Book and coordinate supplier services

D2.TTA.CL2.04

Trainee Manual

Specialist centre for foods, tourism & hospitality

Book and coordinate supplier services

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Trainee Manual

Australian Aid
asean
William Angliss Institute
Specialist centre for foods, tourism & hospitality

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The Association of Southeast Asian Nations (ASEAN) was established on 8 August 1967. The Member States of the Association are Brunei Darussalam, Cambodia, Indonesia, Lao PDR, Malaysia, Myanmar, Philippines, Singapore, Thailand and Viet Nam.

The ASEAN Secretariat is based in Jakarta, Indonesia.

General Information on ASEAN appears online at the ASEAN Website: www.asean.org.

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Introduction to trainee manual

To the Trainee

Congratulations on joining this course. This Trainee Manual is one part of a ‘toolbox’ which is a resource provided to trainees, trainers and assessors to help you become competent in various areas of your work.

The ‘toolbox’ consists of three elements:

- A Trainee Manual for you to read and study at home or in class
- A Trainer Guide with Power Point slides to help your Trainer explain the content of the training material and provide class activities to help with practice
- An Assessment Manual which provides your Assessor with oral and written questions and other assessment tasks to establish whether or not you have achieved competency.

The first thing you may notice is that this training program and the information you find in the Trainee Manual seems different to the textbooks you have used previously. This is because the method of instruction and examination is different. The method used is called Competency based training (CBT) and Competency based assessment (CBA). CBT and CBA is the training and assessment system chosen by ASEAN (Association of South-East Asian Nations) to train people to work in the tourism and hospitality industry throughout all the ASEAN member states.

What is the CBT and CBA system and why has it been adopted by ASEAN?

CBT is a way of training that concentrates on what a worker can do or is required to do at work. The aim is of the training is to enable trainees to perform tasks and duties at a standard expected by employers. CBT seeks to develop the skills, knowledge and attitudes (or recognise the ones the trainee already possesses) to achieve the required competency standard. ASEAN has adopted the CBT/CBA training system as it is able to produce the type of worker that industry is looking for and this therefore increases trainees’ chances of obtaining employment.

CBA involves collecting evidence and making a judgement of the extent to which a worker can perform his/her duties at the required competency standard. Where a trainee can already demonstrate a degree of competency, either due to prior training or work experience, a process of ‘Recognition of Prior Learning’ (RPL) is available to trainees to recognise this. Please speak to your trainer about RPL if you think this applies to you.

What is a competency standard?

Competency standards are descriptions of the skills and knowledge required to perform a task or activity at the level of a required standard.

242 competency standards for the tourism and hospitality industries throughout the ASEAN region have been developed to cover all the knowledge, skills and attitudes required to work in the following occupational areas:

- Housekeeping
- Food Production
- Food and Beverage Service
- Front Office

- Travel Agencies
- Tour Operations.

All of these competency standards are available for you to look at. In fact you will find a summary of each one at the beginning of each Trainee Manual under the heading ‘Unit Descriptor’. The unit descriptor describes the content of the unit you will be studying in the Trainee Manual and provides a table of contents which are divided up into ‘Elements’ and ‘Performance Criteria”. An element is a description of one aspect of what has to be achieved in the workplace. The ‘Performance Criteria’ below each element details the level of performance that needs to be demonstrated to be declared competent.

There are other components of the competency standard:

- *Unit Title:* statement about what is to be done in the workplace
- *Unit Number:* unique number identifying the particular competency
- *Nominal hours:* number of classroom or practical hours usually needed to complete the competency. We call them ‘nominal’ hours because they can vary e.g. sometimes it will take an individual less time to complete a unit of competency because he/she has prior knowledge or work experience in that area.

The final heading you will see before you start reading the Trainee Manual is the ‘Assessment Matrix’. Competency based assessment requires trainees to be assessed in at least 2 – 3 different ways, one of which must be practical. This section outlines three ways assessment can be carried out and includes work projects, written questions and oral questions. The matrix is designed to show you which performance criteria will be assessed and how they will be assessed. Your trainer and/or assessor may also use other assessment methods including ‘Observation Checklist’ and ‘Third Party Statement’. An observation checklist is a way of recording how you perform at work and a third party statement is a statement by a supervisor or employer about the degree of competence they believe you have achieved. This can be based on observing your workplace performance, inspecting your work or gaining feedback from fellow workers.

Your trainer and/or assessor may use other methods to assess you such as:

- Journals
- Oral presentations
- Role plays
- Log books
- Group projects
- Practical demonstrations.

Remember your trainer is there to help you succeed and become competent. Please feel free to ask him or her for more explanation of what you have just read and of what is expected from you and best wishes for your future studies and future career in tourism and hospitality.

Unit descriptor

Book and coordinate supplier services

This unit deals with the skills and knowledge required to Book and coordinate supplier services in a range of settings within the travel industries workplace context.

Unit Code:

D2.TTA.CL2.04

Nominal Hours:

30

Element 1: Identify suppliers of products and services

Performance Criteria

1.1 Identify suppliers used by the host enterprise

1.2 Identify products and services purchased from suppliers

1.3 Identify operational requirements relating to the selection and use of suppliers

1.4 Locate and become familiar with sources of information and resources, in relation to suppliers, services and products

Element 2: Identify client booking requirements

Performance Criteria

2.1 Create client file

2.2 Identify specific client requirements for supplier services

2.3 Determine and select most appropriate supplier to meet identified client requirements

2.4 Prepare and supply quotation to client

2.5 Confirm authority to proceed from client

2.6 Obtain payment from client

2.7 Update client file

Element 3: Request products and services from supplier

Performance Criteria

3.1 Forward request/s to selected supplier/s

3.2 Comply with organisational requirements in relation to placement of requests for bookings of products and services

3.3 Supply, clarify and confirm all information related to required products and services

3.4 Inform suppliers of required response to requests from supplier/s

3.5 Lodge or confirm formal and official booking/s

3.6 Seek, and lodge requests with, alternative suppliers as required

Element 4: Maintain client file

Performance Criteria

4.1 Record lodgement of booking in client file

4.2 Capture and store relevant records in client file

4.3 Issue notification and documents to client

4.4 Monitor client file

4.5 Meet requirements of scheduled future action

Element 5: Process final booking details for products and services

Performance Criteria

5.1 Notify supplier of required adjustments to initial booking

5.2 Pay supplier in accordance with established and/or agreed terms and conditions

5.3 Update client file

5.4 Inform supplier of final client information

Assessment matrix

Showing mapping of Performance Criteria against Work Projects, Written Questions and Oral Questions

The Assessment Matrix indicates three of the most common assessment activities your Assessor may use to assess your understanding of the content of this manual and your performance - Work Projects, Written Questions and Oral Questions. It also indicates where you can find the subject content related to these assessment activities in the Trainee Manual (i.e. under which element or performance criteria). As explained in the Introduction, however, the assessors are free to choose which assessment activities are most suitable to best capture evidence of competency as they deem appropriate for individual students.

		Work Projects	Written Questions	Oral Questions
Element 1: Identify suppliers of products and services				
1.1	Identify suppliers used by the host enterprise	1.1	1,2	1
1.2	Identify products and services purchased from suppliers	1.2	3,4	2
1.3	Identify operational requirements relating to the selection and use of suppliers	1.3	5,6	3
1.4	Locate and become familiar with sources of information and resources, in relation to suppliers, services and products	1.4	7	4
Element 2: Identify client booking requirements				
2.1	Create client file	2.1	8,9	5
2.2	Identify specific client requirements for supplier services	2.2	10	6
2.3	Determine and select most appropriate supplier to meet identified client requirements	2.3	11	7
2.4	Prepare and supply quotation to client	2.4	12	8
2.5	Confirm authority to proceed from client	2.5	13	9
2.6	Obtain payment from client	2.6	14	10
2.7	Update client file	2.7	15	11

		Work Projects	Written Questions	Oral Questions
Element 3: Request products and services from supplier				
3.1	Forward request/s to selected supplier/s	3.1	16	12
3.2	Comply with organisational requirements in relation to placement of requests for bookings of products and services	3.2	17	13
3.3	Supply, clarify and confirm all information related to required products and services	3.3	18	14
3.4	Inform suppliers of required response to requests from supplier/s	3.4	19	15
3.5	Lodge or confirm formal and official booking/s	3.5	20	16
3.6	Seek, and lodge requests with, alternative suppliers as required	3.6	21	17
Element 4: Maintain client file				
4.1	Record lodgement of booking in client file	4.1	22	18
4.2	Capture and store relevant records in client file	4.2	23	19
4.3	Issue notification and documents to client	4.3	24	20
4.4	Monitor client file	4.4	25	21
4.5	Meet requirements of scheduled future action	4.5	26	22
Element 5: Process final booking details for products and services				
5.1	Notify supplier of required adjustments to initial booking	5.1	27	23
5.2	Pay supplier in accordance with established and/or agreed terms and conditions	5.2	28	24
5.3	Update client file	5.3	29	25
5.4	Inform supplier of final client information	5.4	30	26

