where the mother language is not English.

Number spots. The number of persons/beds that can sleep in this cabin, cannot be 0. A cabin can be configured as a shared cabin (see instructions cabin allotment).

Supplier. Choose a supplier if you want to sort cabin types by supplier. Choose none to avoid a supplier connection.

Amend cabins

Get the cabin type that you want to amend.

Do your changes and push update to save changes.

A cabin type with bookings connected to it can not be changed in relation to number of persons in the cabin.

Ferry

Here you can add ferries and connect them to transports. When you have added a ferry you have to connect one or more cabins to the ferry to be able to connect it to transports.
Click the link Add new to add new cabins to the ferry.
Then to connect transports you choose transports from the left field and click them to move them to the right field, and vice versa to delete the connection.

Brochure administration

Brochures

With this function you can add new brochures (for selection in the order brochure function on your webpage). The name of the brochure will also appear on each client document. Use this to print labels when existing clients wants to have a brochure.

To add a new brochure:

Name. Insert the name of the brochure (example winter program, summer program etc).

Short name. Used to mark up labels(example Su for summer). You can also select labels for each brochure category when printing labels.

Picture. If you wish you can also insert a picture together with the name.

Free text. You can insert a short text to give a description (New this year - Croatia!).

Pre selected. If yes the box will be checked and the customer has to deselect it to not order the brochure.

Amend brochure

Amend information and confirm

New brochure orders

All orders for brochures will be stored in the customer database.

You have two choices to handle new orders:
1. Print them onto labels. Choose the number that is corresponding to the sort of labels you are using.

2. Export address information to Word and make the required connected letters. Please contact Travelize support if you would like to use this option.

To use this function:

Type. Select the type of label you will print your addresses on. Label types are normally marked with a number (ex 3241). Check with your supplier if you do not find the number.

Pages for print. If you want to print all your brochure orders this function indicates on how many pages. Please observe that when selecting one brochure type pages for print will not indicate.

Brochure orders. All your brochure types will be screened. Tick the box/boxes to print.

Write to file. Tick this box if you want to merge your letters. Merging letters means that you will receive a file with the addresses.

Press Confirm.

The addresses will then appear and they are also marked if you are using short names when adding brochures (see instructions add new brochure).

Print and do not confirm until you are sure that all labels where printed correctly.

Export labels

You can use the system to print labels for marketing activities.
If you want to extract labels for the main part of your client database please contact Travelize support for help. We will help you create a file.

If you have the marketing module you have the possibility to create customer categories. You can use that function to extract labels for a specific group of clients.

Go to amend/add client and select a category. Depending on the size of the file it will take some time to create the list. When the list is loaded scroll down to the last name and push the blue link. Follow the instructions.

You can also use this function to select a customer group within a certain postal area. Insert the postal code and push continue. All clients within that area will appear.

Many customer databases include doubles. You should clean the database from doubles once a year. Contact Travelize support to help you.

Print labels

You can print labels from your new brochure orders. Choose the label format that you want to use. See also instructions in **new brochure orders**.

Revert confirmed brochure orders to not printed

You can use this function if you by mistake has confirmed and changed status when printing labels for brochures.

Insert the date that you want to reverse brochure orders and push update.

Revert confirmed brochure orders to not printed

You can use this function if you by mistake has confirmed and changed status when printing labels for brochures.

Insert the date that you want to reverse brochure orders and push update.

Booking internal

Order

You choose the number of adults, children and infants to be booked into one room and/or an activity. Choose the number of days for the booking and then choose arrival date. You can use the calendar function.

You can search downwards from country, destination and to hotel or you go directly to the hotel or the activity. If you have connected activities directly against a destination, then they are always listed together with the chosen hotel.

The booking works like a shopping cart where you put everything you want to book in the cart. When ready press Confirm cart. You will then get to the section where to fill in personal information.

When logged in as administrator you can get the customer from the customer data base. When ready, the booking will be registered as a new alternatively request that is sent to the supplier.

Booking step 1

You have several choices to see all bookable tours:

1.Destination: If you choose all, all tours will be shown
2.Departure from: You can choose a start date and tours from that date will be displayed.
3.Show number/page: This depicts the number of tours per page that will be displayed.
4.Search by Web code: Use the project code per tour and you will be shown the tour you have selected.

Choose continue after you have made your choice.

To book the tour and continue to the next step please push book now!

Booking step 2

The choices you made in step 1 are automatically transferred to step 2.If you have not entered the number of travelers in step 1 you have to do it here. You can of course also change the number of travelers in step 2. If you do so, you will also get a new choice of rooms available for the number of travellers you have chosen.

Choose the specific room options that fit the respective number of travelers. If you want to have more combinations please push "show more room alternatives".

Free text: These functions will only be displayed for internal users and will give you additional options to provide discounts, surcharges etc that are not included in the basic price.

Special departure point: You have the option to inserting a different departure point for your client in the field provided. If you do so PLEASE REMEMBER that this is not included in your schedule for departure cities. In step 3 when you choose your departure city you have to choose the departure city that comes prior to the differing place of departure that you have chosen. The differing place of departure will now be inserted between the departure city you have chosen and the next to follow in your timetable. You do not add any departure time.

Preliminary booked: You have the option to book a traveler as preliminary. The system will automatically suggest a follow up date (8 days). You can change this date in the box where the date is displayed. Preliminary booked travelers will be displayed on your screen (when logged in) at the follow up date.

Information to a specific hotel: Information that you want to add to the rooming list will be written here.

Transport information.: Information that you want to add to the transportation list/passenger list will be written here.

Internal comments: This information will not be displayed on any list. It is for internal use only and will be connected to the client.
Continue to step 3.

Search/amend customers.

Use the search/amend customers to find a customer that already has been entered into the database. You can insert information in a single field or several to narrow down the result of the search. Push search to see the result of the search. If several options are presented, push select to connect a reservation with a customer in the database.

Booking step 3

Search/amend customer.

Fast track to find a customer.
Add a name, telephone number or whatever is available in the fields to search or amend information on a customer. The system will display customer/s that match what you have inserted. Choose the customer that fits your search and click on "choose". The customer information will automatically insert into the order fields. You can continue with your booking without searching for a customer by pushing the continue button. This will then take you directly to step 3.

A number of empty fields are displayed here. All fields marked with a red star are compulsory and need to be filled in. There are some fast functions that can be used in this step:
Please click here if the order person is the same as traveler No 1 ». The system copies the information you have entered in the order field "copy all choices to all travelers". The choices made for traveler 1 will be copied to all other travelers.

Departure city/connection homebound.
You can choose a departure city and a homebound connection. You can choose different cities for departure and homebound on all travelers if you wish. This information will be stored and displayed on transports lists

Booking step 4

In step 4 you will have a summary of all choices made. You can always return to previous pages by pushing back in the right corner.
You can also write info for the hotel and transport here.

When you have checked all information you end the booking by pushing confirm. Shortly after you will receive a booking number and a customer number. By clicking on the booking number you can go into the booking again and do changes if necessary.

Book driver/guide

To avoid that drivers and guides will be part of the booking statistics and also to make a fast and easy booking for this category do as follows:

Choose project by using search.

Choose room type and insert name and sex.

Continue.

Prices are set to 0.

A la carte booking / dynamic booking

The a la carte booking consists of transports and hotels. The clients will be able to book single and return flights as well as combinations of flight and hotel. In this function you will make it possible to book in the a la carte booking engine.

Name. Transports loaded in the system have uses your name coding system. For clients to recognize what they are supposed to book you will give the transport a name. A return flight from London to Paris can be named London - Paris - London or London/Paris return.

Transport 1. Transport 1 is the outbound transport in the system. Insert the main ID for the outbound transport. If you want to enter a single outbound flight you will use Transport 1 and skip transport 2.

Transport 2 . Transport 2 is the inbound transport. Insert the main ID. If you are entering a single transport inbound you will use this field and skip transport 1.

Product. A product must be connected and we recommend you to insert a product with general information.

Hotel compulsory. If a transport must be booked together with a hotel please tick yes here. No means that a transport only can be booked.

Max length. The maximum allowed length between the outbound and the inbound transport that can be booked.

VAT. ALC combinations (transport and lodging) can be VAT applicable. You have the option to set any VAT level here.

Travel length/duration.

Start week days.

Push add to save.

A la carte booking step 1

A la carte booking means that you're the one who decides which components the journey will contain.

Choose number of persons. You may also do this in step 2 when you are about to choose room.

Select type of journey. Choose journey/way of transportation.

If you have chosen transport return ticket you will now see 3 options
- Date of departure
- Date of arrival
- Hotel

Make choices which fits you. If you don't want hotel to be included chose alternative "only transport" under the headline "hotel".
If you have chosen an hotel, you will now receive day to check in and out. The date is already chosen to the corresponding departure and arrival date. If you want to change date you are able to do that in the in the fields or change the date in the calendar to the right of the fields. Choose date in the calendar and push the date to change.

If you would like to add yet another hotel, push "add hotel nr 2" and then repeat the process from above.

A la carte booking step 2

If you would like to change number of persons, going on the journey, do it now. Choice of room is based on the amount of persons and the program will suggest a room which will be suitable. Choose room and then press next.

A la carte booking step 3

Fields marked with a red star are mandatory and you must complete them. Choose if your confirmation will be sent to you by e-mail or regular mail. If you're able to supplements click in this field. Possible children discount will be counted after you have filled in their birth-date and will be presented in step 4. Press next.

A la carte booking step 4

In the last stage all fact about your booking will be presented. Possible children discounts will show in the price compilation.

Control all data. If you need to change anything you may always return to the previous page by pressing "back".

If you're satisfied, press "confirm". Not until now will your reservation be booked in the database.

If you have chosen confirmation via e-mail, you will receive a confirmation letter shortly after pressing "confirm". If you have chosen regular mail it will arrive in time.

Agents

Agents

1. Company name. The name of the agent you wish to enter.
2. Code. Each agent must have an unique code. A code can be numerical or alphabetical. You need to enter at least two digits. The code identifies each agent.
3. Commission in %. If the commmission is a percentage of what they are selling, please ad a number here (e.g. 8 = 8% commission).
4. Commission fixed amount/booking. If each booking renders a fixed amount please add it here (e.g. 20 euro per boooking)
5. Agent invoice or client invoice. Agent invoice is used when the agent will recieve the invoice from you with the commission deducted. The system produces an invoice where the amount is less commission (net amount invoice. A client invoice means an ordinary invoice to the end user. The system keeps track of revenue posted to the specific agent and produces an agent commission amount (commission payable to the agent).
6. Due date payments agent invoice. You can decide whether the agent shall have special payment instructions. Add 0 if no special payment instruction is neccessary.
7. Access levels for agents. You have different options if you want to grant the agent higher access to the system. If you do not tick any box the agent can make a reservation with very limited possibilites to amend the reservation.
- Access to the entire customer database. The agent will see all your customers and will be able to amend the same.
- Allow agent to make a reservation with admin rights. This access level is the same as a system user set as active. The agent will be able to amend reservations, cancel etc.
- The agent is allowed to cancel bookings.
- Allow agents to view preliminary bookings.
- No access to print reservation confirmations.

The boxes can be combined with each other. If you do not tick any box an agent will have the same access as a normal web customer.

8. Categories. This function is for the time being not in use in the system.

9. Active. By ticking the box the agent is active in the system. If not ticked the agent will recieve the status INACTIVE.

10. Newsletter. This function can only be used if you are licensed for the sales module. This will give you the possibility to send out newsletter to agents only or in combination with other groups (customers, suppliers etc).

Check details and continue by clicking add. The agent has now been added to your agent database. You can now continue to insert users. Click on add to enter details about an agent user. Fill in information about the user including e-mail address and username. Click on add. An e-mail is now sent to the user with his/her username and a password. The password can

be changed by the user after logging in for the first time.
If you have more users to enter, continue by repeating this process.

