Back Of House

General functionality

The System management Interface functionality changes from consultant to consultant, based on the user rights that are defined by the system administrator. The system also caters for franchise company access in the same or a different currency. The Front End can display different content that is managed by the franchisee and will be displayed depending of the browsers location in the world (managed through a fairly accurate IP number database system).

1. To Do screen / Welcome screen

This is the heart of the System management Interface (SMI) for the consultants/users. The contents of this screen depends on the log-in. Administrators have the ability to see anybodies To Do list or all To Do items across the company in one screen.

a) *Enquiries table*

Original Web Enquiries and Enquiry Register requests are presented in a list with the following functionality:

- **Read**: The enquiry details can be viewed in a new tab or pop-up (depending on browser settings) with *name, email, work phone, mobile, date added, time added* (QLD time), *earliest departing, latest departing, number of travelers and a free form text field.* In this Tab/Pop-up the handling consultant can also add any number of comments in a *Consultants Notes field*.
- **Product**: The name of the product originally enquired about or 'NOT SURE' option. Product name links directly to quoting screen for this product.
- **Sendmail:** Quick access to main contact details. Email address links to default email program (i.e. Outlook) and opens new mail screen with predefined subject line and body text.
- **Snooze:** Ability to snooze this enquiry for 24, 48 or 72 hours.
- **Delete:** Tick box to mark the enquiry for deleting
- **Follow Up:** Tick box to mark this enquiry for follow up after getting back to enquirer.

- **Booked:** Tick box to mark this enquiry as booked – no further follow up sales call required.
- **Assigned To:** Drop down list of all sales representatives to assign the enquiry to another sales person. This will bring up this enquiry on their To Do List.

b) *Follow Up*

After processing enquiries marking for follow up in above enquiries table they are presented after 3 days (default) in a list. An override function link will present all follow ups without waiting 3 days. This table has the following functionality:

- **Read**: The enquiry details can be viewed in a new tab or pop-up (depending on browser settings) with *name, email, work phone, mobile, date added, time added* (QLD time), *earliest departing, latest departing, number of travelers and a free form text field.* In this Tab/Pop-up the handling consultant can also add any number of comments in a *Consultants Notes field*.
- **Send Follow Up:** Quick access to main contact details. Email address links to default email program (i.e. Outlook) and opens new mail screen with predefined subject line and body text.
- **Snooze:** Ability to snooze this follow up for 24, 48 or 72 hours. To be presented in follow up again.
- **Product/Quotes:** This column has two functions. It displays the name of the original product and the Quoting number for the original quote from the enquiry handling process.
  The name of the product links to this product's quoting screen and simultaneously opens this product's allocation screen in another window (dual monitors are of great advantage). Any number of alternative quotes can be made and sent to the enquirer. All created quotes will be saved against this enquiry and listed in this column. Any of the listed quotes can be viewed and turned into an invoice with a single click.
- **Not Booked:** Tick box to mark this follow up as not booked to remove from further follow ups.
- **Booked:** Tick box to mark this follow up as booked – no further follow up sales call required. The invoice (that was created from the quote of choice will be linked to the enquirer's contact details.

c) ***Deposit Due***

Simple list of all deposits due.

- **Snooze:** Ability to snooze this reminder.
- **Paid:** Tick box to mark this reminder as paid.

d) ***Full Amount Due***

Simple list of all full amounts due.

- **Snooze:** Ability to snooze this reminder.
- **Paid:** Tick box to mark this reminder as paid.

e) ***Cancellation List***

Numbered list of all travellers that don't fulfil the minimum requirements for travelling. Pax appear here if the full amount wasn't been paid yet or booking form with minimum info wasn't filled out yet. This table has the following functionality:

- **Name:** Name and date added.
- **Booking number:** Booking number with link to full details of vthis booking.
- **Create Reminder Email:** Link to internal reminder email system with predefined text and subject line. Editable.
- **Snooze:** Ability to snooze this reminder.
- **Paid:** Tick box to mark this reminder as paid.
- **Paid:** Tick box to mark this booking for deleting.

f) ***Air Ticket Due***

List of all pax that have been marked with requirement to order air tickets with GDS.

- **Not Required:** Ability to remove this reminder if arrangements have changed.
- **Ordered:** Tick box to mark this reminder as ordered.

g) ***Docs Due***

List of all pax that are ready to travel and their documentation needs to be prepared and printed.