Glossary

Term	Explanation
Auxiliary	Additional products and services appropriate and used to enhance another product or service
Blog	A website containing a writer's or group of writers' own experiences, observations, opinions, etc., and often having images and links to other websites.
Client	Customer or person responsible for arranging travel for another.
Colleague	A fellow worker or member of a staff, department, profession
Communication	The imparting or interchange of thoughts, opinions, or information by speech, writing, or signs
Consultation	Seeking input, advice and suggestions from others
CRS	Central Reservation System
Data	Piece of travel related information
Dispatch	To send
Document	Any paper or electronic form of ticket, voucher or travel related information
Dossier	Document containing all the detailed information regarding a travel activity
Efficiency	How well something is done with effective use of resources
Enterprise	Organisation or business
E-ticket	Electronic ticket
ETA	Estimated time of arrival
ETD	Estimated time of departure
GDS	Global Distribution System
Inbound	Travellers coming into a country

Term	Explanation
Mark-up	Profit margin identified by difference between price quoted to customer and that quoted by suppliers
Merchant Fee	Fee charges by credit card company
Non-air	Any travel that is land or sea based
Nett or Net	Financial amount after direct expenses or taxes have been deducted
Network	Gathering of people for a particular purpose
Outbound	Travellers leaving a country
PDS	Product Disclosure Statement
Preferences	Experience your customer is seeking
Preferred agreement	A formal commercial agreement between a supplier and a travel agent which facilitates the payment of extra commission and other benefits by the supplier to the travel agent in exchange for the travel agents agreement to sell the suppliers product.
Press	Any form of public media
Pro-forma	Template used to collect or record information in a structured and set way.
Quotation	A statement of information and prices relating to travel activity
Supplier	Also known as operator. Any organisation that provides travel related products or services.
Tariffs	Prices
TIM	Travel Information Manual
Transfers	Method of transportation used of getting from one destination to another
Wholesaler	Travel organisation that packages different supplier services

Element 1:
Identify suppliers of products and services

1.1 Identify suppliers used by the host enterprise

Introduction

A key part of any travel agent's tasks is to provide a range of tourism products and services to their clients.

In most cases, these tourism products and services will not be provided by the travel organisation themselves but different suppliers. Your role will be to deal with a range of different suppliers of tourism products and services and then present options to prospective clients.

This manual will explore in detail the importance and nature of the relationship between travel and tourism staff and suppliers of tourism products and services.

Types of suppliers of tourism products and services

One of the most important aspects of providing tourism information to customers is to firstly understand who supplies tourism products and services.

When compiling supplier information for your product knowledge data bases, it is essential to identify the different types of businesses / suppliers in which your potential customers may use.

Whilst gathering information from all tourism suppliers is impossible and impractical, identifying commonly used tourism providers enables you to gather information relating to the products and services they provide.

In addition it enables you to ensure that the information that you have gathered is accurate and up to date.

Depending on the types of tourism offerings provided by your organisation possible suppliers in which you may seek product information from includes, but not limited to:

- Airlines
- Other travel suppliers
- Accommodation
- Attractions and theme parks
- Tour operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesale
- Retail Travel Agents

- Local, regional and National information services
- Meetings and Events
- Corporate Agents
- Ministries of Tourism
- Tourism boards
- Industry authorities
- Industry associations.

The breakdown of suppliers identified in the categories above will be identified in more detail in this section.

Airlines

Airlines own the planes and sell seats to all sectors in the travel industry. They do this via a Computer Reservations system (CRS) such as Galileo, Sabre and Amadeus.

They also sell seats via the Internet and via the phone to the public. Airlines negotiate rates with Retail Agents, Wholesalers, and Corporate Agents who then take a commission from the airline sale. Some Airlines have a Wholesale division which sells directly to Retail agents.

Other travel suppliers

These include but are not limited to:

- Cruise operators
- Railway operators
- Bus lines
- Car rental businesses
- Limousine hire
- Taxis.

Suppliers and providers of support and ancillary services

This includes:

- Travel insurance providers
- Finance providers
- Currency exchange
- Conference and similar venues
- Interpreters.

Accommodation

This sector includes but not limited to:

- Hotels and motels
- Guest houses
- Bed and breakfasts
- Caravan parks and camping grounds
- Resorts
- Time share properties
- Apartments, villas and cottages
- Conference and exhibition centres.

Attractions and Theme Parks

This sector includes but not limited to:

- Museums and galleries
- National parks, wildlife parks and gardens
- Theme parks
- Heritage sites and centres
- Sport and activity centres
- Aquarium and zoos.

Tour Operators

A tour operator typically organises sightseeing tours and accommodation in a particular destination or region. They act as a middle person between the Wholesaler and the Principal or Supplier of the product

Examples of businesses include Trafalgar Tours and Contiki.

Visit:

- www.trafalgartours.com
- www.contiki.com

Inbound Tour Wholesaler

An Inbound Tour Wholesaler packages products to form a trip for an overseas market travelling to a specific country.

Outbound Tour Wholesaler

An Outbound Tour Wholesaler negotiates product from International Suppliers for clients in a specific travelling to an international destination. They approach airlines, hotel, local tour operators, cruise companies, car rental companies and rail companies to obtain wholesale rates which are then on-sold to the public via the Retail Travel Agents

Examples of businesses include Tempo Holidays, Peregrine Adventures and Creative.

Visit:

- www.tempoholidays.com
- www.peregrineadventures.com
- www.creativeholidays.com

Retail Travel Agents

A Retail Travel agent is the go-between between the client and the Wholesaler. It is the Retail agent who obtains all the relevant details from a client to enable them to make a booking through a Wholesaler. All this information is then finalised and paid for to the Wholesaler. Both the Retail agent and the Wholesaler make commission from the booking.

Examples of these businesses include: Flight Centre, STA and American Express

Visit:

- www.harveyworld.com
- www.flightcentre.com
- www.statravel.com

Local, regional and national information services

These information services exist to assist the public and Travel agents in obtaining information on a particular region from the experts. This can be at a local, regional or national level.

These bureaus can be independent bodies or come under the support and direction of the respective Ministries of Tourism, which will be identified later.

These bureaus take calls from Travel agents as well as the public to help in promoting their region. They have wholesale divisions and all staff are experts in their area.

All these locally based Tourist bureaus have a fantastic website with a wealth of information and products to extend one's knowledge.

At a regional level there may be Information Centres, which provides a local booking service for accommodation in the area. They also provide pamphlets on local attractions which inform visitors of points of interest in the area.

Meetings and Events

This sector has been one of the fastest growing within the tourism and hospitality industry.

These companies organise meetings, conferences and major events by booking flights, accommodation, tours and the meeting facilities for their client and their guests.

Large Corporate Companies have a separate department set up specifically to cater for the conference and event market. An example of this type of Company is HRG (Hogg Robinson Group) which is a UK based company specialising in corporate travel and having a division specifically setup for conference and event bookings. There are also independent companies that only specialise in Meetings and Events, such as The Event Factory and C1 Events.

Ministries of Tourism

Each country within the ASEAN region will have dedicated government ministry specifically focused on the tourism industry. Their role is to regulate and manage the industry.

A Ministry of Tourism is normally responsible for the formulation of national policies and programmes and for the co-ordination of activities of various governments and the private Sector for the development and promotion of tourism in the country.

The Ministry may co-ordinate special initiatives including:

- Selecting and managing heritage sites
- Dedication and allocation of government funding to tourism initiatives
- Providing information on news laws and regulations
- Establishing service excellence awards
- Publishing and managing tenders for tourism projects.

The ASEAN region, whilst working collectively to achieve a primary purpose of attracting tourism to the region as a whole, each participating government will also have their own websites and departments in which to collect information. They have been identified below.