Amend agents

Here you may make any amendments and update the information by pushing update.

Show all agents

Show all. You will see all agents that has been added to the database. If you want to sort agents in various ways, click on the header (company name, telephone etc).

Agents.txt. By clicking this link you will receive a text file with all agents (name, address etc). You can use this text file to merge letters in Word and similar.

Report of agent invoices

The report is selected by reservation date or day of departure. It is possible to indicate the date in open intervals, by leaving the first or last date from or up to a certain date. The list will show all the agent reservations with agent invoice. To see all the agent reservations you will need to access through each respective agent. To access the list it's demanded that the user has Economy eligibility, because it will show that he or she has compilation over agent commissions and booking values.

Invoicing

You have two possibilities regarding invoicing reservations from agents:

Agent invoice. The reservation is made into your system, the agent invoices his client directly. Or, you invoice the agent. The system will create a "net invoice" where commissions are deducted from the total client amount.

Client invoice. The reservation is made into your system and you invoice the end user. Each reservation made by the agent renders a commission amount (see agent reconciliation).

Log in message to agents

Here you may add a message to your agent website. This message will appear when agents log in. The message is always the same for all agents.

Agent reconciliation

Agent reconciliation helps you calculate agent commissions.
Start by choosing the time for your reconciliation and push continue.
Reservations that have been made by agents and where payment has been received are

ready for reconciliation. Reservations ready for reconciliation are ticked.
Reservations where payment has not been received or where the amount paid in is less than the total revenue will need your attention. You can choose to enter them by ticking the checkbox. Those reservations that are not ticked will not be entered and will appear in the list again.
You have some options to calculate the commission:
- Calculate agent commission on total cost. All post will be included in the commission calculation.
-Calculate agent commission on base price only less child discounts and room type adjustments. By ticking here child discounts and single bed supplement will be deducted from the commission calculation.
-Base price + cancellation fee - children discount - extra bed discount - other discounts - Travel VAT. Also cancellation fee and VAT will be deducted.
- Basic fee less child discounts.

Address. Choose left or right justify for the agent address.

Include header. Your logo and address will appear on the reconciliation.

When you have selected bookings for reconciliation please click on **continue**.

In the next step bookings are shown summarized per agent.
Print this list before confirming.

By pushing confirm you have marked this booking as reconsolidated and they will no longer appear on any list.

Add commission category

With help from commission categories on the agents it is possible to have different commission conditions on various package tours. For this it is possible to add commission categories for optional terms for example A, B, C etc. on the agents and with following terms of commission concerning this category. Later on the projects you indicate to which category it belongs. If the project is suitable to an agent category for an agent at an agent booking, you will use the indicated commission for that category otherwise you use the general commission indicated on the agent.

Suppliers

Supplier

Here you can register a supplier in the supplier register. The fields are not mandatory so you can choose which fields you wish to fill in.

Supplier are used to tie resources up in the system to be able to send requests, get statistics per supplier, and give the supplier access to some parts of the system for its own resources.

Amend supplier

In this function you can amend the details, such as address, e-mail and similar for the supplier.

You can amend supplier information at any time. After amending information push continue to save.

Amend supplier

In this function you can amend the details, such as address, e-mail and similar for the supplier.

You can amend supplier information at any time. After amending information push continue to save.

show all

If you want to see all your suppliers please select this function

Register supplier invoice

This function registers the supplier invoice into the system and makes it available on the different reports connected to creditors account in the system.

Register supplier invoice

Travelize presently supports supplier invoice control for hotels only.
Invoice control functions checks calculated costs of room cost x nights versus the registered amount of the supplier invoice. See also instructions add room allotment/travel administration.

To register a supplier invoice or invoices:

Number of rows. Insert the number of rows you will need to register supplier invoices. You will ask your supplier to insert the booking number for each post and therefore one invoice can consist of several rows. For the supplier invoice control to function each booking number needs to be matched.

Supplier. Select a supplier.

Date. Today's date is pre selected. Change if necessary.

Total amount. Insert the total amount (all rows) that you want to register.

Reference. If you want to register a reference add it here.

Currency. Choose the currency of the supplier invoice.

Booking number and amount per booking. For the system to be able to check calculated costs versus actual.

Push continue

You will now see a list of the transactions you have registered. The system now compares the registered amount with the calculated. Differences are written in red text. Place the cursor over the info text to see how the sum was calculated.

Push confirm to register.

Search supplier invoice

Search for a supplier invoice. All fields are searchable.

Show all suppliers

This function gives a list of all your suppliers with some basic information. The information is also included in an Excel list at the bottom of the page. You can use this Excel spreadsheet to create merged letters in Word to send to your suppliers. Please refer to Word help for yow to create merged letters.

Supplier liabilities per chosen date

This report shows supplier invoices which have stated invoice date up to stated date where paid balance is different from 0.

The report shows information about supplier invoices and the amount given in the currency of the supplier, paid in the currency of the supplier, the remainder to pay in the currency of the supplier and the remainder to pay in your local currency.

Supplier statistics

This report shows bookings within stated date intervals (a maximum of 5000 lines are shown in the report).
You can search by reservation date and or departure date in open intervals. It's enough to state a From date to show all bookings after that date, or a To date to show all bookings before that date.

It's possible to search for a certain supplier and to state that only active reservations will be included.

Supplier is shown if there is a link to transport (only the supplier of the first transport is shown in the report), hotel or order line at invoice.
At project reservation or A la carte reservation when both transport and hotel is linked to supplier two lines for the booking are shown for respective project.

At invoice a line is shown for each order line. In the column Price the total price of the booking is shown. If there are several lines for a reservation, the price is only shown on the first line. This also applies to the number of persons in the reservation.

If an order line is linked to the reservation (invoice or a la carte booking) price of the order line is shown in the column order line price.

Incoming VAT report

This list shows the incoming VAT on registered supplier invoices in the selected date band.

Enter the date band and the cost accounts you would like to include on the list.

Accrued accommodation cost per reservation

This report displays the accrued supplier cost on reservation where you have not entered any supplier invoice and not marked as paid to the supplier. You can check the boxes to include also such reservations.

If you will not register any supplier invoices, you can set the status on the reservations to "paid to supplier". You do this by checking the box before each reservation number in the report. All reservations where the open balance is below 1 will be pre checked. At the bottom of the report you confirm to set all checked reservations to "paid to supplier". The system will log when and who did this. If you select to include bookings marked as "paid to supplier", the report will display an extra column with date when this status was set and by whom.

Open payments from your client is shown on the report.

It is possible to include your client's name through ticking this box where you select date band and similar.

The list is sorted on departure. The calculated accrued cost, in the supplier's currency, for the accommodation cost on the booking is shown together with your child discounts and additions, if any. The calculated accrued cost are taken from the costs you have entered on the cost side in the room allotment.

The list can be selected through date of departure or date of booking date bands.

Supplier request overview

All requests sent out from this system is allocated here.

Choose status. Select a status (new request, request accepted etc).

Date. Add from and to date to get a list of requests during that period of time. Leave empty to see all.

Choose supplier. Select a supplier to see requests from a specific supplier. Leave empty to see all.

Continue

Reports Statistics

Statistics

Statistics includes reports that will show historical information but also reports that will show you future sales. Some of the reports will not include bookings done in the ALC module. Those reports are marked with red text (Does not include A La Carte reservations).

Most of the reports can be selected in different intervals (year, month, week and date).

We recommend you to browse through the reports in order to look for the reports that will suit your business best.

The general statistics reports can since 2004-10-12 also be restricted by From and To date to obtain statistics in a certain time period. If these dates are not stated or if any of these is invalid, the whole statistic report will be shown. Since 2006-08-25 can several of the reports be restricted by part of projectID or part of product code and the ones marked with ** can be restricted by part of projectID.
NB older reservations lack information about product code, and this contributes to that product code restriction sometimes does not work on older reservations.

Product. Shows statistics per product and booking sums (historical information).

Product per departure date. Shows future bookings on a product and with reservation sums.

Salesperson. Shows the number of bookings per salesperson (internal salespersons).

Per agent. Shows the number of reservations divided by agent who has made reservations in the system.

Reservations. Shows the total amount of reservations divided by reservations on web respectively internal.

Reservations per departure date. Shows future reservations.

Brochure order. Shows the number of brochure orders made in the system.

Orders Newsletters. Shows the number of ordered newsletters.

Number of clients in the database. Shows the total number of clients in the client database.

Per way of transport. Shows bookings per way of transport (if there are different transports such as flight and bus).

Product per way of transport and date of week. For arrangers that have several departures per week and who want to have detailed statistics.

Product per departure city. Shows reservations per departure city to a specific destination.

Project per departure day. Shows reservations on upcoming projects.

Per zip code and departure date or booking date. With these reports you can study your sales in different zip code areas. You can use this along with “Group zip codes by the first characters, leave empty to group by the whole zip code:” to determine sensitivity on the zip code.

Project per departure date. Shows reservations on upcoming projects.

Cancellation insurance. Shows booking value of cancellation insurances grouped by departure date or booking date.

Project type. Shows booking value per project type grouped per departure date or booking date.

Gender. Shows the number of travelers and booking value per gender, grouped per departure date or booking date.

Nationality. Shows booking value and the number of persons per nationality, grouped per departure date or booking date.

Discount code. Shows discount (not automatic Internet discount, child discount and discount given in free text fields) grouped by stated discount type and per departure date or booking date.

List of all bookings

This report gives you a list of the latest bookings with a link to each booking. It shows 500 bookings as standard.

You can choose to make restrictions of the list on the basis of a combination of the following criterions: part of marketing code from booking date up to booking date, salesperson (makes a search of administrator's user code and agent's user code).

The date searches can be left in open intervals, i.e. if you choose search reservations from May 1st and later you state 06-05-01 (or date in your local format) as From date and nothing in To date.

Tick Include only active reservations if you want to exclude cancelled reservations from the list.

Latest online bookings

All web client bookings are displayed regardless if the client has chosen confirmation by e-mail or by normal post.

Transport allocation overview

Transport allocation overview is your instrument to check transport availability and to get a quick overview of allotment, booked and free spots on your transports.

The list can be sorted in different ways. You can also select to limit it to only transports including a selected text in the transport ID.

- By a certain date interval.
- minimum number of pax booked on a transport
- maximum number of pax booked on a transport.

To include inbound transports click the blue link at the top.

Connection overview

Start with choosing a date for the connection. Choose the date that corresponds to the transport out date (outbound transport).

If you have more than one connection use the window to search for the connection that you will print a list for.

Tick the box to insert the destination/s you want to include in the connection. If you choose all, all destinations on that specific date will appear on the list.

The list is chronological order which means that it starts with the first departure city (pickup time).

Statistics per departure date and sales date

This report is used to see your sales situation per a certain date for an upcoming period compared to the same time in a preceding period. You can choose if you want all sales done during e.g. 2004-01-01 to 2005-09-10 (if 2006-09-10 is today's date e.g.) for departure 2006-01-01 until 2006-12-31. Then you have an historical report of the sales done for the upcoming year per 2005-09-10 and it can be compared to an ordinary statistics report of sales during 2007-01-01 -- 2007-12-31 (today 2006-09-10).

Sales development report

This report will you show the sales development on selected packages (number of travellers). You can choose to extract the report by inserting a from and to date or add a number in the field overview from this date and forward.

Limited search can be used if you want to narrow your search. You can as an example insert a package name. The report will then only include packages with the selected name. Further selections are

-Include transports with a set number of places left to book (Example: write 5 if You want to see transports with 5 and less places left to book). Leave empty to include all.

or

-Include transports with a set number of reservations (Example: write 5 and transports with up to 5 reservations will be shown). Leave empty to include all.

You can decide how you want the sales development to be presented. By adding 3;7;14;21 etc the sales development will show you the number of bookings over the last 3 days, 7 days etc.