- **Booking number:** Booking number
- **Date:** date of travel.
- **Name:** Name of Pax
- **View:** Link to group overview Front of File (FOF) with all Pax of this group in one screen. In FOF the documentations person will find a link

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to all voucher documents for this trip. Where possible the vouchers have been pre-filled with known details.
- **Ordered:** Tick box to mark this reminder as ordered once all docs were produced.

h) *Supplier Remittance Due List*

Simple list of all suppliers that need to be paid as marked on files.
- **Name:** Link to Excel spreadsheet on local machine or local network where supplier remittance calculations get handled.
- **Snooze:** Ability to snooze this reminder.
- **Paid:** Tick box to mark this reminder as paid.

i) *Booking Form Due List*

Simple list of all Pax that still need to be fill out their mandatory details in the online booking form as per their invoice.
- **Name:** Name of pax.
- **Booking Number:** Booking number with link to all booking information edit screen (INF screen)
- **FOF:** Link to group overview Front of File (FOF) with all Pax of this group in one screen.

2. Log Out

Simple link to log the current user out of the SMI properly

3. Group Calendar

Link to private group calendar based on Google calendar (free Google account necessary for editing)

4. Enquiry Register

For all enquiries other than web enquiries the consultant is required to enter the enquiry into the system manually. This screen has two components, a 'minimum info' part and a 'helpful further info' part:

a) *Minimum Info*

All fields are mandatory and will show up in the To Do list Enquiry table information.
- **Product**: Drop down menu of all products in database
- **Email address**: Starting to enter an email address here automatically searches the entire contacts database. If a match comes

up this match can be selected which will auto-fill all available information. This can be a real time saver.

- **First Name:** Starting to enter a name here automatically searches the entire contacts database. If a match comes up this match can be selected which will auto-fill all available information.
- **Surname:** Starting to enter a name here automatically searches the entire contacts database. If a match comes up this match can be selected which will auto-fill all available information.
- **Mobile:** mobile number (will later be available for SMS messaging function)
- **Home Phone:** main landline phone number
- **Notes:** Simple text field for free form info
- **Enquirer type drop downs:** Two types of adults, two types of kids and infants.
- **Departing From:** Drop down of departure ports (important for packages that include flights)
- **Earliest Departure Date:** Sets the earliest desired travel date
- **Latest Departure Date:** Sets the latest desired arrival home date
- **72 Hour Hold:** Allocates a passenger for 72 hours for a fee. This triggers a follow up in the To Do screen after 3 days to follow up if the pax wants to go ahead. Holding fee is non-refundable.
- **Button "Save Minimum Info:** To save the mandatory info to the assigned consultant's Enquiry Table in the To Do List for further processing.
- **Button "Save Minimum Info And Quote:** To save the mandatory info to the assigned consultant's Follow Up table in the To Do List for further processing and simultaneously opening the quoting screen for the selected product to start quoting straight away.

b) *Helpful Further Info*

These fields can be filled out to any extend. No field is mandatory. Info collected here will help further down the track for booking information. This is helpful if no quote is required and a direct booking needs to be entered. Available Fields are:

- **Middle name:**
- **Address 1:**
- **Address 2:**

- **Suburb:**
- **State:**
- **Country: :** Drop down
- **Work phone:**
- **Departure Date:**
- **Passport Number:**
- **Passport Country of Issue:** Drop down
- **Issue Date:**
- **Expiry Date:**
- **Date of Birth:**
- **Place of Birth:**
- **Occupation:**
- **Next of Kin:**
- **Ticket Delivery Address**
- **Same as above...** tick box
- **Address 1:**
- **Address 2:**
- **Suburb:**
- **State:**
- **Country:** Drop down
- **Length of oversized luggage**: ft and inches
- **Other Notes:** Free text field that will appear in booking info.
- **Button "Save ALL Info (including changes to minimum above):** To save all changes to entire screen to go to the assigned consultant's Enquiry Table in the To Do List for further processing.

5. Travel Packages

This links to a list of all products separated by location/category. All products that allow full allocation (freehold or owned) have an allocation button:

a) *Allocation Screen for accommodation type products:*

Accommodation type products are displayed in a grid with dates in vertical order and beds in horizontal order. Depending on this product's settings the screen groups beds by different rooms if necessary. The following elements/functions are on this screen:

- **Product Name**: name of product
- **Show From**: Beginning of desired date range.