BRUNEI
Tourism Development Division
Ministry of Industry and Primary Resources
Jln. Menteri Besar, Bandar Seri Begawan, Brunei Darussalam
Tel. (673-2) 382822 Fax. (673-2) 382824
Email: info@bruneitourism.travel
Website: http://www.bruneitourism.travel/

CAMBODIA
Ministry of Tourism
3, Preah Monivong Blvd, Phnom Penh, Cambodia
Tel. (855-23) 213911 Fax. (855-23) 426107/217503
Email: dgpro@camnet.com.kh
Website: http://www.tourismcambodia.com/

INDONESIA
Ministry of Culture and Tourism
Jl. Medan Merdeka Barat 17, Jakarta 10110, Indonesia
Tel. (62-21)3838157 Fax. (62-21) 3849715
Website:
http://www.budpar.go.id
http://www.my-indonesia.info

LAOS
National Tourism Authority of Lao P.D.R.
Lane Xang Avenue, P.O. Box 3556, Vientiane, Lao P.D.R.
Tel. (856-21) 212248 Fax. (856-21) 212769/2127910
Website: http://www.tourismlaos.gov.la/

MALAYSIA
Ministry of Tourism
Menara Dato' Onn
Putra World Trade Center, 50480, Kuala Lumpur, Malaysia
Tel. (603) 2693 5188 Fax. (603) 269 0207/2693 0884
Email: tourism@tourism.gov.my
Website: http://www.tourism.gov.my

MYANMAR
Ministry of Hotels and Tourism
No. 77-91, Sule Pagoda Road, Yangon, Myanmar
Tel. (95-1) 285689 Fax. (95-1) 289588/254417
Email: dht.mht@myanmar.com.mm / mtt.mht@mptmail.net.mm

Website: http://www.myanmar-tourism.com/
http://www.hotel-tourism.gov.mm
http://www.myanmar.com/Ministry/Hotel-Tour

PHILIPPINES
Department of Tourism
DOT Building, T.M. Kalaw Street, Agrifina Circle, Rizal Park
Manila 10004, Philippines
Tel. (632) 523 8411 Fax. (632) 521 7374
Email: deptour@info.com.ph
Website: http://www.wowphilippines.com.ph/

SINGAPORE
Singapore Tourism Board
Tourism Court, 1 Orchard Spring Lane, Singapore
247729
Tel. (65) 736 6622 Fax. (65) 736 9423
Email: stb_sog@stb.gov.sg
Website: http://www.yoursingapore.com/

THAILAND
Tourism Authority of Thailand
1600 New Phetchaburi Road
Makkasan, Ratchathewi, Bangkok 10400, Thailand
Tel. (662) 250 5500 Fax. (662) 253 7437
Email: center@tat.or.th
Website: http://www.tourismthailand.org

VIET NAM
Viet Nam National administration of Tourism
80 Quan Su Street, Hanoi, Viet Nam
Tel. (84-4) 822 8744 Fax. (84-4) 942 4115
Email: binhvnat@hn.vnn.vn
Website: http://www.vietnamtourism.com

Tourism Boards

In some countries such as in Singapore, a ‘tourism board’ have been established. It is called the Singapore Tourism Board. The primary task of STB was to coordinate the efforts of hotels, airlines and travel agents to develop the fledging tourism industry of the country.

Later, STB began to initiate new marketing ideas to promote Singapore's image aboard. The board created the Merlion, a symbol based on a Singapore mythical legend that became an icon of the Singapore destination. The board also has been providing travel agent licensing and tourist guide training.

STB actively promotes the development of infrastructure, including the building of hotels and tourist attractions such as the Jurong Bird Park and Sentosa which now becomes a popular resort island for both tourists and local visitors. The board also market the city as a convention venue and organised events to attract visitors.

Activity 1- Identify tourism suppliers

For each type of tourism business listed below, provide examples of suppliers in which you would request information from.

Type of tourism businesses	Names of organisations
Airlines	
Other travel suppliers	
Cruise operators	
Railway operators	
Bus lines	
Car rental businesses	
Limousine hire / taxis	

Type of tourism businesses	Names of organisations
Travel insurance providers	
Finance providers	
Currency exchange	
Conference and similar venues	
Interpreters	
Accommodation	
Hotels and motels	
Guest houses	
Bed and breakfasts	

Type of tourism businesses	Names of organisations
Caravan parks and camping grounds	
Resorts	
Time share properties	
Apartments, villas and cottages	
Conference and exhibition centres	
Attractions and theme parks	
Museums and galleries	
National parks, wildlife parks and gardens	
Theme parks	
Heritage sites and centres	

Type of tourism businesses	Names of organisations
Sport and activity centres	
Aquarium and zoos	
Tour operators	
Inbound Tour Wholesaler	
Outbound Tour Wholesale	
Retail Travel Agents	
Local, regional and National information services	
Meetings and Events	
Corporate Agents	

Type of tourism businesses	Names of organisations
Ministries of Tourism	
Tourism boards	

1.2 Identify products and services purchased from suppliers

Introduction

As mentioned in the previous section, there are endless tourism suppliers that can be sought when identifying products and services to potential customers.

In many cases the supplier is the actual provider of products and services, whilst in other cases, such as wholesalers, they may be intermediaries who coordinate services by end suppliers.

As with most travel arrangements, a range of tourism products and services will be booked as part of the whole package or experience

Regardless of who is the end supplier, this section will identify the different products and services that are sought by customers and subsequently purchased from suppliers.

Common products and services

Whilst each potential customer will have their own preferences for products and services, commonly requested tourism products and services required include, but not limited:

- Flights
- Car hire
- Transfers
- Accommodation
- Entertainment
- Tours
- Cruises
- Entrances to attractions and sites
- Workshops, exhibitions, functions and events
- Insurance.

The products, services and information sought regarding the above will be explored in more detail over the next pages.

Details of common products and services purchased through suppliers

All products and services booked, via a supplier or operator, are generally confirmed verbally and subsequently in writing via a booking confirmation advice. Booking confirmations will vary in type, content and format depending on the supplier or operator and the specific product and services.

The information reflected on booking confirmations may include the use of standard travel industry abbreviations and codes. In addition, abbreviations and codes that are supplier/operator specific may also appear. Depending on what has been booked, this is the information that you would expect to see, by product type, on a confirmation invoice to a travel agent for each product type.

Flights

- Types of airlines
- Destinations and routings
- Class of travel
- Departure and return dates
- Specials
- Fare validity – for sale and for travel dates
- Air fare per person
- Taxes per person
- Frequent flyer information.

Car hire

- Names of companies – Avis, Budget, Hertz etc.
- Vehicle group or type – compact, midsize, group C etc.
- Transmission – manual or automatic
- Pick up and drop off dates, times and location
- Rates
- Rental Inclusions – mileage, additional drivers, insurances, taxes
- Any additional local payments for additional services e.g. GPS.

Transfers

- Date, time and location of transfers
- Type of transfer – seat in coach, private transfers, limousine etc.

Accommodation

- Name of accommodation and location
- Room type and bedding configurations
- Check-in and check-out dates
- Total number of nights
- Any extras or inclusions such as meals, transfers etc.
- Cost per person per night and total amount for the stay.

Entertainment

Types of entertainment including:

- Shows
- Shops
- Nightlife
- Sports and recreation
- Natural attractions
- Man built attractions
- Restaurants.

Tours

- Tour company name
- Tour name, code and duration
- Destinations
- Departure date, time and location/city
- Arrival date, time and location/city
- Rooming details – single, twin, triple
- Inclusions.

Cruises

- Name of the cruise line or company
- Name of the ship
- Name of cruise, including code
- Number of days or nights
- Departure date, time and location
- Return date, arrival time and location
- Cabin type and deck location.

Entrances to attractions and sites

- Types of attractions
- Inclusions in attractions
- Hours of operations
- Costs
- Name of Pass
- Duration and types of pass.

Workshops, exhibitions, functions and events

- Types of event
- Location / venue
- Types of rooms
- Speakers and specialised staff
- Equipment services
- Special event consumable items
- Catering
- Accommodation
- Transfers
- Tourist activities
- Corporate activities
- Special items with corporate branding.

Insurance

- Company used
- Policy type and length of policy
- Type of cover
- Reference to PDS (Product Disclosure Statement).

Activity 2 - Identify tourism products and services

Based on the list of tourism products and services listed above, you are to select one category and conduct research examples of products and services available in your local region that can be promoted to potential clients.

You are to make a 5 -10 minute presentation providing a summary of your findings.

Specific products and services sought by customer, based on needs

On the previous pages, we have explored common products and services that have to be purchased through suppliers. That said, based on identified customer needs, specific products and services may include, but not limited to:

- Adventure holidays, packages and tours
- Snow skiing holidays, packages and tours
- Specific age holidays, packages and tours
- Diving
- Cruising
- Rail
- Coach
- Sporting
- Safaris
- Family
- Overland treks/walking
- Beach
- Camping
- Campervan/car rental
- Wedding ceremonies.

Activity 3 - Identify tourism products and services for specific requests

Based on the list of specific tourism products and services listed above, you are to select one and identify different products and services that can be recommended to clients.

Base you findings on an international customer coming to your country.

1.3 Identify operational requirements relating to the selection and use of suppliers

Introduction

Given that travel organisations will be purchasing tourism products and services from suppliers on a daily basis, it is essential that travel staff:

- Understand the role of suppliers
- Select appropriate suppliers
- Identify operational arrangements with suppliers.

These steps are essential in building strong relationships with suppliers aimed at providing mutual benefit for both parties.

Identify role of suppliers

When developing relationships with various suppliers it is important to understand the role they perform in providing products and services to customers. This will help determine their suitability in providing products and service.

Supplier roles include:

- Selling destinations you need
- Selling transport you require – air, car, rail, coach, cruise etc.
- Selling accommodation style you require – hotel, motel, apartment, resort etc.
- Selling the appropriate level of comfort and inclusions your client needs
- Having competitive prices and offering value for money for your client
- Having a reputation for reliability, efficiency and easy payment
- Provide quality documentation
- Employ helpful and knowledgeable staff
- Pay competitive agent commission
- Have local representation.