Net sales

All ordinary statistics report only shows active reservations, except for reports that specifically show cancelled reservations.
When you show statistics per booking date all the active reservations on that booking date, independently of when the reservation has been cancelled, are shown.

This special report is used to be able to see the net sales for a given day, week, month or year. The report shows the sum of all new reservations for a given period of time and all cancellations, regardless when booked, for the same period which gives the net sales for this period. The amount is shown in turnover and number of persons.

It's also possible to limit the report to a certain type of project by stating this on the search page.

Red-marked amounts shows reservation value and the number of persons in cancelled reservations that day.

Set joker signs by yourself

In several reports you can search for part of the product code or similar. If you write PAR as an example (those searches are not case sensitive, so PAR and par will give the same result), all those containing PAR will be included, such as SAPPARRA, PARIS. Technically this is a search with a joker sign before and after PAR, %PAR%.

By selecting the Use your own joker sign, you will be able to insert the joker signs instead of having the system to set them before and after. This is very handy if you would like all starting with PAR but not SAPPARA for example. In this case you write PAR%.

You can also set a joker sign wherever you want inside the search text, such as P%R will give both PAR and PIR.

Reports Production

Overview future trips/tours

This function gives you an overview of all future tours. The statistic is divided into:

Transport out allotment
Project allotment
Transport in allotment
From the overview you can access several other reports/lists:
-Overview room availability
-Hotel list
-Transport list
-Project
The reports and lists will correspond to the project you are looking at.

Overview room availability

Overview room availability will show you all rooms booked and available on a specific hotel within a date interval or all hotels.

Explanations to

Transport list

The transport list can be sorted after booking number, hotel and inbound destination (see sort order).

Summarized. Tick this box to include ONLY the order person on each booking.

Select a transport and make your choice in the list of choices.

Special function. Clients that have not paid or only part of their total amount will be shown here.

Room allocation overview

Room allocation overview gives you information about your room allocation. You can extract a list of all hotels during a certain time period or you can look for a single hotel in combination with a date period.

Explanations to abbreviations:

Rooms. The number displayed shows you the total amount of rooms in allotment for this room type and period.

T. Stands for taken and is equal to booked rooms in this category.

X1. Stands for double room with one extra bed

X2. Stands for double room with two extra beds.

E1. Stands for a double room with one empty bed.

E2. Stands for a double room with two empty beds.

Constr. Shows the total amount of available beds for this day and the combination of allotment entered.

Connection list

Start with choosing a date for the connection. Choose the date that corresponds to the transport out date (outbound transport).

If you have more than one connection use the window to search for the connection that you will print a list for.

Tick the box to insert the destination/s you want to include in the connection. If you choose all, all destinations on that specific date will appear on the list.

The list is chronological order which means that it starts with the first departure city (pickup time).

Transport list per departure city

The transport list per departure city shows the same information as the transport list. This list however also adds departure cities for those operators working with connections. The list is sorted by departure time.

List of travellers per selected departure city

This function will show you travellers (active bookings) that have chosen a specific departure city independent of which timetable they are connected to. You can either choose to select the list based on a package or if you leave this field empty, the report will show you all travellers. You can choose to add a date or if no date is added the report will show you all bookings with departure date from today and onwards.

Cabin List

Cabins are connected to transports. You will therefore choose a transport to be able to take out a cabin list.

Design your list by choosing what you want to include on the list.

You can sort the list by booking number and cabin type. Click the header at the top to sort.

Room list per hotel

Different types of room lists can be extracted from the system:

Room list per hotel.

Room list for several hotels at a destination. You will receive a room list for all hotels in a specific period of time and at the chosen destination.

Project room list. Use this list when you have several hotels on the same project (for instructions see Project room list).

Hotel. Select the hotel that you want to take out a room list for. If you want to select all hotels in a certain time period tick instead the box **all hotels**.

Product code. Choose a product code to select all hotels connected to this product code. The box all hotels must be selected to extract all hotels.

Period. Insert from and to date to get hotels during a certain period of time.

Other choices. You can design your list by choosing to include information such as transports comments etc. Tick the box to include.

Language. The hotel list can be extracted in different languages. Choose the language.

When the room list has been retrieved a pop-up window appears in the same way as when retrieving reservation confirmations for printing.
Notice that for this to work it requires that you haven't blocked pop-ups on your site.
By confirming "printing" of the room list status on these reservations are set so that Travelize know these reports are meant for hotels/hotel agents and so on.

Hotel guests for a certain day

Normally the room list selected per Arrival day to the hotel is used.

If you for a certain day want to see which reservations there are in a specific hotel or hotels that's been connected to product code, this report can be used instead. This is particularly useful if you for example have long time customers, to easily see when these have checked in.

Notice that when dealing with project reservations the list will be based on the project's main hotel.

Status list of sent room lists

When the room list has been retrieved a pop-up window appears in the same way as when retrieving reservation confirmations for printing.
Notice that for this to work it requires that you haven't blocked pop-ups on your site.
By confirming "printing" of the room list status on these reservations are set so that Travelize know these reports are meant for hotels/hotel agents and so on.

By new reservations, modified reservation and changed booking this event is set as status for the reservations.

With the report status list room you can search for a specific hotel or for all hotels. It's also possible to combine All hotels with restrictions on Supplier or product code. Notice that if you are not searching on a specific hotel always tick All hotels even if you make restrictions on Supplier and/or product code.
The product code is the one that's been stated on the hotel, which is not compulsory information, and only works if you have entered it.

State date period (compulsory).

You retrieve a list of all new, modified or changed reservations on chosen hotels during the chosen period of time. Through the link to the right you can manually set status for a reservation as reported to the hotel.
This will be done automatically the next time you retrieve the room list and confirm in the pop-up window. Notice that Cancelled reservations won't appear in the room list, so in order to mark these as reported you have to click the link to the right in the status list.
Also notice that by changing a reservation from one hotel to another, the reservation at the new hotel will be shown as Changed, and the old hotel/type of room is in the line above. If you search for a specific hotel, the search will be for the hotel it's changed to.

Arrival overview

This report gives you a list of all bookings linked to a product which destination is a part of the name of the destination you are searching for.

If Destination name is left blank the report will include all destinations.

It's possible to restrict the report with From date and/or To date. If no From date is stated the current date will be set as From date.
However you can state a date that has passed to get the report for earlier dates.

The report can be restricted by setting destination name and/or part of product code.

Number of results per page states the number of lines to be shown on each page in the report. You can set this value between 1 and 2000 lines per page. If the report is larger than one page you get quick links to all pages and you can also browse forward/back. It's also

possible to tick Show hotel to show the list divided per hotel and date. Both departure date and check in date is shown.
The report shows all active bookings, even the preliminary booked ones.
Infants is not showed in the report.

Hotel statistics

This report will show the historical occupancy on a certain hotel. By choosing a product you can extract statistics on all hotels connected to the product.

Room availability overview

This report will show availability for room types entered on the selected hotels. The hotels are selected by the Product Code entered on the hotel. The system will look for hotels where the product code is like the product code stated. Please note, you have to have product codes on the hotels to use this feature.

Please note that the date band should not be to wide as that would make this list very big.

The report can be displayed in three different ways: graphical, numerical in number of available beds and numerical in number of available rooms.

If A La Carte reservation is available in your system you will be able to click on any bookable hotel / room type / date and will be taken directly to the A la carte reservation on that date from the Graphical report.

Legend to colors in the graphical report:
green Available on allocation

yellow On request

orange Fully booked

red Stop sale

black Nothing set for the date

Overview bookings per hotel

This function provides a statistical overview of selected hotels with number of persons and bed nights (persons x nights). The report can be used in negotiation with the hotels and similar.

The report is selected on date band for check in dates. N B, a reservation that checks in within the date band, but with a check out after the end date, will be calculated in total even though the reservation checks out after the end of the date band.

Package code or ALC for a la carte is stated as well as the check on and check out dates.

List all full paid bookings with no voucher sent

Shows a list of all full paid bookings including a hotel with no voucher sent. Mark the bookings you want to send vouchers to and then click on the button. The voucher page will open with the selected bookings.

Additional sales

This report gives you an overview of all additional sales. You can search by project or transport to get the items sold as additional.

You can also search for a specific addition by inserting the name and push continue.

Reports Special

Hotel voucher

You can extract vouchers for a single booking number, a project or a specific period of time.

Include bookings where vouchers have been printed. Use this to include bookings where vouchers have been printed before.

Booking number. Insert a booking number to extract a voucher for that specific booking number.

Project. Insert the project ID to extract all vouchers for this project.

Date. Insert departure date to extract all vouchers departing on this date.

Additional selection.

Choose selection to send vouchers. If you want all vouchers to be printed select by normal post.

Cax list

Gives you information about all pax that have booked a cancellation insurance. You can search according to date (booking date)

Travel insurance list

Use this list to see all clients that have booked travel insurances in the system. You can extract information by selecting:

Departure date. Insert from and to date.

Booking date. Insert from and to date.

Status list Paxport export

The status list shows all transports with departure in a given period of time. It shows if the PaxPort/TopCom list is confirmed as retreived or not.

NOTICE - the number on the status list is the total number of persons booked for the transport.
The PaxPort/TopCam report does not contain the preliminary booked ones.

If the list is retreived it shows new bookings, changed bookings or cancelled bookings belonging to that transport.

By clicking transportID you get directly to Export of PaxPort list and you are in this way able to retreive a new list.
At export all active and any cancelled/changed bookings are displayed on the screen. When confirming them, status is set not to show these bookings in the status list, in case they are not modified, changed or cancelled.

Export Paxport files

This function exports a file in PaxPort format per chosen transport. It exports all active reservations that aren't preliminary booked.

Search for the file to be exported and continue.

To send the report, right-click on the link and download the report to you computer, from where you can attach it to a e-mail message. At the bottom is a Confirmation button. When you press this button the export is logged onto all of its included reservations.

When you make changes, change a reservation or cancel a reservation these are shown on the PaxPort status list.

Changes in a reservation and cancelled reservations made after the latest report are also shown in the export.

Transport voucher

This function will give you vouchers for a transport. Insert the transport code (LGW as an example). Add you date interval. Push continue. A list of bookings will appear and you can mark single booking or use "mark all". You can also add a text that will be printed together will all other information on the voucher. Continue and print vouchers. Do not forget to push confirm in order to mark them as printed.

Price list generator

This function generates price list from room allotment resources in the system.

Select date band for the price list.

Select the package duration you would like to create prices for. Separate multiple values with comma (,) such as "3,7,14" which will calculate package prices for 3, 7 and 14 nights respectively.

Set a flight price that will be added on top of the price you have on the room allotment.

The price list will be created in two separate parts, one for normal hotel packages and one for apartments.

For normal hotel rooms the report will show number of nominal persons in the room and the empty bed addition.

For apartments the price is calculated for the different number of persons that can be accommodated in the room.

If you have already entered packages with prices, you should use the function that creates price list based on packages instead.

Age report

This report shows the age of the passengers where date of birth is given.

It is possible to state open intervals for age: If no ages is stated all ages are shown, if only a lowest age is stated all ages from this age and older are shown and so on.

It is also possible to state restrictions on the departure date in the same manner as stated above.

As default only trips with departure the current date is shown. If you also want to see earlier departed trips change the default date. Restrictions can also be made on part of projectID.

The report is sorted in order of date of departure and thereafter by project.
Total statistics with the lowest age, the highest age and the average age are shown at the bottom.

NOTICE: These statistics show total statistics independently of whether age limits have been stated.

Price list package

This function presents a complete price list according to your choice of travel length and date interval. If you wish to have a presentation with different lengths of travel you have to separate these with a semicolon (8;15;22 etc). Please observe that the travel length includes arrival and departure day. A 3 day hotel stay is hence 4 (travel length, 7 nights at the hotel will render 8 days of travel length etc). To get a price list with one and two week prices you have to write 8;15. The **transport field** will make it possible no narrow down your price list. By adding a transport main ID (ex LGW) you will only get packages with an out transport from London Gatwick. Leave empty if you do not have packages with transports. The **package field** is used in the same way as with transports. By adding the package code you will only get packages according to the code. You can also use the **product code** to limit your presentation.