- **Show To:** End of desired date range.

  PLEASE NOTE: Depending on number of rooms and Internet Connection some large amount of data might slow the system down and only a limited date range can be displayed. In most accommodation cases and with Broadband this should not affect useful date ranges.
- **Allocation Waiting List:** This area temporarily holds Pax for swapping purposes. In some instances Pax that have been started in a booking information screen will sit on hold in this list until properly allocated to a specific bed/date range.
- **Data Grid:** Each grid cell stands for a bed allocation on a specific date. Unallocated cells have the letter "I" and the letter "S" in it. The link on the letter "I" opens up the INF screen to start the booking sheet. The link on the letter "S" marks the cell for swapping. Swapping is the process where clicking on the "S" on two different cells will swap their pax details. The same applies for swapping between a cell and a pax in the Allocation Waiting list. If the Pax is occupying a bed for more than one day only the earliest cell has the "I" and "S" that will act for the entire duration.
- **Data Grid Colour Coding:** The cells are also colour coded for a quick overview on booking payment status. Red colour stands for 'no payment received', orange colour stands for 'deposit received' and green colour stands for 'fully paid'.
- **Save button:** Any changes to this screen will only be saved to the database when this Save Button is pressed.

6. Retrieve QI

This links to the Quote/Invoices retrieval screen

a) *Retrieve Quotes and Invoices*

This screen lets you browse through all saved quotes and invoices in the system. The screen opens in the default view with the following functionality:

- **Find**: Type a search term into this box and select from the adjacent drop down menu by what category you want to search. You can search in the following categories:
- **Quote/Invoice table** with the following columns**:**
  - Quote/Invoice ID: Original Quote ID

- Itin ID: Itinerary ID for combined allocation packages (several allocations in different products on single trip)
- Quote: link to view that quote
- Invoice: link to view that Invoice
- Consultant: Consultant's name
- Passport Name: Pax name as in passport (no nicknames here)
- Phone: Pax phone number
- Email: Pax Email address
- Issue Date: Date of quoting

7. Booking Forms

This links to the Booking Forms retrieval screen.

a) *Manage Booking Forms*

This screen lets you browse through all saved quotes and invoices in the system. The screen opens in the default view with the following functionality:

- **Search**: Select from the drop down menu if you want to search by first name or surname and put the desired name in the adjacent search box.
- **Booking Form table** with the following columns**:**
  - ID: the booking form ID
  - DEL: tick box to mark booking form(s) for deleting
  - Surname: The listed surname links to the corresponding booking form.
  - Firstname: first name for identification
  - Dep date: Departure date for further identification as some Pax book several times over the years as well as pax with the same names (i.e. for John Smith the departure date will narrow the search down – if there are two John Smith on the same date you will have to look both up to identify by other booking details)

8. FOF

The Front Of File (FOF) section is designed to create a meaningful overview over a group that travels together. This can be a family where one invoice is sent to a group of people or it can be a group of friends/associates which all receive their own invoices. For the group of friends it is possible that they have different travel arrangements (use different airlines to the destination) and might have different travel packages at the destination. What connects them is that they spend the same time together as a group at the same destination/package.

a) ***Search for FOF***

This screen is for finding a travel group's Front Of File.

- **Search**: Select from the drop down menu if you want to search by name or booking number and put the desired text in the adjacent search box. In the next drop down menu you can narrow the search down to a specific product.
- **FOF Search Results Table**: The search results are displayed in a table. All individual Pax are listed here grouped by travel dates. The table has the following information and functionality:
    - Date: Travel date for group
    - Name: Full name of pax
    - Booking Number: Booking number of Pax. All booking numbers in this group are identical except for the last two digits which indicate the individual status. A number ending in 01 indicates the group 'leader'/ main contact person.
    - Package: Travel package name
    - View: Links to the appropriate Front Of File (FOF) screen with an overview over all important travel related details.

b) ***FOF screen***

This screen is the travel consultant's overview for getting a group 'on the road'. All important details that need to be fulfilled for a group to depart are collected in this screen. From here the consultant has a quick access to the important related screens and a 'one glance' overview about a trip status. This screen has the following details and functionality:

- **SURNAME / FIRST NAME:** This column holds the Pax name, email address, home, work and mobile number for quick follow up. Clicking on the email address brings up the default email program's new message screen, ready to send a message to that address.
- **ALLOCATION USER ID:** A fancy name for 'booking number'. Clicking the booking number will open the INF screen (which is the edit screen for all the Pax travel details).
- **INSURANCE ISSUED:** A tick box indicates that the travel insurance for this pax was issued. An 'EDIT' link will open a free text form that can hold insurance details information.