Activities in identifying appropriate suppliers

All travel and tourism organisations will need to identify and select suitable suppliers in which to provide tourism products and services for customers.

In many organisations, these relationships have been long lasting, whilst new suppliers will always need to be sourced to meet the individual and ever changing needs of customers.

Therefore activities associated with identifying suitable suppliers include:

- Identifying client requirements in terms of products and services
- Collecting information as to whom provides these products and services
- Identifying suitable suppliers
- Assessing alternatives against the identified requirements for the quotation
- Evaluating the alternatives against the given criteria for the quotation
- Conducting nominated checks, comparisons and evaluations to be made prior to determining supplier to be used
- Accommodating host enterprise requirements in relation to the use of preferred suppliers, providers and carriers
- Aligning with established client preferences and individual client market research data/feedback
- Determine and select suppliers, providers and carriers to be provided as options to the client.

Identify operational arrangements with suppliers

Once suitable suppliers have been identified it is now time to discuss and confirm arrangements and contracts with them.

This is the clarification of the framework for which the partnership will exist.

Operational arrangements include, but not limited to identifying:

- Contractual enterprise negotiated agreements
- Preferred supplier status of companies
- Contra-deal arrangements
- Reciprocal business relationships
- Individual scope of authority for lodging requests, bookings and spending money on behalf of the host enterprise.

Contents of an operational arrangement with suppliers

Whilst the formation and contents of agreements between specific travel organisations and suppliers will be different common elements include:

- Details of the parties
- Subject of the agreement
- Duties of each party
- Scope of authority of each party
- Terms and conditions of bookings
- Terms of deposits and payments
- Commissions
- Cancellation and amendment clauses
- Liabilities and charges
- Duration of contract
- Complaints procedure
- Termination of contract
- Legal jurisdiction and governing law
- Data protection
- Distribution and promotion
- Banking details.

Activity 4 - Research and collect a tourism supplier agreement

You are to conduct research and locate a tourism agreement that may be used to establish a relationship between a travel organisation and suppliers.

If you are unable to obtain an agreement, you are to identify five key points you would insert into an agreement.

1.4 Locate and become familiar with sources of information and resources, in relation to suppliers, services and products

Introduction

Information is a key component of sales and marketing in tourism. Effective information is also a key requirement for the booking and documentation of any tourism product or service.

Finding information and using it effectively to meet the needs of your customers is a key element of working in many tourism industry positions.

Having product knowledge helps to answer customer questions including:

- Where is it?
- How do I get it?
- How long does it take?
- What is it like?
- Is there a good?
- How much does it cost?
- What would you recommend?
- What is the weather like?
- Where can I go to buy?

To assist customers, coordinate the booking and to ensure specific needs are met it is imperative to continually seek knowledge and updates on all products and services offered by various suppliers

One of the most important aspects of any job in the tourism industry is finding information. It is impossible to know everything about the thousands of different tourism products and services.

You can, with experience, build up what you know, and first-hand knowledge is the most valuable of all.

In some jobs you need a broad range of information about multiple destinations and in others you need an in-depth knowledge of one destination.

The underpinning key to information provision is knowing where and how to find the information you need and applying that information effectively to the specific needs of your customer

Direct contact with sources of information

Naturally the best way to gain information is through direct contact with suppliers including:

- Travel suppliers, including carriers, airlines, cruise operators, railway operators, bus lines, car rental businesses, limousine hire, taxis
- Suppliers and providers of support and ancillary services, including travel insurance providers, finance providers, currency exchange, conference and similar venues, and interpreters

- Tour operators and wholesalers
- Travel agencies and associations
- Peak travel bodies
- Government tourism industry bodies and authorities, including domestic and international bodies.

Access information resources

There are endless resources that can be accessed and reviewed that will help identify and explain the endless range of tourism products and services available in the global market.

Information resources	What sort of information can you find here?
Brochures/DVDs	Destinations and product information, packages, prices, booking conditions. Many brochures also provide information on local customs, health precautions, visa requirements, currency, shopping, hints on what to wear.
Hotel and accommodation guides and indexes	Information and contacts on accommodation.
Atlases, maps and encyclopaedias	Geographical and general destinations information.
Travel guides	Destination and product information. (e.g. Lonely Planet, Fodor's, Insight, internet)
Individual timetables	Product and scheduling information, general industry information.
Automated information systems	Varied information
Internal database of product suppliers and their details	List of preferred suppliers Comments made by colleagues. Various documents collected

Information resources	What sort of information can you find here?
Computerised Reservations Systems (CRS)	Almost anything relating to airlines-flight schedules, fares, seating plans, just to name a few. In addition, most CRSs can provide you with a massive amount of other information – location times, daily exchange rates, visa information, and destination information. They also provide a link into the reservations systems of many wholesalers.
Supplier information	This includes information from: • Brochures • Sales kits • Sales representatives • Contracts with suppliers, providers and carriers • Preferred contracts or agreements • Price schedules • Confidential and general industry tariffs.
International airline guides	Comprehensive worldwide air schedules, minimum connecting times, check in requirements, baggage information, airline and city codes, international time calculators, local taxes etc. The main example is the Official Airline Guide (OAG), although its use has been superseded to a great extent by the CRS.
Travel Trade Yearbook	Contacts for hundreds of companies in different sectors of the travel industry.
Travel Information Manual (TIM)/ Travel Trade Visa Guide/ Travel Express Visa Guide	Visa and other statutory requirements for overseas countries. TIM can now also be accessed on the CRS.
Passenger air tariff	Airfare information
Trade press	Industry updates, destination and product information, general news. (E.g. Travel Trade, Travel Weekly etc.)
General print and electronic media, travel magazines and even news bulletins for current issues	General destination and product information. News services can supply very current information on the day to day developments such as flood, social unrest, exchange rates and so forth.
Literature	This includes reference books, magazines and newspapers.
Educationals/product familiarisations	Opportunities to experience products and services first hand.
Networks and contacts	Personal network of contacts, including those within the host enterprise and those external to the business.
Other organisations in the industry	To get information and advice from an organisation who specialise in a particular product or destination.

Information resources	What sort of information can you find here?
The internet, travel websites, travel advisor, blogs	Websites including individual companies, directories, news sites, surveys and research sites A major resource of all types of information destinations, airline, current affairs, hotels, just to name a few. The internet is fast becoming an increasing popular means of booking travel arrangements.
Travel companies product launches, travel shows and information nights	A major way to gain knowledge on specific products with specific travel companies, update you on new product information on the market and to keep in touch with people in the travel industry.
Official country tourist offices, authorities and bureaus	General destination and product information

Activity 5 - Identify sources of tourism information required for a variety of trips

You are to identify the different sources of tourism information that you would require if you were to plan one of the following trips:

- 3 week trip for a family of four persons (parents aged 40-50 with children aged 3&5) to the United States of America. They are interested in seeing key attractions and also age related recreational activities for the children
- 2 week cruise around the Mediterranean for an affluent mid aged couple
- 1 week budget adventure trip in an ASEAN country for a couple aged 25
- Luxury1 week trip to an ASEAN country for a couple aged 60

- Business trip for a group of 5 persons to a major ASEAN city. They need to book a conference room for 10 persons for 4 days and then incorporate sightseeing for a day after business has been completed.

For the purpose of this exercise, the clients come from your own home town.

What are key pieces of information you would gather?	**What sources / resources did the information come in?**

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

Please complete the following activities relating to this Performance Criteria:

1.1 Please complete the following activities relating to this Performance Criteria:

- Activity 1

1.2 Please complete the following activities relating to this Performance Criteria:

- Activities 2,3

1.3 Please complete the following activities relating to this Performance Criteria:

- Activity 4

1.4 Please complete the following activities relating to this Performance Criteria:

- Activity 5

Summary

Identify suppliers of products and services

Identify suppliers used by the host enterprise

- Types of suppliers of tourism products and services
- Airlines
- Other travel suppliers
- Suppliers and providers of support and ancillary services
- Accommodation
- Attractions and Theme Parks
- Tour Operators
- Inbound Tour Wholesaler
- Outbound Tour Wholesaler
- Retail Travel Agents
- Local, regional and national information services
- Meetings and Events
- Ministries of Tourism
- Tourism Boards

Identify products and services purchased from suppliers

- Common products and services
- Details of common products and services purchased through suppliers
- Specific products and services sought by customer, based on needs

Identify operational requirements relating to the selection and use of suppliers

- Identify role of suppliers
- Activities in identifying appropriate suppliers
- Identify operational arrangements with suppliers
- Contents of an operational arrangement with suppliers

Locate and become familiar with sources of information and resources, in relation to suppliers, services and products

- Direct contact with sources of information
- Access information resources

Element 2: Identify client booking requirements

2.1 Create client file

Introduction

Before information can be stored relating to customer enquiries, there are certain preparatory tasks that need to be completed. This involves the identification and preparation of:

- Information recording and storage systems
- Client files.