Another possibility is to combine transports, packages or product code with a week day. An example would be to get a presentation of all combinations departuring from London Gatwick on Fridays.

By ticking the box "show package" also the package code will be visible together with each price. This is useful if you want to change prices on packages. By clicking the package code link you are taken to the package page and will be able to amend. Please observe that the price list will not be updated before you update the package price list page.

Manual discounts

This report gives you a list of all reservations where there is a discount in some price field or discount field.

Child discount, Internet discount and similar automatic discounts are not included in this report.

You can search by reservation date and/or departure date in open intervals. It's enough to set a From date to show all reservations after that date, or a To date to show all reservations before that date.

Customer administration

Print new confirmations

New confirmations are not printed out automatically. They are stored here until you decide to print. A window will appear at the upper left corner informing you "ready to print". Do not confirm before you have seen that all confirmations have been printed properly. To print out confirmations you will be required to complete the following:

Go into "file" and choose print. Please observe that you need to use the following print settings to be able to print the confirmations correctly.

Standard print settings for confirmations:

- Header and footer shall be empty.
- Left margin normally to 6 mm, top margin normally to 6 mm and bottom and right as low as possible. If you need to fine-tune, adjust the Left and Top margins only.

Check that all confirmations have been printed correctly. If yes click on confirm print. The printed confirmations will disappear from the printer queue. You can print a maximum of 100 confirmations at each time, if more, confirm and re-process to get the next in queue.

Print single confirmation

If you want to print a single confirmation please use this function

Copy number of new e-mail confirmations

Confirmations coming from clients that have chosen "confirmation by e-mail" will be stored here. If you wish to print out paper copies you're also able to do so.

International confirmation

The international confirmation can be used to print out confirmations on different languages. The confirmation has a special design and it is possible for you to insert special information such as IBAN number and payment instructions when paying from abroad.

This function can be configured on request.

All for printing/printing queue

Printing of confirmations can be managed in different ways.

Print single. Directly after confirming the booking you can choose to print out the confirmation.

All for printing. You can also choose to print out confirmations at one and the same time. A booking that is not printed at once will automatically be transferred to the printing queue. The printing queue can be managed by any user. Confirmations that are not printed appears as a warning link and as long as no one prints and confirms is visible for all users.

Re-send confirmations

This functions is useful if you for example have lost an invoice for a certain client or for a group of clients, or if you have changed important information in the booking that you want to be made clear on the booking confirmation. If you wish to re-send any confirmations you will be required to use the following functions.

You have different alternatives including:
1. Search by project. All clients connected to the project will be displayed.
2. Search by transport. All clients on that transport will be displayed.
3. Search on previous printing date. When you printed the confirmations you can add that date in the empty field and those clients will appear.

After you proceed, you select which bookings to include. If you want to include all clients by clicking "select all". You can select individuals by ticking the specific box.

Additional selection. This function states the way you would like to re-send the confirmations. If you choose email, the confirmation is sent to the e-mail address stated by the client. If you choose usual mail, the confirmation will be put in the printing queue and can be printed as usual.

Write letter/message

You can use this function to send letters/messages to your clients.

Select text. You can store text messages and use them when sending letters to your clients. If you want to add and store a new text message push **amend/add text**.

To select clients to send a message to you can:

Search by project, transport dates, previous printing date, and similar.

Special function

If you tick the box include only those no ticket sent, only bookings that has not received a ticket will appear. To mark client ticket sent see instructions below.

Choose to whom you want to send the message to. To select bookings tick the box in front of the booking number or select all if all clients shall have the message.

Additional selection.

Choose in which way you want to send the message. Read instructions on sending options.

Type. Use this function to send a letter or to print labels to the selected clients. To send letters choose post & email. To print labels select type of label.
Continue.

Set all selected as ticket sent. Use this function to mark clients that will receive a ticket with this message.

Send message to clients with split invoice. If you use split invoice and wants to send a message to these as well, tick this box.

Subject and message. Write the subject and the text message here. If you have selected a stored message the text is already in place. Your username will appear in the message and you do not need to write it.

Left justify and right justify. The address of the client will appear left or right depending on your choice.

Save as a message on each client. If you want to save this message on the client tick this box. You will find the saved message on the client information document (see add/amend client/customer administration).

Request confirmation of message. If you want clients to confirm receipt of your message tick this box. Clients receiving the message by mail will confirm it by using a secure link in the e-mail. Confirmation is saved on the client document. Clients receiving the message by post will confirm by calling your company. To confirm the message go to the client document and tick the box confirm message.
Unconfirmed messages will appear as warnings after a pre selected number of days and until you confirm receipt stay as warning message.

Amend header and amend footer. The header is normally used to display your logotype on letters. Footer is for company address.

Push continue to create letters or labels.

Send letter to a chosen person

Click the link to reach Write letter/message. All the customer's bookings will be shown there and you can send your letter/message as usual.

Request confirmation of message

Tour operators are sending out a lot of messages/information to their clients. Some messages are important to keep track of. Messages containing information about cancelled tours of changes in timetables needs to be followed up.

Messages sent out with the function request confirmation of message gives you a warning if clients are not responding within a certain time period. For instructions see write message/letter/customer administration.

Search for booking

All fields can be used to enter information and the system will search for the booking.

Amend booking

Enter the booking number and click on continue. You have several options to amend a booking.

Amend information. You can amend rooms, cabins, connections, due date etc. To save an amendment update the booking.

Amend client information. The order person can be amended by pushing the link marked update order person.

Cancel a person. To cancel one person on a booking tick the box cancel this person. You have to amend rooms and cabins if any to fit the new number of persons on the booking. To cancel the whole booking push the link **Cancel**. You use the same link to **reactivate** a cancelled booking.

Amend booking. If you want to amend the total booking (change to a new tour/dates) push the link amend booking. You will return to booking engine and can choose destination etc. All information about the client is stored and will appear in step 3.

Amend booking

This function will let you amend or rebook a booking to the same package (if you want to add travellers, re calculate discounts and similar)or to a completely new package. If you have the ALC module you can change to a package and vice versa.

Cancellation

Enter the booking number of the client that you want to cancel and continue.
If the client has made payments and you shall keep a cancellation fee please enter this information into the field marked "cancellation fee". Information about cause of cancellation and info about refund accounts etc will be entered in the next field.

If the cancellation is a split invoice. All clients on this invoice will appear. You can decide if the individual clients shall have a cancellation fee.

The cancellation fee is automatically transferred to the bookkeeping function and will be book kept as cancellation fee on the cancellation date.

To print a cancellation confirmation please tick the box.

Cancellation confirmation

When canceling a booking in the system you can choose to send or not send a cancellation confirmation to the client. A cancellation does not automatically trigger a cancellation confirmation as many cancellations are done before payment has been registered. Those cancellations does not normally need a confirmation.

If payments have been registered on the booking and if the client is entitled to get money back, this information is displayed on the cancellation confirmation.

When cancelling you need to tick the box for confirmation or manually print a confirmation afterwards through the normal print single confirmation.

Connect booking to a new customer number

Sometimes it is necessary to connect a booking to a another customer number. An example is when the lead passenger cancels but the other will continue to travel.

To connect a new client to a booking insert the booking number and thereafter search for the customer this booking should be connected to.

Preliminary booked/waiting list bookings

Preliminary booked clients have taken allotment but no confirmation has been sent out automatically. Use "select all" if you want to include all clients or tick the box for those that you want to handle.

You have two options
1. Confirm the selected. A confirmation will be written.
2. Cancel the selected. The clients will be cancelled

Booking and cancellation on surveillance/ follow up

When booking, in step 4, you state a follow-up date and the booking will at that date appear in a list with follow-up bookings showed on the start page. This date can be changed or added from the booking as well.

This follow-up is not related to whether the booking is preliminary or not.

Also when canceling a booking this date can be set, e.g. to follow up that a medical certificate has been received etc.

In the list of follow-ups, an Internal comment from the booking and cancellation comments are shown to make measures easier.

To remove a booking from the follow-up list, the follow-up date is removed through amend booking.

Search/amend customer

You have several options to search for a client. All fields are searchable.

If you have the module Travelize marketing you can also use this function to tag a client to a specific customer category.

Delete a client. If you have a client in your customer database. If the client has made a booking in the system you will not be able to delete the client. This would ruin historical data in the system. You can however **deactivate** a client. Push the link deactivate. The name of the client will appear in red text.

Export client information for labels etc. If you want to export client addresses to a file you will use the function **custexport.txt**. The file can be used to print labels or merged letters.

Add client

If you have leads that have been generated from outside the system you can register them in this function.

This function is also used to send out brochures to new and existing clients in the customer database. See expert customers for further description.

To create a label for a brochure sending tick the required brochure. Push update and the information is transferred to new brochure orders (for further instruction see new brochure orders/reports).

Advanced functions for customer search and exports

These functions are made for different exports. The system supports exports to excel and text files. It is also possible to use the mail function to send out exports. Most fields in search/amend customers can be used to extract information/files. If you wish to extract special combinations you are welcome to contact Travelize support. We can create custom made search reports for you.

As default the box "only not inactivated" is ticked. This is to make sure that clients that have been inactivated are not part of your export.

To make the exports you will now have to make a choice between excel export or a text file export.

As default the system will not make any removals of duplicates. If you want the system to make a "virtual" removal to avoid duplicates tick the radio button "remove duplicates in export". The system will search for the three first letters in the first name, family name, address and the complete postal code. If the system finds a duplicate by comparing these facts, one of the customers will be virtually removed. Please note that the customer will **not be deleted** from your customer database, only not included in the export.

Another option is to use remove duplicate by comparing telephone numbers. Try both methods and compare to make sure which one of these options fits your company best.

Quick function for amending first name and family name

This function is used by companies with the enterprise module where bookings can be made by other companies within the same database. To restrict access to the main booking but still giving the possibility to amend name.

This function will give you the possibility to change first name and family name as well as date of birth.

Split invoice

Split invoice gives you the possibility to do one booking with 2 or more clients and send each and individual invoice.

Directly after confirming a booking in step 4 a link will be visible with the text split invoice. Click this link to make a split.

If you want to make a split invoice out of a booking that already has been made, enter the booking number here and continue.

You have several options how to split the invoice:

Equal all clients. The system splits the total amount equal on the number of clients on the booking.

Free sum all clients. Use this when sums differs from client to client. Note that the total sum of the booking must correspond to split amounts. You have to divide the deposit as well.

Equal split 2, 3, 4... clients. Choose the number of clients that you want to split with.

If you have chosen equal all clients the system has divided the total amount and each client for you, but you can manually amend in step 2.

If payments have been registered on the booking you will need to split the payments as well.

To delete a split invoice you use the same function. Insert the booking number and choose equal all. Push the blue link at the button and leave the document page. The splitting is now deleted and you can do a new splitting or if the aim was to undo the splitting print a new confirmation.

Room division

On bookings that contains more than one room unit, the system will automatically split travellers and make the room division. You can use this function to manually change that and divide persons into room units at your wish.

Insert the booking number. A new window will appear with the names and the room types.

Start changing rooms and be observant that you are not using the same room for more than the designated number.

Amend coach connection on travelers

This function enables you to change the connection for travelers on coach transports. It is typically used when two different connection lines are merged and travelers should appear on the new connection list.

Select the date for the transport.

Select the time table you want to change FROM through entering a part of the time table's name and Search. Click on the one you want to change from.

Do the same with the time table you want to change to.

Select direction (out/in) for the transport.