- **SUPPLIER COMMENTS LOG:** An ‘EDIT’ link will open a free text form that can hold comments and messages from the supplier regarding this trip.
- **CLIENT COMMENTS LOG:** An ‘EDIT’ link will open a free text form that can hold comments and messages from the travel consultant regarding this group’s trip.
- **ITINERARY:** A ‘SHOW’ link will open a summary of the itinerary (for trips with multiple product allocation i.e. hotel and bus)
- **financials/payment history:** This column holds the financial information for this Pax for this trip. The overview is as in the following example:

  FA: $5000.00 *(this is the FULL AMOUNT/invoice ‘total’ figure)*
  Due: 01-01-2010 *(this is the due date for paying bthe full amount before the trip)*
  Status: Incomplete *(this indicates in red if the full amount has not been paid or green if fully paid)*
  Dep: $500.00 *(this shows the sum of all partial payments. Please note that all partial payments get registered in the INF screen)*
  Due: 15-12-2009 *(this is the deposit due date)*
  Status: paid *(this indicates if the deposit minimum requirements are fulfilled red=no, green=yes as above)*

  Outst.: $4500.00 *(this is the final amount minus all partial payments)*
- **AIRFARE:** The ‘SHOW’ link opens the airfare part of the INF screen. It can be ignored for trips that don’t require airfares.
- **FILE TO DO LIST:** The ‘Show’ link opens the To Do screen (welcome screen) and displays only outstanding to do items (as per To Do description above) for this group.
- **SUPPLIER PAYMENTS :** The ‘SHOW’ link opens a pre-defined Excel spreadsheet on the local machine or local network for supplier remittance calculations.
- **FORWARD FIGURES:** The ‘Show Fwd Figrs’ link opens a management report with an overview of predicted future cash-flow.
- **B/FORM:** The ‘Show’ link opens this pax’ associated booking form with signed disclaimer etc.
- **TICKET ORD:** When tickets need to be booked/ordered through the GDS this column holds a quick reminder for the status.

- **SQ WAIVER:** Singapore airlines requires a special email/fax prior to travel if the Pax travels with oversized luggage. The red 'SEND' button will open a send mail window with the necessary info already filled out. After sending the button will turn green.
- **DOCS:** The 'Do Now' link will open a screen with a list of all necessary vouchers for this pax' trip. In this screen the documentation consultant can collate, edit and print all necessary voucher documentation. A tick box indicates that the documentation has been done.
- **CONS FINAL FILE CHECK**: A tick box indicates that the consultant has checked that all mandatory details for this trip are OK.

Below the top table are the following other areas:

- **Flight PNR:** This area has one free text area for pasting each Pax' GDS generated flight PNR into.

- **Additional Itinerary items:** In this area the consultant can add additional services to any or all of the group's Pax. Predefined extras that have Vouchers associated will automatically be added to the DOCs area.

- **Button:** 'SAVE ALL CHANGES ON THIS PAGE' button commits any changes to the database.
- **Group View**: This links to a simplified group view for this group's trip.

9. To-Do-Lists

a) *Drop Down menu*

With the necessary administrator rights you can view individual consultants To Do lists or all To-Do items combined in one big list.

10. Mgmt Reports

Available Management reports. Please note: All reports can be copied into Excel easily. The following reports are available by default:

a) *Quotes per product*

b) *Quotes by consultant*

c) *Invoices by product*

d) *Invoices per consultant*
e) *Conversion rate*
f) *Conversion rate by consultant*
g) *Quick Quote popularity*

11. Supplier Reports

Available Supplier reports. These reports are used to communicate activities to the suppliers. Please note: All reports can be copied into Excel easily. The following reports are available by default:

a) *Package payment status*
b) *Weekly allocation*
c) *Annual allocation*