Types of information recording and storage systems

There are a range of different applications used by travel agents some of which are specific to that travel agent or that chain. Training in the use of back office procedures and software is provided by the business itself or where the system used is linked to a CRS e.g. Cross Check Travel and Galileo, then training is offered by that CRS.

Some systems used by travel agents have the facility to provide an itinerary or quotation which includes the detail of all the products and services required or booked for the customer.

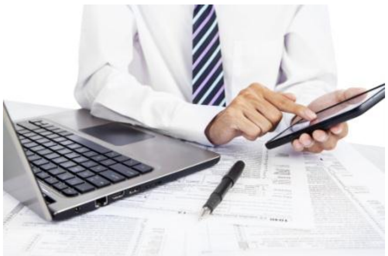
In addition, the system will record or allocate a customer file or reference number and some systems offer the facility to convert a quotation into an actual booking.

Most travel agents use one of the following methods to record the detail of the products and services booked, their status and other relevant customer detail.

- A totally manual system
- A totally electronic system
- A combination of both – most common.

Importance of recording accurate information

It is important that these records be accurately maintained to ensure:



- Efficiency – when referring to the quote
- Effectiveness – when making reservations or changes with suppliers
- Team work – colleagues may need to refer to the quote in your absence
- Profitability – mistakes cost money
- Enhanced customer service.

Benefits of accurately recording information

If you are inundated with requests for quotations it may be possible to:

- Review and prioritise in order of importance
- Second one of your colleagues to assist you
- Reset agreed deadlines with customers
- Bring your situation to the attention of your manager or supervisor.

If you have followed a process of accurately and legibly recording all aspects of the quotation, it will be easy for your manager or colleagues to provide you with assistance.

Create client files

Most travel agencies will establish dedicated client files to record:

- Client detail
- Supplier quotations
- Travel agency quotations.

Regardless of the recording method used, it is essential that all information is recorded in a thorough and accurate manner.

Given that many travel agencies receive many requests for quotations and in addition are required to produce quotations, it is essential that the recording method chosen enables any travel agent staff member, regardless of previous contact with customers, are able to understand the status of clients

Most travel organisations require staff to record notes using only jargon that is generic and that can be understood by the entire team.

In addition, to ensure that staff endeavour to be disciplined in the way they record any information collected or discussed with clients and suppliers at the time that they take place.

Identify client file number

Each client file has a unique reference number, the format of which is enterprise specific.

A client file number is often only allocated (manually or electronically) once a booking has been made and a deposit or some money has been received from the customer.

A similar system, using a unique reference number, is usually employed to record quotations.

The protocols for a quotation reference number are again, enterprise specific.

Generally these customer files/quotation reference numbers are allocated electronically and are recorded using a back-office application such as Cross Check Travel or similar.

Client file details

Travel agents use a client file to record all information in relation to the:

- Client details
- Client requirements
- Information sourced to date
- Information provided to clients to date
- Communication discussions taken place to date
- Travel arrangements booked
- Associated financial transactions relating to that particular file.

Activities associated with creating client files

The activities associating with creating client files includes:

- Preparing paper-based or electronic file
- Establishing and naming file for individual clients
- Incorporating previous client history into file
- Allocating specific agent to handle and deal with client
- Initiating nominated client and file records as required by the host enterprise.

Activity 6 - Research and identify information systems and client files

You are to visit a travel organisation to gain an understanding and briefly outline:

- Information recording and storage systems used
- Types, formats and inclusions of client files

Information recording and storage systems used

Types, formats and inclusions of client files

2.2 Identify specific client requirements for supplier services

Introduction

When a customer comes to book tourism products and services, you must identify their travel requirements which may include:

- Domestic
- International
- Mixture of both.

This will assist you in narrowing down destinations if the customer is requiring assistance in the planning process. It is your job to offer the products that will satisfy your customer's needs. In many cases this will involve offering products and services they have not considered.

Naturally before any quotation can be taken, it is important to:

- Collect client personal information
- Identify the needs of the client.

By collecting relevant information, travel agents can accurately source the most desirable products and services that can be included in a quotation, to reflect their travel needs.

Process of identifying client requirements

The process of identifying client requirements includes:

- Meeting with the client, including face-to-face meetings, over the telephone contact and electronic communications
- Identifying the need to coordinate and integrate services for the bookings
- Determining and negotiating individual client wants, needs and preferences
- Identifying relevant specifics that relate to the identified wants, needs and preferences.

Seek client personal information

The standard information contained within these documents is as follows:

- Name, initial and title
- Dates of birth for passengers, in particular children
- Contact details for home, work and mobiles
- Special meal requests or seating preferences
- Frequent flyer information and club memberships
- Details of travel such as dates, places and products
- Payment details
- Wholesaler or Consolidator used.

Identify specific client travel requirements

Specific client travel requirements may be related to:

- Name and contact details of the client including details of the traveller where the contact is not the user
- Days, dates and times
- Duration and frequency
- Budget
- Customer numbers and classification, including adults, children, babies and groups
- Non-negotiable elements that relate to the quotation
- Preferred travel options
- Reasons for trip, function
- Destinations, venues, attractions and events
- Accommodation and dining/catering requirements
- Catering and conference requirements
- Proposed itinerary, including destinations (intermediary and final destinations), services and activities required, attractions to be visited
- Previous history of the client in relation to bookings made.

Using a Quotation Planner

Each organisation will have established pro-formas or documents which must be used by staff when collecting information from clients in which quotations can be based around.

The use of scraps of paper and posits are not advisable, for obvious reasons. A standard enquiry form is recommended to ensure that the correct questions are asked and that vital information is not forgotten.

On the next page is an example of a form that will assist in the collection and recording of the information required to provide a quotation.

QUOTATION PLANNER - TEMPLATE

General Information

Consultant	
Date	
Contact name	
Telephone	
Mobile	
Email	
Destination	

Passenger/s

Surname	First Name	Title	DOB

General Questions

How many people will be travelling?

____

____

What type of holiday and/or destination do you have in mind?

____

____

When do you want to travel?

____

____

How long do you want to be away?

____

____

Where did you go on your last holiday?

____

____

What standard of accommodation are you looking for?

____

____

How much are you considering spending?

____

____

Are you a member of any frequent flyer programmes?

____

____

Rooming/cabin type required?

____

____

Preferred departure/return points?

____

____

Do you have any special requirements?

____

____

Is your passport valid?

____

____

What is the nationality of your passport?

____

____

Flight preferences

Dept. Date	Origin	Destination	Airline	ETD/ETA	Costing

Land preferences

Arr. Date	Dept. Date	Accommodation/Ship/Tour	Room Type	No.	Costing

Checklist

Travel insurance	
Passport details	
Visa	
Schedule of fees	
Merchant fees	
Foreign currency	
Other	

Follow-up

Date quote provided	
1. Call back date/time	
2. Call back/date/time	

Activity

Activity 7 - Identify client requirements

Using a quotation planner or other template of your choice you are to identify the travel package needs of a fellow class participant.

That person should identify their 'perfect holiday'.

2.3 Determine and select most appropriate supplier to meet identified client requirements

Introduction

Once you have gathered all the information relating to possible client requirements it is now time to determine and select the appropriate supplier to meet their needs.

Sourcing and selecting product and services to provide a quotation for your customer is reliant on your industry knowledge of what is possible.

It is also based on:

- Availability of appropriate products and services to suit the stated or established customer needs
- Suitable suppliers or wholesalers that can provide these products
- Prices that meet the passengers' budget.

Activities associated with selecting suppliers of required products and services

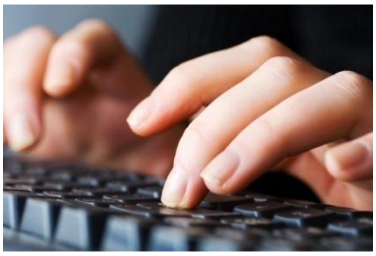
Activities associated with selecting appropriate suppliers of products and services to meet client requirements include:

- Identify list of final products and services
- Identify suitable suppliers
- Complying with client requirements
- Ensuring availability of products and services
- Negotiating agreements with suppliers, carriers and providers

In essence these steps will be explained in more detail in this manual.

Consider existing agreements & preferred suppliers

Your selection of suitable suppliers will to some extent be influenced by any existing commercial agreements, commonly termed preferred agreements that may be in place in the organisation where you are employed.



There are many suppliers out there, and sometimes it is difficult to know who to use and trust. Companies often have ‘preferred’ arrangements with suppliers. You will need to ask your manager for the list of ‘preferred’.

A preferred agreement is a formal commercial agreement between a supplier and a travel agent which facilitates the payment of extra commission and other benefits by the supplier to the travel agent in exchange for the travel agents agreement to sell the suppliers product.

Where there are preferred agreements in place, the expectation is that these products will be displayed and sold over other similar product. To facilitate this, specific preferred product training, information and resources are extended to the travel agent.