In step 2 you can select All cities. In that case all city names matching the old and new will be automatically transferred to the new time table with the same city. Those which cannot be matched in this way has to be manually put into a new city on the new time table. **NB No validation is made that the times/cities are equal. You have to inform the customers. Please also note that any connection fee will be kept from the initial connection fee.**

When you have finished updating in step 3 you can go use the short cut to "return to step 2" so you don't have to select day and transport in step 1 again.

Free invoice

Free invoice

Create a free invoice

If you have products which are not part of any package you can use free invoice to create a booking and be able to print an invoice.

Please enter the following information:

Specification. Enter the product/text you want to invoice.

Insert price, cost and VAT. Cost and VAT are not compulsory. If you enter a VAT sum this will be used to calculate VAT and the VAT sum will be shown on the invoice.

Commission. Please note that the commission inserted here is a so called production commission (se instructions reports/production commission. Insert a numerical value (8 = 8 % in commission).

Supplier. If you are using the supplier system in Travelize you can search and insert a supplier here (see instructions supplier administration).

Click add to enter this order line.
Repeat the process to add more products to the same order.

When you are ready click **continue**.

The next step is to fill in client information.

If the client already exists in your client database click to search for clients. This works the same way as the ordinary search/amend client (see instructions search)amend client/customer administration).

Confirm your shopping basket after entering client information.

The next step will be to invoice your order/shopping basket. An order not connected to a supplier is now registered as a new request. To create an invoice tick the box in the row marked with I (I=invoice). Push the button I to continue. A new window will appear with the details and if you are sure to continue push invoice. An invoice has now been created and to print it push **print confirmation**. To enter into the booking push booking number.

If you have connected the order to a supplier and an email has been sent with your request, you will find your order by changing status to request sent (status board in the upper right corner).

A free invoice booking can be amended as normal bookings (se instructions amend booking/customer administration)

Orders per status

Orders per status is a function for those using free invoice for request orders. You can see orders by status by changing the status filter. The following status levels are available:

New request. All orders created in the shopping basket receives this status before continuing to invoicing.

Request sent. A request connected to a supplier with an email address receives the status request sent. The supplier receives an email with a secure link to the system.

Request accepted. If the supplier confirms the request, the order will change status to request accepted.

Request changed. The supplier has the possibility to change the request. A changed request is submitted with information from the supplier.

Request denied. The supplier can also deny a request.

Invoiced. All orders being invoiced are listed here.

Voucher sent. You have the possibility to print a voucher after invoicing the client. There are different settings in connection with vouchers. You can for example allow the system to send a voucher automatically if payment for invoice has been received.

Print voucher for Free invoice

This function creates vouchers based on the Free invoices.

Search by the booking / invoice number. Please note that the order lines have to be invoiced to be able to print voucher.

If you would like one voucher per order line, tick the box for this. This will only affect the printed voucher, not the e-mail voucher.

Finance Payment

Manual payment registration

The payment function works in 4 steps:

Step 1. Add the number of payments you want to register.

Step 2. Add the total amount of the payments you want to register. Choose payment account. The date is automatically set to the day before. If you have cash payments please change date.
Enter the booking number and the amount paid.

The system will check for errors by checking that you have entered a valid booking number and that the total amount is equal to all amounts per booking number.
Continue

Step 3. If everything looks OK confirm the transaction or if you want to change anything click amend and you will be taken back to step 2.

Step 4. You have now confirmed the payment and it is duly registered. You have received a payment reference number, with this number you can search for this transaction using the reference number. The system will create de coding instructions and will also separate VAT.

Split invoice. A split invoice means that payment will be received from different persons. When you register payments on a booking that has been split, the system will automatically warn you in step 4. The persons connected to the split invoice will appear and you need to fill in the amount paid in on each person or the person that has made the payment.

Manual payment/print receipt

This function is used for cash payments (over the counter payments) and for those operators using gift certificates. You will find this function directly after confirming the booking as well as under finance. The manual payment gives you the possibility to print a receipt of the payment. This function is similar to manual payments but will only take one payment.

Gift certificates. Gift certificates can only be registered in this function. You can combine cash and gift certificate payments and print a receipt. You can also register a gift certificate only. Each certificate that has been issued by the system has an ID. You need to write the ID number when registering. The system keeps track of the value and gives clear information if the certificate is valid for payment registration.

After you continue, the receipt will be shown and you can print it out.

Automatic payment import (OCR/BACS)

Download the file from the bank. You have received the file from the bank and it has been saved on your computer.

Select Import OCR in Travelize and select the file which you have downloaded.

All payments are presented in a list. If payments are part of the file that can not be accepted by the system (wrong or no booking number, wrong OCR-id etc) these will appear separately. These payments will not be imported. Print the list if you have such payments, these need to be taken care of manually.

Confirm the import. You will be taken to step 4 in the payment routine.

The system controls that the file has not been down loaded before. If this is the case the system will tell you that the down load could not be confirmed.

Payment transactions

Payment transactions is a list of all transactions that have been made on a single booking number. This is a fast track to check the balance of a single booking.

Payment lists

You have two options to search for payment information:

1. Search by date. All payments inserted into the system will be displayed between the dates you have entered. You can either choose all accounts or sort by a specific account within the date interval.

2. By voucher/reference number.

A total list of all payments produced will be screened.

Special functions

Bookings that have paid more than the deposit but not fully paid. Helps you detect payments where the deposit is registered twice on the same booking.

Booking with payments above total cost. Helps you detect bookings with more money paid in than the total value.

Reminders

Choose the type of reminder you want to send out (deposit, final payment, cancellation fee or all at the same time).

Order by. Sort by due date or by departure date.

Choose minimum days from the due date. You can also choose the number of days since the last reminder (previous reminder).

Minimum amount to be displayed. If you want to exclude bookings that has a minimum amount to be paid (1 or less as an example).

Only include reservations with at least the given number of previous reminders. If you add the number 1 you will be shown a list with all bookings who have received one reminder.

Include preliminary booked. Tick this box to include preliminary bookings.

Only not departed. Untick the box to see only not departed bookings.

Sent to payment collections. Choose one of the options to mark reminders as sent to payment collection.

Date. If you want to see bookings within a certain date interval set from and to date. Leave empty to include all selected reminders.

Continue to step 2.

Have you chosen both deposit, final payment and cancellation fee the system will show you all clients in each category. Choose either, send to all selected, or tick the box for those that you want to send it to.

Or you can cancel the selected using the same principle.

When you confirm the page, reminders will be sent and information stored.

If you have sent out a reminder the system will confirm that a reminder has been sent.
If you have cancelled it you will be taken to the cancel function and you will proceed as usual with a cancellation.

List split invoices on one payment

This is a special report used in conjunction with Split invoice. A split invoice is used when the same booking have more than one person that will receive an invoice. This report will show all payment transactions made on this booking and per person .

Edit credit cards

Here you can activate/inactivate which kind of card types to be used by the system, by ticking the ones you want to be active.

NB that you have to agree with your redemption company about which card types you are activating, or else they may not be accepted.

It is possible to change the name if you want the name of the card type to be shown in another way than as standard.

If you use Card fee (must be activated by Travelize support) then the fee also will be stated. The card fee may only contain figures and % -characters. If a %-character has been stated the fee will be in percent (e.g. 1,25 %), without percent character the fee will be in the chosen currency.

Issue gift certificate

When you want to issue a gift certificate you start with finding the client in the customer database. If the client does not exist in your database push add client and fill in the required information.

You will now insert information to be able to issue the certificate.
The name of the client is automatically filled in.

Text. Place for text information on the certificate.

Amount. Fill in the value of this certificate (only numerical)

Valid through year. If the certificate is valid for four years insert 4.

Payment. Choose cash, invoice or gift cheque.

The gift certificate is now ready for printing. It is issued in three examples.

To register a gift certificate as payment or part of a payment see instructions manual payment/finance.

Finance Bookkeeping

Add account

This function allows you to enter new bookkeeping accounts into the system and change existing ones.

Administration of accounts

Accounts. Enter the account number.

Account name. Write the name of the account.

VAT sum. If you are entering a VAT account write the VAT sum (numerical 25% VAT = write 25).

Account type. Choose type of account. Only those set as payment accounts will be selectable when registering payments.

Active. Active setting is default. To inactivate an account untick this box.

Click continue to save settings.

To change an account press change at the right hand side of the account name. Change and update.

Currencies

To be able to use different currencies in the system you need to add them here. Insert a currency code (EUR etc) and the exchange rate you will be using. If you change the exchange rate all tables using the rate will be changed as well.

Book keep

This function is used to book keep revenues in the system. It will also create lists and summaries of revenue information for the accounts department. All accounts receivable will at a certain point become revenues. When this happens depends on internal routines but the normal procedure would be to reconcile revenues by departure date.

Start with inserting from and to dates for the period you want to book keep and continue.

You will now receive a list with all bookings ready to be book kept. Ticked bookings mean that they are fully paid and can be book kept. Unticked bookings require your attention as the system will not book keep them due to unbalances in total cost versus total paid. You can manually tick these bookings if you want them to be book kept. You can also select the tolerance level in step one to automatically include all with a difference up to the selected amount.

Push **Next** to continue the process.

The next page gives you a summary per project. If you have inserted revenue accounts (see instructions add project/travel administration) and/or advanced VAT calculation (see instructions calculations) the summary includes revenues and VAT sums per account.

Print this page for the account department. Push thereafter **Confirm** to finish the complete transaction.

The bookings are now registered as book kept in the system and **you are not allowed to do any changes on these bookings**. Corrections of balances must be done in your bookkeeping system.

Repayment routine

All bookings where the total paid amount is higher than the total cost of the booking will be processed here. It can be due to cancellation, rebooking, overpayment etc.

As the accounts receiveable is integrated in this system a cancellation where payment has been made needs to be balanced.

This is how you manage the repayment routine:

Tick bookings that you want to reconcile. The system does not automatically reconcile repayments, you need to go through the list of bookings and tick the box in front of each booking. You can also choose to **mark all**.

Tick the box includes only those bookings where payment has been registered to exclude cancellations where no payment has been registered.

Sort. By pushing the arrows in the headers for booking number and cancellation date you can sort the list in different ways.

Before you push confirm **print this list**.

Total of customer receivables

Customer receivables need to be summarised and balanced several times every year. You will enter a date (ex. end of the month). The report will show you all bookings where a payment has been registered but not yet departed. Late payments may not yet have been registered in the system.

Please note that this list can contain a lot of information, and take some time to load.

Total of customer claims

This report will show you a list of customers that have departed on a certain date but still have an amount outstanding on the selected date.

Contribution margin per booking

This function calculates contribution margin and profit per booking provided that all cost are registered on the resources for transport, accommodation, additions and free invoices.

It is possible to search on date of booking or departure in open intervals. It is enough to enter from-date and all bookings after that date will show up or you can choose the to-date and then all bookings before that date will show. You may also restrict your search on product or vendor/agent. A maximum of 2000 bookings will be shown so limit your search in logical intervals. The cost for transport counts as fixed cost divided with either the amount of transportation cost estimate or the real amount of bookings. You choose this when you are going to get the report (the real amount of bookings will show automatically but if you collect the report before all the bookings are done it is probably better to count with number of calculations). Added to this is the variable cost per transport. On a regular basis both transport of departure and arrival show as resources. You can choose to have all costs on the transport of departure, in the report, and none on the arrival.

Accommodation costs are calculated on the basis of the costs from the room allotment on a daily basis. The daily cost may vary. In the report you will find room type and total price and if you want a more precise daily distribution of costs you choose that before you collect the report.
All additions (according to the advanced choice of extras handle, not choice of extras in proportion to the product or cancellation insurance and travel insurance) will show afterwards.
Total profit margin and profit per booking will show in the column in the right corner of the screen.

The sum of revenues and costs and profit for the existing bookings will show in the end of the report.

Finance Reports

Invoice log list

Insert the to and from dates for the period you would like to print as your invoice ledger. The invoice ledger is a complete summary of all print sending of confirmation in the system including cancelled bookings. As all transactions/amendments will be registered booking numbers can appear several times and **the summary of the list is not equal to the total revenue**.

Customer claims/receivables

Customer claims/receivables gives you an overview of outstanding amounts per booking. You can search accounts receivable either by selecting a **transport** or a **date interval**. If you are using the from and to date to look for accounts receivable you can also select by choosing a product. For all bookings select all.

Push continue to receive the list.

Total customer claims per selected date.
Use this function when you want a list of all outstanding receivables up to the date that you write after pushing the link. If you want outstanding accounts receivable per year end then write 31.12.2004 and push continue. The report will take som time to load.

Due amounts for bookings with departure until today.
A function to use for a last check of outstanding amounts short before departure.

Balance payments per project

This report is based on projects (will not include A la carte / dynamic bookings, free invoice etc). Add a date interval (departure period). All projects will be listed within the chosen date interval and sorted by day. All payments are shown and outstanding amounts will appear.

Cash flow

Insert dates from the specific date you want to start with and the date you want to finish with. All payments will be shown as they should have been paid to your company. Please observe that this list has deducted already made payments registered in the system.

List cancelled bookings

This report will show you all cancelled bookings. The report can be sorted by departure date (insert from and to date) or/and date of the cancellation. If both fields are left empty all cancellations will be shown. The report can further be sorted by product and account 2 (project).

Please observe. If the report is sorted by product or account 2 no A la carte/dynamic bookings that has been cancelled will appear on the list. A warning text in red will appear on the header of the report. This only applicable if you are using the A la carte/dynamic booking module.

Travel VAT

This report gives you an overview of how much in Travel VAT will be payable for each product. If you use different VAT sums, the report will show the various VAT sums that you are using. Travel VAT is registered when payments are booked in the system. You can use two different ways of reporting VAT;

TOMS. Travel VAT as a percentage of your revenues. When you are building projects you can decide which VAT sum is applicable for the project. VAT sums are added in the function system parameters (see instructions system parameter/travel administration).

Margin VAT. The VAT is calculated from your costs. You have the possibility to connect different VAT sums to different sums. For further instructions please see calculations (amend project/travel administration).

Overview payments with credit cards

This report will show all payments made to the credit card account.

Send payment receipt by e-mail

This function allows you to send payment receipt by e-mail to those who has a registered e-mail address. The payment receipt is an e-mail copy of the confirmation with a headline saying that it has been sent as a confirmation of payment, and where paid amount and remainder to pay is made clear.

Choose from which payment date the receipt will be created. Default value is yesterday's date, which means that payments with yesterday's payment date and later will be processed.
NB that the search is based upon the date stated as day of payment, not the date when the payment is registered.

A payment receipt is only sent in case of a new payment since previous payment receipt.

A payment receipt is only sent to those who haven't departed the day when the receipt is created.

As a standard the payment receipt will not be sent to reservations with Agent invoice. If you want to send to them as well, tick "Include Agent invoice" above the "Continue" button.

Age-divided balance list

This list show how much that has not expired from the total amount per day from the bookings, expired the last 7 days, expired the last 8-21 days, 22-42 days and further back in time.

If date is entered in step 1, it will only show bookings from that date in the report.

Normally the functions for payment reminders are used instead of this report.

Account per project

This report show the accounts indicated for each project. The report sorts by date of departure and thereafter by project.

You could indicate date or period of departure. The value that will show in advance will be projects from the current day and ahead.

It is possible to limit the report with projectID.

Accounts receivable per client

Insert **client number** to receive a summary of accounts receivable connected to the client.

Report sales by another group company (only when using Enterprise module)

The report shows the sales done by an administrator connected to another company code in the enterprise company structure than what the project belongs to.

The report is found under Finance and is only visible if having access to the Enterprise module.

Choose To and From dates for departure.

A group authorized person can see all bookings sold by another group company. If you belong to another department/company you can only see the bookings belonging to that department/company.

The list sorts by production company, sales company, departure date and projectID.

You can close the formatting of currency, to more conveniently copy to Excel and make calculations there.

No status handling is in the list, this is fetched e.g. after performed production month.

UK government report

This report shows information about bookings, payments and customer details to facilitate reporting to UK government.

The report shows bookings in the selected date of departure and / or date of booking band. You have to select a band for at least one of these two.

If you also include cancelled bookings the report will show the cancellation date as indicator for cancelled bookings.

Content Management

WYSIWYG Editor

Editor. Hold the cursor on each function in order to see the text and the description. Most of the functions you will recognise from the Windows office environment.

Style. You do not need to choose a style sheet, this is already created when you are starting new documents.

Paragraph. If you want to create headers in your text, use this function. Push the arrow to see what options you have.

External link: Find the button "external link" in the editor (below and to the left). A window will be displayed "Hyperlink". In the first window choose http://. In the second window write the address you want to link to.
If you want the page to be opened in a separate window (the visitor will not leave your page) choose "blank". Click on insert and the link is created. A word (ex. hotel Palma) can be used to create the link. This word will appear in blue and underlined so that it is recognized as a link.

Internal link. Leave the first window empty (with http://). Paste the internal link into the window in order to create an address internally.

Link to additional reading. If you want to create an internal link, just copy the link displayed on all documents.

Categories

If you are using the standard Travelize web design, categories will be displayed as the left menu board on your start page. Categories can be used for different purposes:

- Used to group destinations together (Spain, Italy etc). When clicking a category connected destinations will appear (Spain - Mallorca etc)
- Used as a general information header (general conditions, Incentives etc).

A category page can also contain text and pictures but does not include logic to present packages (as destination pages does)

Within all functions in Content Management you will see the search box. You can search a content by adding a text or the ID number of the page. Every page created and saved in Content management will receive an ID number.

By clicking the link show all, all pages will be displayed.

The link add category is used when you want to create a new page.

You will find a detailed description of all fields and functions if you go to destinations and click on the help button. You can always make a print out on the help text.

When you have saved a category page and continues to add destination pages, the categories will be displayed. By ticking the box a destination page will be connected to the category. It is possible to tick more than one category thus being able to connect a destination to more than one category.

Destinations

This is where you create new destinations or update existing ones.

Push the link add new destination and start creating a destination document.

Below you will find a description of each header/function when working with a content document.

Destination. Enter the name of the destination. The name will be displayed as a header on the webpage. E.G. If you enter the name Palma this name will appear as a header on the destination webpage.

Product code. The product code is the code that connects the webpage with the booking system. By entering a product code the system knows where to find the bookable tours saved in the reservation system. Please observe that the product code needs to be the same as the product code entered into the reservation system (case sensitive).

Active. For the document to be published on your website it needs to be active. inactivate the document by unticking the checkbox.

Hierarchy in menu. If you want a certain hierarchy of your destinations (same for categories, hotels etc) you have to replace the default number 5 with 1 (to displayed as the first of all pages).Note that you have to do this to all pages/documents. If you do no enter a number the system will always place the latest page created on the top.

Project. This function may not be displayed in your system. Used by companies using group functions. By connecting a project and a password to this webpage you have created a page that only can be accessed by those persons entering the password. A group can book their tour on this webpage without allowing other people to do the same. If this function should be of interest for you, please contact Travelize support.

Password. See above.

Categories. The categories that you have chosen to publish are shown here. You can either tick one of the categories or choose to connect this destination to several categories.

Properties. If you have the sales module you will be able to use properties on all pages that your create. Properties are used to optimize your web pages for the major search engines (Google etc).
-The headline or Meta Tag is the main description of this page (Ex. Holiday at Belle Helene St George North Corfu).
-Description. You will add more information here about the destination.
-Key words. Gives you the possibility to add several words to describe the destination.

Show hotel. This function is used when you want to display several hotels together with the reservation information on the same destination page. By ticking the box and adding the same product code on the hotels you want to display, the system automatically shows the correct information. For further assistance please contact Travelize support.

Pictures. These functions are used differently by operators depending on web design and the amount of pictures used in the layout. If you are going to use more than one picture on each page contact Travelize support as adoptions to the page will be necessary.

Main picture. Normally used to display the main picture on the top of the webpage. Select a picture in the scrollbar.

More pictures. Depending on web design more pictures are used. The location on the webpage is decided by design.

Picture slide show. You can create a slide show by using this function. The first step will be to create a folder (see instructions in Pictures). The folder contains the pictures you will use for the slide show. Select a folder in the scrollbar. The slide show is presented on the webpage with a symbol (camera). The client can push the camera in order to see the pictures.

Pictures are stored and amended in the function pictures. You will find more information about pictures and functions by reading the support manual there.

PDF document. You can add a PDF to the webpage. Select the PDF in the scrollbar. To enter PDF documents in to the database please see instructions PDF documents.

Text 1. This is where you add text to the webpage. You have an editor at the top of the text area.

Editor. Hold the cursor on each function in order to see the text with the description.

Special functions:

Link to additional reading. If you want to create an internal link you can copy the link displayed on all documents. Following is the way to create a link:

External link: Find the button "external link" in the editor (below and to the left). A window will be displayed "Hyperlink”. In the first window you will choose http://. In the second

window you will write the address you want to link to.
If you want the page to be opened in a separate window (the visitor will not leave your page) please choose "blank". Click on insert and you have created a link. A word (ex. hotel Palma) can be used to create the link. This word will appear in blue and underlined so that it is recognized as a link.

Internal link. Leave the first window empty (with http://). Paste the internal link into the window in order to create an address internally.

You can connect a child document (a document linked to the destination document) by clicking on "new child document". A child document will appear as a link on the destination page and by clicking on the text a new window will appear. You can use a child document for displaying excursion, useful information, programs etc.

You will find the child document function in the main menu (where all your destinations are listed). At the right hand side you will find the symbol +. Push the sign to create a new child document.

Hotel

The Hotel function in Content management is also used by the reservations system to insert the name of the Hotel. To build a webpage for a hotel, do as follows. Please note that if you are using hotel **attributes** (table with information about the hotel i.e swimmingpool etc) you also have to enter these in the function attributes (see separate instruction attributes/content management).

Note. Many functions described below are dependent on the setup of the system. Functions are described in general and the usage depends partly on webdesign and specific client configuration. Read it carefully before you start entering hotels.

Start the process by pushing the link **add new hotel**.

Hotel. Insert the name of the hotel for the reservation system. Only fill in the name of the hotel if you are using it for booking purposes.

Hotel code. This is used when loading a project series in the reservations system. A hotel code should be short and easily recognisable. For usage in the reservation system see instructions (load projects/travel administration).

Product code. This is used for operators selling multiple hotel alternatives at a destination. By entering a product code this hotel will be shown on the destination page with the same product code. To build a destination please see destinations/content management. To display multiple hotels the function "show hotel" box must be ticked on the destination page (see destination help bubble)

Hotel address. Enter the address and it will be shown on the page. Please note that the hotel address will not be displayed as default on the page. The design has to be adopted by

Travelize. Contact Travelize support if you would like to activate this function.

Active. For the document to be published on your website it needs to be active. Inactivate the document by unticking the checkbox.

Hierarchy in menu. If you want a certain hierarchy on your webpage you can use this function (no 1 out of 10 pages). If you do not enter a number, the system will place the page you're currently building as the last page entered.

Project. Is normally not displayed in normal systems set up. Used by companies using group functions. By connecting a project and a password to this webpage you have created a page that only can be accessed by those persons entering the password. A group can book their tour on this webpage without allowing other people to do the same.

Password. See above.

Hotel classification. Used to define a classification of each hotel. The classification can appear as stars or any other symbol of your choosing. If you want to add a + sign to the stars, tick the box

Categories. The categories that you have chosen to publish are shown here. You can choose one or more categories to the same hotel.

Properties. See destinations for detailed instructions.