If a supplier is on the preferred list, it usually means they have been thoroughly checked by your company. Their finances have usually been checked and passed, and any necessary licenses obtained. It also means that your company has gathered other feedback on this supplier as to what quality of service they provide. As the agent, dealing with a supplier from a preferred list, gives you peace of mind. You can be confident that you are dealing with a competent, professional and reputable company. This confidence then extends to the client.

In addition to having their character investigated and passed, ‘preferred’ companies can also sometimes offer a commission override. This means a financial incentive to you to sell their product over others. These overrides are negotiated on your behalf usually by your manager, or in the case of bigger companies, by the BDMs – Business Development Managers.

‘Preferred’ agreements are exclusive and confidential arrangements. Both parties need to have trust in each other for it to be a successful relationship. The stronger these relationships become, the more lucrative they will be.

Dealing with a ‘preferred’ supplier will not guarantee success. It just reduces the risk. Preferred suppliers require constant monitoring by your company, to ensure they still fit the requirements. If you experience difficulties with a preferred, this needs to be reported to the appropriate person within your company.

Activity 8 - Select suppliers to meet identified client requirements

You are to explain how you will identify appropriate suppliers to meet the needs of one of the following clients:

OPTION A - Your fellow participant's perfect holiday, as identified in Activity 7

OR

OPTION B

A client who has come to your travel company, requesting a business trip to be arranged for three persons from his organisation

The travelling party consists of:

- Mr Wayne Hunt (himself) – Australian passport holder
- Mrs Sheena Irwin (his colleague) – British passport holder
- Mr Daniel Mabilia (his colleague) – American passport holder.

They have different passports and therefore may have visa requirements, given the purpose of their trip is 'for business meetings'

Company details are as follows:

ASEAN Corporation
15 Jalan Stesen Sentral
Kuala Lumpur, Malaysia 50470
P) 60-3-2264-2100
E) w.hunt@asean.com

You can use your own personal details (address, phone, email, etc.) as a reference for his personal details.

Proposed itinerary

- They are travelling from and returning to Kuala Lumpur
- They have a proposed itinerary that is as follows:

DAY	PROPOSED ACTIVITIES
Monday	AM Flight Kuala Lumpur to Jakarta
Tuesday	AM Meetings in central Jakarta PM Recreational Activity
Wednesday	AM Flight Jakarta to Manila PM Meetings in central Manila
Thursday	AM Flight from Manila to Hong Kong PM Recreational Activity
Friday	AM Meetings in central Hong Kong PM Recreational Activity (Golf)
Saturday	AM Flight Hong Kong to Kuala Lumpur

Quotation Requests

He has requested the following information:

- The dates of the travel are to be determined by the travel company, but they must be from Monday to Saturday
- They are to fly business class
- They must have separate hotel rooms
- The hotels must be centrally located and be a minimum of '4 stars'
- Hotel rates must include breakfast. Their budget is USD$400 per night including taxes and breakfast
- A meeting room must be arranged for meetings at the hotel in which they are staying. They need a boardroom for 10 people including catering (tea, coffee, and biscuits) for three hours. No electronic equipment is required in the meeting rooms.
- Transportation to/from all airports required. Hotel car preferable. In Kuala Lumpur transport options must be provided to/from airport from their office.
- Any times stipulated as Recreational Activity is free for the travel agent to make suggestions and to provide costings. They are looking for general sightseeing with some opportunities for shopping to be included in one of the activities.

- Suggested dining establishments for dinner in Jakarta, Manila and Hong Kong is required. They are looking for a 'high end local culinary experience' and have a budget of USD$100 each, per meal period, for food only.
- The company will pay for all expenses using one American Express Corporate Credit Card.
- Any further information relating to the travel can be reflected in your own personal details or recommendations.
- All prices must be quoted in United States Dollars (USD$)
- As a travel agent, you are to mark up all costs by 3% as a profit margin.

SUPPLIER SELECTION STRATEGY

KEY CLIENT REQUIREMENTS	PRODUCTS / SERVICES SOUGHT	POSSIBLE SUPPLIERS	DETAILS / COSTS FOR INCLUSION IN QUOTATION

KEY CLIENT REQUIREMENTS	PRODUCTS / SERVICES SOUGHT	POSSIBLE SUPPLIERS	DETAILS / COSTS FOR INCLUSION IN QUOTATION

2.4 Prepare and supply quotation to client

Introduction

Once suitable suppliers have been selected, with relevant information to match client requirements researched and collated, it is now time to place all information into a quotation.

A quotation is a summary of costs for products and services which are provided by the travel agent to clients who wish to travel, either within a specific country or overseas and who are considering purchasing these products and services from your travel organisation.

Methods to prepare quotations

There are two primary ways in which a travel organisation agent will record and administer a customer's details and requirements in relation to the provision of a quotation:

- Electronic – a computer record
- Manual – a hand written record.

In both instances, most organisations will have a recommended format or input process for the collection and recording of this information.

All information relating to the quotation must be recorded regardless of the type of system used i.e. manual or electronic.

Quotation formats

In the previous section, a template has been identified to collect vital customer information and their travel needs.

In addition to having templates and guidelines when collecting information, travel companies will also have established formats when providing quotations to customers as well.

Every travel company will have their own guidelines regarding the provision of quotations to customers and you will need to work within the applicable and particular business procedures. Providing a quotation can be quick and easy or quite time consuming.

For complex itineraries requiring a lot of work, a formal written itinerary and quotation will be provided. Some businesses will charge an itinerary planning fee for this service. Basic and straight forward quotations e.g. a tour and an airfare will take less time and an approximate amount can often be provided on the spot.

These quotes are provided either formally in writing using a software program or informally on the back of a business card or on a 'with compliments' slip.

Customers will invariably shop around and in many instances you may not be the only travel agent being asked to provide a quotation. There are travel agents who offer to 'beat any price' or 'price match' any quotation. The provision of an informal quote, initially, will often make it challenging for another agent to decipher exactly what they are trying to beat or match. It is recommended that when engaging in 'price beat' or 'price match' activities that you are completely satisfied that you are dealing with apples and apples and not apples and oranges. Failure to do so will impact your bottom line.

Prepare the quotation to reflect all inclusions required by the customer

General quotation inclusions

Quotations must be provided in a format that can be easily understood by a client. It is important therefore that the following general protocols are followed:

- Use official company stationery – letterhead or standard pro-forma document
- Date the quote
- Avoid the use of jargon
- Ensure correct spelling and grammar
- Include Customer/Passenger name/s
- Specify currency e.g. All prices are quoted in Singaporean Dollars
- Provide both a per person and total price
- State validity of the quote
- Detail all the arrangements included in the quote – products, services, dates, times
- Follow a logical and sequential order for arrangements
- Detail deposit amount and date required
- Cover payment options and any associated cost e.g. merchant fee
- Draw attention to the booking terms and conditions – agency and suppliers
- Outline any passport and/or visa requirements
- Recommend Travel Insurance
- Thank the customer for the opportunity to provide the quotation
- Be specific when and how you will contacting them to follow-up

Inclusions in formal quotations

The most formal quotation would be a combination of a letter stating all costs with a detailed itinerary of times, dates etc.

This letter would include the following information:

- Date of quotation and reference number (if applicable)
- Clients name
- Phone contacts and fax (if applicable)

- Email address
- Address
- Month of travel
- Length of travel and class of travel
- All products and services required
- Inclusions and exclusions
- Payment requirements and cancellation fees

- Conditions of the quote
- Deposits required
- Service fees
- Expiry date of the quotation
- General conditions and rules

Types of terms and conditions

All quotations will come with terms and conditions that will apply to various aspects of travel arrangements.

Terms and conditions may be provided by:

- The travel agent themselves
- Suppliers
- The individual product or service provider

You are strongly advised to refer to these terms and conditions when providing a quotation for your customer.

It is essential that any terms and conditions are clearly identified and that customers understand them.

Whilst there may be an endless set of terms and conditions that may be established, to suit the needs of the respective suppliers and providers, taking into account organisational requirements and the nature of their services, there are common terms and conditions that relate to most travel related quotations.

General terms and conditions include:

- Terms and methods of payment, including dates for payment of deposits and final payment
- Notifications regarding final confirmation of the booking and, where relevant, numbers
- Cancellations and penalties and charges that apply
- Procedures and charges that apply to name and date changes for the booking
- Guarantees and warranties that apply to the products and services covered by the quotation
- Exclusion and limitation of liability clauses
- Identification of the period for which the quotation is valid
- Whether or not the quotation is subject to change with or without notice
- Reference to associated terms and conditions as imposed by third party providers
- General industry rules, regulations and codes.

Calculate costs of products and services

Naturally the cost provided to the travel company will differ to that to be included in a proposal as suitable mark ups will be determined in line with organisational profit expectations.

The main activities associated with calculating costs of products and services should include:

- Ensuring comprehensiveness and accuracy of all information provided
- Negotiating costs with suppliers, providers and carriers to obtain optimal prices
- Calculating commissions that apply to the quotation
- Calculating mark-up net costs
- Applying host enterprise procedures to determine selling prices
- Including all relevant and legitimate taxes, fees and other charges to provide a quotation that has no hidden charges
- Incorporating currency conversions into the statement of prices, where applicable
- Factoring allowable discounts
- Considering and including package deals, where appropriate
- Taking into account seasonal and other premiums that may apply to bookings
- Estimations based on current year prices.