Supplier. Normally not displayed in the standard set up. If you choose a supplier here you have connected this hotel to a certain supplier. This function is used by operators that are sending hotel requests to suppliers. It can also be used to give suppliers access to room list and room allotment. For operators using multiple suppliers to the same hotel you will connect a certain time period with a supplier (do not connect the supplier here). To read instructions please see add room allotment/travel administration.

City. Normally not displayed in the standard set up. Used by operators selling hotels on request. If you choose a city, the hotel will only appear if you choose this particular city in the reservation process. To add cities to the system please see instructions in price database/travel administration.

Extra text. This is used to display extra text information on the webpage for the hotel. Extra text can be used for highlighting information or as **please note** information. Location of extra text depends on web design and if activated.

Attributes. Attributes gives you the possibility to add a table with information and displayed on the hotel page. You will add attributes of your choice in the function attributes. Choose yes or no and if needed add extra information in the text field.

Main picture. Normally used to display the main picture on the top of the webpage. Select a picture in the scrollbar.

More pictures. Depending on web design more pictures can be used. The location on the webpage is decided by design.

Picture slide show. You can create a slide show by using this function. The first step will be to create a folder (see instructions in pictures). The folder contains the pictures you will use for the slide show. Select a folder in the scrollbar. The slide show is presented on the webpage with a symbol (camera). In order to see the slide show, viewer will push the camera.

Text 1. This is where you can add text to the webpage. You have an editor at the top of the text area.

Editor. Hold the cursor on each function in order to see the text with the description.

Click on add to save the information. If the page is active the information is instantly shown on your webpage.

Attributes

Attributes are used to create tables with information on websites. A table with attributes is used for hotels and golf courses where the same information appears for all hotels/golf courses. How the table is designed depends on your web design.

How to create attributes:

Attribute. Write the name of the attribute here. Examples of attributes are for a hotel reception, pool etc.

Type. Choose type (at present hotel or golf course).

Active. Appears only as an attribute if active.

Click **Add** to save attributes. The attribute has now been added to the list of attributes.

Add Hotel

Here you can add Hotels.
First choose what kind of hotel you want to add (Internal, HotUsa or JacobOnLine)

Example:

Choose Hotel system: JacobOnLine

State Hotel Id (If you use **Edit JacobOnLine** you use the same Hotel Id when you add prices for rooms.)

Fill in name and description and save the hotel. See also Hotel in the Travel Administration section.

Other pages

This is used for pages such as the start page, about us, travel conditions etc.

News

Here you can enter news on your website. This will become automatically become inactive after a period of time. Pictures can be used instead of text.

News can be used in different ways in your design, such as to
1. Display news on the start page. Enter a short text into the field "main text". The text will appear on the start page (individual setup for each client). By adding a date into the date field you can choose publishing date of the news page you are adding.
Please observe that No 2 is only for clients with newsletter function.

Offers

You can set packages to be on offer through entering the following information on the package:

Fill in the field "For offer set priority...". All values above 0 will be regarded as on offer. Offers will normally be displayed in ascending order on the value you set this field to (depending upon how your design has been set up).

You can also enter a text that will be displayed in connection to the package name on the offer page.

If you would like to change the price, you set the new price directly on the package. This will not affect already made bookings, unless you rebook it.

You can amend the offer status in two ways:
Enter the package in Travel administration and Amend package.
Through the mass project update function in Travel administration.

Pictures

The picture library is your storage space and your manager for all your web pictures. Please observe that names of files and pictures that you are adding must only contain ordinary letters (a-z, A-Z and 0-9). Here you can:

Download pictures to the database. Please note that if you have many pictures ask Travelize support for advice.

Create folders with pictures.

Delete and move pictures.

How you manage your pictures:

Delete. Tick the empty box in front of the folder/picture and push delete. A warning will appear and if you are sure push yes.

Copy and move. If you want to copy a picture from one folder to another, tick the empty box in front of the folder/pictures. The library will appear and you decide where you want to move the picture to. The same principle is used when moving a picture. Choose move instead of copy.

Change name. Tick the empty box in front of the folder/picture and tick the name link. Change the text and continue.

Thumbnails. Tick the empty box in front of the folder/picture and push thumbnails. Pictures will be shown as thumbnails and gives you a nice overview of the content in this folder.

Upload document. You can up load a single document/picture by clicking the function upload. The picture you want to up load has to be stored on your local disc. Choose the picture and push add.

Create new folder. To create a file system in your picture database you can use this function to create folders.

Picture slide show

If you want to present more pictures on your destination/hotel page you can use the function **picture slide show**.

A slide show consists of several pictures. You need to group them into a folder (see instructions pictures and how to create a folder with pictures).

Use the scrollbar to find the folder of your choice. The name of the folder will appear in the window. Push add to save settings.

A slide show is marked on your webpage with a camera symbol. By pushing the camera a new window will open up and the client can go forward and backwards by using the arrows. You can also set the slide show to change pictures automatically. The client can then decide picture change speed.

Add PDF document

If you want to add PDF's to certain web pages you will need to download these into the database. Search for the PDF in this function and push continue.

FTP account for uploading pictures etc.

When uploading many pictures at one time, it's easier and faster to do it via a FTP program than using the built-in functions in the system.

If you don't have a FTP account for pictures uploading, you can order it via the support.

You need a FTP program to upload pictures, e.g. http://www.cuteftp.com/cuteftppro/.

Information for search engines

In addition to the information that is displayed on your web pages, search engines will look for some other more hidden information. To position yourself on Google and other search engines you should therefore fill in this extra information which is easily done from the Content Management of each page.

TITLE is what is displayed at the top of the page after the web browser's name (e.g. Microsoft Internet Explorer). The words that you have here are very important for search engines. It should be 6-8words. Please note that visitors will see these words so what you write must make sense! Your front page is the most important but also remember to write good title on your destination pages as you cannot include everything on your start page.

DESCRIPTION is a short introduction that should consist of approximately 20 words describing the web page. It will be displayed by many search engines so write it in a way that it make sense to humans as well!

Please note - do not spam the search engines with writing the same word many times. This can get your site black listed by search engines!

Market (add on module)

Newsletter in HTML format

Create Template
Click Create Template to create a template for your newsletters. The template can be used to send all of your newsletters.

1. Name the template.
2. Create the HTML template in the field "Newsletter HTML".
3. Write a text in the field "Newsletter text", this text will. appear to those who have chosen not to receive HTML e-mails.
4. Tick Active if you want to enable the template to be chosen when creating a newsletter.
5. Press Save.

To change a template, click the name of the template in the list.

Create Newsletter
Click Create newsletter.

1. Name the newsletter.
2. If desired choose a template. If you choose a template any html/text already written will disappear.
3. Create the newsletter in the field "newsletter HTML".
4. Write a text in the field "newsletter text", this text will appear to those who have chosen not to receive html e-mail.
5. Tick Active if you want to enable the possibility to choose the template when creating a newsletter.
6. Press Save.

To change a newsletter, click the name of the newsletter in the list.

Dynamic content
To include certain dynamic contents in the newsletter there are some tags to use. This enables the possibility to include customer specific information in the newsletter:

Customer information:
[#FIRSTNAME#] [#LASTNAME#]
[#ADDRESS#]
[#ZIP#] [#CITY#]
[#CUSTID#]
Link to newsletter: [#LINKTONEWSLETTER#]
Cancel newsletter: [#CANCELNEWSLETTER#]
Your offers: [#OFFERS#]

If you put these tags in the newsletter the tags will be changed to information from the system before it's sent to the customer's e-mail address.

Send Newsletter
Click "Send newsletter".
Step 1:
1. Choose a group or click manual search for receiver.
A manual search enables the possibility to make a free search in the customer register for a person you want to send to, e.g. all customers in Gothenburg. If you have a multilingual language system you can choose to send to persons with a certain language selected.
2. Compose a headline, which will be shown in the headline of the newsletter.
3. Choose the kind of newsletter you want to send.

Step 2:
The number of receivers is shown and any doubles have been deleted.
Click "Send Newsletter" to send the letter. A check box appears, click "OK" to send letter.

Step 3:
The number of newsletters is shown.

List of receivers

If you want to exclude persons from your sending, use this list to exclude.

Customer categories

Here you can register customer categories. A customer category can be used to group different target groups and an active customer category can be chosen in the booking and when you add a customer. You can also use the customer category when doing different circulars.
Code. State a code for the category (e.g. Senior). To **amend** a category, search in the scroll list and get the category you want to amend. Modify the information and press Add.

Description. Describe the customer category (e.g. the Senior club xx).

Active Tick this to make the category active and visible on the places where it can be chosen. Press Add.

Marketing codes

Marketing codes can be used in the system to help you improve your marketing activities. You can enter as many marketing codes as you wish. Marketing codes will be visible in the booking engine and a code can be connected to a booking. Codes are connected to stat views and there are different ways to extract information.

How to register marketing codes:

Code. Insert a code for marketing activity (AD for advertisement as an example)

Description. Use the description to describe the code in more detail.

Active. Activate the code by ticking the box.

Add

Lead generation

Travelize marketing is developed to boost your sales. Therefore a lot of functions are focused on functions to generate leads.

Newsletter function. You can send electronic newsletter to leads and clients that have been registered in your customer database. Newsletter is an effective and cheap way of keeping in contact with your target group. Resent research gives that as much as 10% of receivers are clicking through and reading the newsletter.
A newsletter function is part of the marketing module and one way to attract new e-mail addresses is a discreet news letter signup when potential clients are leaving your website.

Contact us. A contact form is part of the website and is very easy to use for potential clients.

Order brochure. Clients can order your brochures directly from the webpage. Brochure orders are saved in the customer database and is automatically distributed to the function new brochure orders where you can print labels.

Recommend a friend. Potential clients are searching for information about tours not only on your website. An interesting destination can create interest and by adding a link to each page **recommend a friend** it is easy for clients to send the link to this page to friends or relatives.

Search engine optimization. Travelize will help you optimize your site so that when potential clients are looking for a destination, name etc will find your website as well.

Merge letters

Instead of printing your brochure orders on labels you can choose to merge them as letters. For instructions see **new brochure orders**

Discount rules

This functions will make it possible for you to add different discount rules to your system without programming by Travelize. All rules made here are connected to package sales (ALC can not use this function).

Product. If the discount shall be valid for a certain product please add the product code. If the discount should be valid for more than one product code you can add more but you need to separate them with a semicolon (;).

Hotel. If the discount is valid for a certain hotel please add the ID number of the hotel. ID number is shown after the name of the hotel. If more hotels shall have the discount, separate by semicolon. Leave empty if the discount is not ruled by any particular hotel.

Discount start date. Date when bookings will start receiving a discount (booking date).

Discount end date. Date when bookings will end receiving a discount.

Departure date start Date. The departure date when a discount will be given.

Departure date end Date. The last date of departure where a discount will be given.

Minimum duration. Add a number of the travel length if discount only is valid when travelling a certain number of days (3, 7 etc).

Maximum duration. Add a number of the travel length if discount is only valid when travelling a maximal number of days.

Campaign code. Add a code if the discount will be valid by inserting a campaign code when booking.

Discount Name. Insert a name that identifies the discount rule.

Comments. Add a comment to the rule.

Discount fixed amount. Insert a numerical value if you want to give a discount in a fixed amount (100, 200 etc)

Discount percentage. Insert a percentage value if you want to give the discount as a percentage ((20, 25 etc).

Type. You can choose between several types. A type defines who will get the discount (per reservation, per traveller etc).

Active. Must be ticked to activate the discount. To make inactive untick the box. Companies with the enterprise module can also add a company name to be able to activate discounts for a certain company.

Add allotment based additions

To be able to connect an addition with a package you will need to insert them here.

Type. Choose between mandatory and a free addition. A mandatory addition means that you have to select one and only one when booking.

Description. The name of the choice (Cats theater, Formula 1 B tickets etc).