Calculate mark-up nett costs and commissions to determine a profitable selling price

A large part of the job of a travel agent is sourcing the best pricing for your client's itinerary, while at the same time ensuring that you are earning a reasonable return for effort expended and service provided.

The underlying pricing principle is a business will source product and services from various principals and suppliers at a rate that is sufficiently competitive to allow for a reasonable margin.

The costing and pricing of these products and services will take account of currency exchange rates, margins for the wholesaler and the various levels of retail travel agent commission they intend to offer.

Here is an overview of the most common methods:

Method 1 – Gross price less commission

1. Local suppliers such as hotels, guides, coach companies, transfer companies etc. sell their product to local tour operators at a rate referred to as nett nett.
2. The tour operators or wholesaler will contract for these services at the nett nett rate and add a margin to allow for a reasonable profit. This rate is termed the nett rate.
3. The tour operator or wholesaler will then add either a percentage or dollar amount to the nett rate to allow for the payment of travel agents commission.
4. This then becomes the gross price for the product and service and it is this rate which is published in brochures and on websites.
5. The product is then distributed and sold to the customer via various distribution channels, one of which is the travel agent network. In exchange for distributing (promoting and selling) their product, the tour operator or wholesaler will extend a small payment to the travel agent. This is termed travel agent commission.

The percentage commission paid will vary depending on the type of product and any preferred agreements that may be in place however it averages around 10% for land arrangements. Commission on airfares can be anything from no commission to a maximum of 9% with most being around 5%.

Method 2 – Nett plus mark-up

There are instances where a travel agent is offered or sources a nett cost for a product or service.

The travel agent is then at liberty to mark up the nett cost by adding a percentage or dollar amount to reach a gross price which is then provided to the customer.

The amount of the mark-up (percentage or dollar value) is most often influenced by the organisation and the conditions in the market place.

In this instance the difference between the nett cost and the marked up price represents the travel agent commission or margin. This typically applies to airfares where the airline or ticket consolidator will provide a nett airfare to the travel agent.

Format of quotations

Depending on the system used, electronically generated quotations will all look different.

The basics however remain the same.

Here is an example of what such a document may look like. This quotation is for airfares, hotel accommodation and insurance.

Travel Agent Details

PROPOSAL

Quote Date: 13-12-2016
Quote No: 10275-00041760

Consultant: Super Sally
Email: superdupertravel@bigpond.com

PO/GroupCode:

Charged to:
Salimeh Jones
9 Pickersgill Avenue
Cherry Orchards, Victoria 3001

Lead Passenger: JONES/SALIMEHMS
Other Passengers: BROWN/HILMEMR

Details	Qty	PP Price	Taxes	Inc. Total
Return airfares Melbourne to Hawaii Depart Melbourne 27 Dec 16 10 nights Honolulu 6 nights Maui Arrive Melbourne 13 Jan 17	2	$1,278.00	$554.00	$3,664.00
MOANA SURFRIDER Ocean view room 10 nights in 27 Dec – out 06 Jan No meals	1	$2,500.00	$0.00	$2,500.00
Comprehensive Insurance 12 Days Plan A	1	$420.00	$0.00	$420.00
TOTAL				**$6,584.00**

Conditions

Quote Condition: Please note that this is a quote only and no booking has been made. The quoted price is subject to change anytime.

Comments

This quote is valid for 7 days from date of issue

"Without a Travel Agent, You're on your own"

Process of explaining and expanding on the quotation

Whilst you as the travel agent may have spent considerable time researching and developing a quotation for a customer, it is important to remember that the customer may have only seen an initial quotation.

Also it is important to remember that customers do not have the same degree and depth of knowledge in the travel industry and the processes involved in making bookings, and that they will need explanation from yourself to help their understanding.

Key aspects of providing a quotation

As mentioned, some of the key aspects of providing a quotation are to:

- Providing personal interpretation and explanation of the quotation
- Explain in more detail the key pieces of information in them
- Providing supporting brochures and marketing materials to assist with understanding of the quotation.
- Explaining the reasons for charges and fees included in the quotation
- Assisting the client to understand the reputation and expertise of nominated suppliers, providers and carriers
- Answer any questions customers may have
- Provide suggestions and recommendations
- Outline the processes associated with confirming and organising travel arrangements
- Guide them through the sales process.

Activity 9 - Research and collect quotation templates

You are required to conduct research and collect at least one quotation template used by a travel organisation to provide travel information to clients.

One of these templates will be used in Activity 10.

Activity 10 - Prepare a quotation

For the Option you have identified in Activity 8, you are required to prepare a quotation.

Use may use a quotation formation of your choice.

2.5 Confirm authority to proceed from client

Introduction

Once you have provided and explained quotation information to clients the process of selling takes place.

Given that a great deal of time and effort has gone into researching and preparing travel quotations, it is important that the client agrees with what you have provided and is happy to confirm authorisation for you to proceed with the booking of tourism products and services from suppliers.

This section will focus on the actions taking to gain this authorisation.

Identify buying signals

As mentioned, naturally the overriding purpose of providing a quotation to a customer, is for them to agree with what information has been presented to them and to help facilitate the booking of travel services.

When closing in on the sale it is important to monitor customer buying signals and correctly identify and respond to them.

Failure to act promptly on the appropriate signals can result in a lost opportunity, one never again to be recaptured.

If a person decides to buy ‘now’ and that moment is not taken, the same person can reverse that decision about the same product – even at a lower price – a moment, hour or day later.

This underlines that a decision to buy is not a decision that lasts forever – it is a transient moment that we must seize with both hands.

Everyone has experiences where they were primed to make a purchase but didn’t due to a lack of service staff, lack of someone to process the transaction, or the simple lack of a question such as ‘Are you ready to book’?

Often, that buying decision is never repeated and the sale simply evaporates – the customer spends their money elsewhere, or they change their mind and decide not to make that purchase.

At some point in the consultation with your customer, they will give you an indication that they are ready to buy. Some buying signals are obvious and yet others are indirect and not so apparent. Customers will generally signal interest through their questions and their actions. In any instant it is time to stop selling and close the sale!

Questions to indicate a readiness to buy:

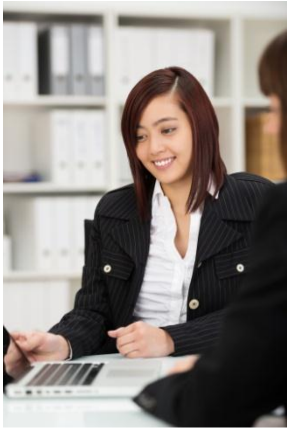
- How early do we need to book?
- Do you accept credit cards?
- Are there seats available on 8 January?
- Do I need to pay a deposit?
- Can you arrange for vegetarian meals?

Actions that show a commitment

There are a number of signs that indicate customers will make a commitment to a sale.

These include:

- Taking out their credit card or wallet
- Looking for a pen to fill out a booking form
- Spending a long time studying one particular product
- Positive body language, leaning forward in their chair, responding to your eye contact, alert and attentive, frequently nodding.



You've received some obvious buying signals and you're confident that your customer is ready to make a decision to buy. Many sales are lost because the consultant is not confident to ask for the sale. How? Try:

- "How will you be paying for this?”
- “Would you like me to go ahead and make the booking now?”
- “Can you leave a deposit with me?”
- “So, what do you think?”
- “Is this what you're after?”

After making the necessary arrangements, summarise the current situation, tell them what will happen next and how long it will take, ask if they have any further questions or anything else you can do for them.

Obtain authority to proceed

In essence this is the key aspect of providing a quotation to the client. It is vital that before any further actions take place, that the client grants authority for you to proceed with the booking of tourism products and services.

This authority may include:

- Verbal notification from client
- Signed authority on standard organisational form.

Each organisation will have its own policies, procedures and documents to record this 'authorisation'.

Actions to make booking

Naturally the actions associated with making bookings relating to each travel enquiry will differ depending on the arrangements and components involved, there are a number of common actions that need to take place.

Possible actions to make booking may include:

- Including organisational contact details in the quotation
- Advising client of web-based opportunities to lodge a booking
- Notifying client of any early-bird discounts or bonuses that apply to placement of bookings before a nominated date
- Confirming need for deposit to accompany booking, where applicable.

Activity 11 - Explain quotation and obtain authorisation to proceed with booking

Based on the quotation prepared in Activity 10, you are to present the quotation to your teacher or other participant.

You will have 10 minutes to make your presentation.

It is important that you:

- Provide accurate information verbally
- Have shown the client to quotation and any supplementary documentation including brochures etc.
- Ensure the information provided meets the needs of the client
- The client understands the content of the quotation
- You have addressed any questions or concerns the client may have
- Have identified buying signals
- Have asked for the sale
- Have received authorisation to proceed with the booking

2.6 Obtain payment from client

Introduction

Once you have received authorisation for the booking to proceed, it is important to collect payment from the client for the products and services identified in the quotation.