Text 1 and text 2. If you need to describe the addition with some additional text. Only used in special web designs.

Commission based. If the choice also renders commission for agents tick the yes radio button.

Optional choices

Choose if the optional choice shall be compulsory or optional for the customer.

Type reference

Add a type reference to be able to select one when adding an addition. You can choose to add only one or add several to be able to connect different choices to different types.

Write the name of the type in add type.

Choose if the type will be used for choices or for the calculation functions (see amend project to read about calc functions).

Add price

In the price table you can add prices to a hotel/room in different ways. Below you will find an instruction how to add information and create a bookable resource.

Hotel. Choose the hotel that you want to add a price to. If you do not find the name here please go to content management/hotel and enter the name of the hotel there.

Room type. Choose room type.

Period from and to date. Add dates in from and to.

Weekdays. If prices are different weekdays and weekends you can choose to enter a price for certain days during the week.

Currency. Choose your sales currency.

Price per person or per room. Choose how you want the price to be calculated. If you choose price per room the system will calculate per night and room.

Cost. Your cost of purchase.

Board. Not used at the moment.

Minimum number of persons. Set at 1 as default. If you want to add a price aimed towards groups you will enter the minimum number of persons here (ex 10 will allow clients to get the price if 10 clients are booking).

Open for. Not used.

Children discount. Add the amount as a numerical value (-200).

Maximum age for child discount. Max age to receive a child discount.

Infant price. Price for infants 0-2 years.

Cost child discount. Your discount cost.

Price extra bed. Add the discount allowed for sleeping in an extra bed. Must be a numerical value (-200).

Number extra beds. The number of extra beds allowed.

Cost extra bed. Your extra bed discount cost.

Price empty beds. The surcharge you are adding towards the client.

Cost empty bed. Your purchase cost for the empty bed.

Supplier. Select a supplier in order to activate request mail functions.

Currency. Select your purchase currency.

VAT. Write the VAT amount (20) that shall be calculated as part of the sales price.

Multilanguage version (add on module)

Multilanguage version

Multilanguage system. Travelize is available in many different language versions. Both the internal dialogue and the external (customer dialogue) are available in different languages. It's also possible to use the same database but to govern the language choice to a specific user.

Homepages can also be published in a **master language** that then can be translated into other languages. The administration is easy while the master document is the uppermost level and thereafter the language documents follows in a tree structure.

Translation matrix

The translation matrix is used in the Multilingual module
(extra module).

The system can translate some short texts - such as project name, destination list and other similar texts - based upon this translation matrix.

Choose in the list which language you want to edit to reload the list with the desired language.

As a standard the whole list of words is shown. To restrict it you can search for a part of the word. The search will then be made both in the original text and in the translated text.

Type the word/words to be translated and what this/these should be translated to in each language.

Have in mind that some short words which can be included in longer words should be printed with a space, a point or something similar. E.g. "car ".

Be sure not be logged in as admin to test this on the site, as an administrator you always keep your admin language. Instead you open a new window in Explorer, i.e. don't press CTRL + N in your first frame or anything like that, as you are not logged in in this new window.

Translation of some longer texts

With this translator function a text will be translated in its entirety. It is used mostly for texts in multi company version for payment information etc.

Enterprise module (add on module)

Enterprise solution

The Travelize Enterprise solution is made for companies with business in more than one country or with subsidiary. By using the Enterprise module several companies can work in the same database but with none or limited access to each others information. HQ functions can of course access all parts of the system and reports are there for a total overview.

The advantages are several. Finance functions can be centralised, packages from several companies can be presented on a common web portal, commission calculation (intra company pricing), statistics and access levels for many users.

Multi language web sites with master documents is another feature of the enterprise module as well as automatic pricing functions in several currencies.

A very important advantage of the enterprise module is **shared allotment handling**. Hotel allotment can be used by many companies without the need to redistribute rooms to other parts of the company.

Contact Travelize for a detailed description of functions and whether they will serve your needs.

Report for everything sold by the company for all companies in the group

The report gives you a list of all reservations in a chosen interval of reservation dates, which reservations that has been sold by the own company, grouped per producing company.

If there is a payment registered, paid amount is shown, payment day and account are shown.

Report for everything sold by the company for all companies in the group.

Inter-company reconciliation

This report show, for a chosen period, the payments made by an administrator who by the payment occasion belongs to another company than the company that the booking belongs to.

State to and from date for the period in which payments should be listed.

The report shows with ID1 the company which the booking belongs to and with ID2 the company which has registered the payment. Notice that there can be several different payments which been made by other companies or which lie outside the chosen date interval. This can be seen by the difference between total amount and remainder to pay, given in two separate columns.

Cabin module (add on module)

Standard periods of cabin reservations (additional module)

Here you can state the standard periods used for cabin prices. These will be used when creating new cabin prices.
It's possible to have several different groups of standard periods and to choose which one to be used when creating the prices.
A no longer inactive period shall be set to Active 0.

Cabin prices

Choose a cabin and possible a standard period. You write a part of the name of the cabin and matching cabins are shown. Click to choose.
The same technique is used for the standard period.
Price rule: Choose rule to be used for price calculation.

Price 1 - 4: These are the price components that may be used depending on which price rule you used.

Cost amount 1-4: Here you can state the purchase price corresponding to the prices 1-4.

Sale status: Free sale if the number is unlimited, At request if you don't have allotment, In allotment if you have an available cabin.

Duration: State the durations available for the cabin.

Minimum and maximum length: State the shortest respectively the longest rental period in days.

Day of changeover: State the weekday for changeover when dealing with week rentals.

From and including - To and including: State the period the price will apply to. This is set from standard periods initially but may be changed.

Comments: Space for comments. These comments will only be visible in the cabin administration. To add an extra price line, click the picture: 
at the bottom to the right. Changes or deletions and similar are saved first when you press Update.

Cabin prices

Choose a cabin and possible a standard period. You write a part of the name of the cabin and matching cabins are shown. Click to choose. The same technique is used for the standard period.
Price rule: Choose rule to be used for price calculation.

Price 1 - 4: These are the price components that may be used depending on which price rule you used.

Cost amount 1-4: Here you can state the purchase price corresponding to the prices 1-4.

Sale status: Free sale if the number is unlimited, At request if you don't have allotment, In allotment if you have an available cabin.

Duration: State the durations available for the cabin.

Minimum and maximum length: State the shortest respectively the longest rental period in days.

Day of changeover: State the weekday for changeover when dealing with week rentals.

From and including - To and including: State the period the price will apply to. This is set from standard periods initially but may be changed.

Comments: Space for comments. These comments will only be visible in the cabin administration. To add an extra price line, click the picture:  at the bottom to the right. Changes or deletions and similiar are saved first when you press Update.

Booking in external systems (add on module)

Rules for connecting projects to external flights

Here you can state rules for when transports added in Travelize should get price and place supply in an external system like GDS the reservation systems at low price companies.

The transport is added as usual in Travelize. **The following information about the transport is important**:
* Main transport ID
* Departure date
* Departure time
* IATA-code departure airport
* IATA-code arrival airport

In the connection table the following should be stated:

main transport ID: This is the connection to the transport series that should be connected against an external check of price and place.

Flight: This is the flight code (e.g. SK528) that you should look for.

Direction: State if it's a out or in flight.

Max price: State the maximum price in the main sales currency accepted by this flight, taxes included. If the price is higher a supplement is given, according to the rules for how this supplement should be calculated set in your system.

Time tolerance State the amount of minutes before / after the time, stated on the transport, that search will be made.

Show alternatives: Tick if alternative flights should be suggested if not the main flight is available.

Alternative flights: If alternatives should be visible, state these alternatives here separated by semicolon.

Active: Tick this to state the rule as active.

External system:
Norwegian=NORWEGIAN

List external flight bookings

Here you can see a list of all external flights. You can search by external or internal booking number, booking date and name of external system.

Checklist for Project bookings against external flight systems

This report shows project bookings connected to an external flight system.

This report can be based on departure date and / or booking date in open intervals (e.g. it's enough to state a start date for booking date to show all booked from that date and later). The list can be restricted by part of product code, and if only active bookings are listed.

If the booking is available in an external flight system, the external booking number is shown far to the right. Bookings with no stated value here, has not been booked against the external flight system.

A maximum of 3000 bookings at a time are shown in the report.

List external flight bookings (add on module)

Here you can see list of all external flights. You can search by external or internal booking numbers, booking date and by external systems. You can also choose if you want to see ticketed, unticketed
or all flights.

Further you can choose paid, not paid or all.

Search for/choose active departure and arrival airports

In the GDS module is a list with over 10 000 IATA codes for airports, countries and cities. These are used for searching for available flights in the GDS systems to/from these cities.

You can search by stating part of a country, part of a city or part of the IATA code for the airport. Notice that countries and cities are stated in English in the database.

To make a translation of the name of a country or a name of a city click the country or the name of the city and fill in your translation.

Tick that the airport is active as a departure airport respectively as a arrival airport. Then update to save the changes.

Notice that some GDSs are not able to handle searching by airport codes and then most cities has a so called metropolitan city code; activate this to obtain the result from the GDS. If you are using some kind of external hotels the metropolitan city code will activate a search for hotels in the chosen city.

Seating (add on module)

Seating management

This is where you will create a seating plan for your transport.

Name. Give the transport/seating plan a name. For coaches a coach size can be used (49:er) and for a flight the flight model (MD 80).

Number of spots. Insert the total number of seats that you want to use for this transport.

Continue and the seating plan will now appear.

You can now start to insert seating information.

Name. The default value is numerical but you can change the name of the seat to something else (a, b, c etc).

Row number. A row can consist of several spots/seats. You decide how you want to build this up. By inserting the same row number on 6 spots/seats you have created a row of 6 spots.

Place in row. To make a nice graphical view of your seating plan you will leave some spots empty to create aisles etc. To create a row with one spot empty to simulate an aisle do as follows. Give the first spot 1, second 2 and skip 3. continue with the fourth 4 and the fifth 5. You have now a row consisting of 4 seats with one empty for the aisle.

Floor. You can also configure a transport with 2 floors. If you are only using one floor insert 0 in this field. If you are using two floors start with 1 for the first floor and 2 for the second floor.

Comply with. Some Travelize clients prefer not to display the whole seating plan in the online booking engine. They are only displaying the seating plan for internal users. You can however give the client the choice to make a seating wish. Comply with is used to give the transport a section deviation. Forward can be 1, middle 2 and back 3 as an example. By giving each seat a number you have marked this seat as complies with forward, middle and back.

Empty box. If you mark this box a special colour will appear in the seating plan for this particular spot. This can be used to mark seats that are reserved for guides or seats that will not be seated due to other reasons.

Add to save your seating plan.

Connect seating/coach to transport

Use the copy function if you already have connected a transport to a coach/flight seating plan.

To create a new connection do as follows:

Choose the transport that you would like to connect to a seating plan. Please observe that you need to connect the seating plan to both the outbound and inbound transport if you are using seating for both directions.

Coach id. Select the seating plan that you want to connect with this transport.

Coach name. Give the transport a name. Each connected transport must have a unique name.

Push add to save the connection. The seating plan will now appear when you start booking on the transport.

Add/amend seating

Clients that are booked on the transport will appear in this list. Already seated clients will have the spot marked. Clients that have made a wish (if you are using comply with) will be marked with their wish. Transport comments are also displayed on the list.

To do a seating:

Choose the transport in question.

Do the seating by inserting a spot/seat number to each client.

Push add to save your seating plan.

Amend seating on your transport

You can amend information on your seating plan. Amend one or more fields and push update to save your changes.

Hotel Administration (add on module)

Add room (only in the Hotel system module)

This function is for systems where you want to add own hotels and their rooms. Here you can add information about each room, e.g. room 1, room 2 etc.

Room division (only in the Hotel system module)

Here you can administer the room division manually. This enables the possibility to state which rooms a booking uses.