Most suppliers will not proceed with any booking unless payment can be made.

Therefore it is essential that your organisation has received monies before making bookings to help make the booking and confirmation process from suppliers as simple and timely as possible.

This section will look at the methods and considerations associated with obtaining payment from clients.

Types of payments

Types of payments include:

- Credit card
- Cash, personal, business or travellers cheque
- Direct debit, electronic funds transfer
- Invoice/account
- Telephone payment
- E-mail or other electronic transmission

Credit card payments

Where the customer wishes to pay for their land arrangements using a credit card there are 2 options.

Travel agent processes payment

The travel agent processes the payment, including the applicable merchant fee.

The travel agent would then transfer the payment (nett) to the supplier/tour operator by sending a cheque or via one of the many electronic methods e.g. SmartMoney, MoneyDirect etc.

To process credit card and charge card payments is a simple procedure using the EFTPOS terminal. The magnet strip on the back of the card is swiped through the machine.

In some cases you may need a security code to unlock the machine.

Clients may have a limit on their credit card but because the entire process is electronic it will authorise the card and the payment amount in a very short time.

The step by step procedure is something the team leader should take each new employee through to ensure it is done correctly.

- Swipe the magnetic strip on the card through the machine or in some cases insert the card into the base of the machine
- The payment will be electronically authorised by the bank, this will only take a few seconds
- A receipt will be issued from the machine for your company first, then a receipt will follow for your client
- The client will either sign the bottom of the receipt or key in a pin number to complete the transaction
- If the client signs, the signature will need to be checked to the signature on the back of the card and the name checked on the front of the card
- This payment can be recorded in the client's file as a receipt transaction

Travel agent sends credit card authorisation form

The travel agent completes or has the client complete a credit card authorisation form which is provided by the supplier/operator. The supplier/operator will then debit the client's credit card for the gross amount and refund the commission to the travel agent.

What follows is an example of a credit card authorisation:

NEWMANS HOLIDAYS

AUTHORISATION FOR CREDIT CARDS

TO: NEWMANS HOLIDAYS - ACCOUNTS
Fax: 1300 764 467

BOOKING NUMBER:________________ **DATE OF DEPARTURE:**________________

Gross Booking Value	$
Credit card fee (if applicable)	$
Total Credit Card Payment	$

Credit Card Fee	Tick
Add to Credit Card	
Subtract from Commission	

Tick	Card Type	Fee
	Visa	1.40%
	MasterCard	1.40%
	Diners	1.40%
	Amex	1.40%

Bank Detail for Commission	
BSB	
Account Number	

CREDIT CARD NUMBER:____

CARD HOLDER NAME:____________________________ **EXPIRY DATE:**______/______

SIGNATURE:____

AGENCY AUTHORISATION

I hereby certify that I am holding the signature of the credit card holder above on file, and that I have been given authorisation by the card holder to charge travel arrangements organised by Newmans Holidays to the credit card number entered on the above credit card charge form on receipt of the cardholder's verbal requests.

I accept full responsibility and will reimburse Newmans Holidays the amount shown on the above credit card in the event that the billing is rejected.

SIGNATURE: ____

FULL NAME: ________________________ **POSITION:**________________________

AGENCY NAME: ____

Please note charges will appear on credit card statement as Stella Travel Services
When applicable, if the credit card fee is not charged to the passengers card then this fee will be deducted from your commission. Commission will be refunded to your agency via Direct Bank Deposit

Newmans Holidays. ACN 003 237 296 / ABN 84 003 237 296 **E-mail admin@newmanshols.com.au**
Level 5, 310 King Street MELBOURNE 3000. Ph 1300 130 525 Fax 1300 764 467

Cash payments

Whilst it is still an accepted payment method, it is no longer popular to make or receive payments by cash.

One reason that cash is no longer popular is the possibility of error in receiving and giving change. People do not want to carry large amounts of cash when there are easy alternate methods available.

The remedy is to always be clear about the amount the client hands over by counting out the cash in front of them and to have a colleague recount the cash.

Keep the cash out until the transaction has been finalised and change has been given.

Personal, business or travellers cheque

Although no longer as widely used, some people still write cheques to pay accounts. When a cheque is properly presented and sufficient funds are available, the bank agrees to pay the amount on the cheque to the payee.

Tips on writing a cheque:

- Use 'not negotiable' crossed cheques (this will reduce the risk of fraud) as these cheques can only be paid into the payee's account
- Write the amount to be paid in words and figures and do not leave spaces between the words and figures
- Write in ink that cannot be altered and never in pencil
- Never write a cheque unless sufficient funds are in the cheque account as this will incur dishonour fees

Types of cheques

Cheques can be one of the following:

- Order cheques – these require the money to be paid to the person or organisation written on the cheque (the payee), i.e. not necessarily the person banking the cheque. These are the most common type of cheque
- Cash or bearer cheques – this type of cheque is payable to the person who will present the cheque or is made out to 'Pay Cash'. If the cheque is made out for cash, the cheque can be taken to the bank of the account holder to exchange for cash, rather than being deposited into an account
- Bank cheques – are sometimes also called bank drafts. The cheque is written by the bank. These are often used for larger purchases and when the payment needs to be secure and transparent

Travellers Cheques

A safe, easy way to carry ready cash in the form of a cheque, each cheque can represent a currency and denomination. Simply sign the cheques when you purchase them and be sure to keep a note of the serial numbers (and keep this separate from your Traveller's Cheques) so that you are protected in the event your cheques are lost or stolen. When you're ready to use a cheque, just sign your name in the lower left-hand corner and date it in the presence of the acceptor. Traveller's Cheques are accepted at thousands of locations worldwide, including banks and bureaux de change.

Accepting Traveller's Cheques as payment

Like a bank cheque, in order to purchase Traveller's Cheques the client must have sufficient cleared funds for the purchase. They are available in a range of currencies but are usually only accepted by travel agencies in United States Dollars (USD) currency unless the agency operates a foreign exchange bureau. Always check with a team leader before accepting this form of payment.

If the Traveller's Cheques are in USD, the currency the Traveller's Cheques are in will need to be converted to local currency by dividing the amount tendered by the bankers buying rate of exchange for the date of transaction.

On presentation of a Traveller's Cheque the consultant needs to:

- Check if the brand of the Travellers Cheque is accepted by the agency.
- Check if the Travellers Cheque is in a local or foreign currency.
- Ask the client to countersign the Cheque and then compare the signature with the original signature on the cheque.
- Ask the client to provide identification such as a passport for verification.

Direct debit, electronic funds transfer

This is a popular and safe way of making a payment.

In many cases a travel organisation will require one of the following:

- Proof of payment - such as a payment confirmation from the bank themselves
- Evidence of the funds arriving at the travel organisation's bank

Invoice/Statement of account

The invoice or statement of account is an itemised list of products and services sent to the client, stating quantities, prices, previous payments and payment conditions. Invoices are issued when the consultant finalises all the travel arrangements and payment is due.

Travel companies operate on the basis that the travel components booked must be paid for before documents are issued. The exception is corporate clients who pay at a set time negotiated by the travel company regardless if the client has travelled or not.

Travel and corporate agents will receive invoices from suppliers and wholesalers for travel components booked for their clients. They (agent) will then issue and send an invoice to the client with these details plus other travel components if applicable.

Most invoices are no longer paper-based, but rather transmitted electronically. It is still common for electronic remittance or invoicing to be printed in order to maintain paper records.

There will be a date on the invoice stating when the client needs to pay and until it is paid the travel documents will not be issued. The invoice from the supplier/wholesaler operates the same way, stating when the agency needs to pay on behalf of the client. If the date of payment is missed then the products and services booked can be cancelled and travel arrangements lost. It is part of the consultant's job to diarise dates, prioritise and be organised so this never occurs.

Invoice hard copies are filed in the clients booking file and are stored according to the office procedures, once a client has returned from their trip.

STATEMENT OF ACCOUNT/INVOICE

STAPLETON/JOANNE MRS	**DATE OF ISSUE** 16 Dec 09
16 BLAIR STREET	**DATE DUE** 01 Sep 09
BONDI JUNCTION NSW 2022	**REFERENCE** CC0703080001
	CONSULTANT CCT training

PASSENGER **STAPLETON/JOANNE MRS** **DATE DEPART** **01 Nov 2008**

SERVICE	AMOUNT EXC GST	AMOUNT INC GST	AMOUNT
FLIGHT THAI AIRWAYS INTERNATIONAL 01NOV08 Melbourne/Bangkok/Melbourne 1 x $1200 MEL/BKK/MEL RETURN AIRFARE	$1,202.18	$0.00	$1,402.18
ACCOMMODATION ROYAL ORCHARD SHERATON Check In:01NOV08 Check Out:02NOV08 ROYAL ORCHARD SHERATON Check In:11NOV08 Check Out:12NOV08 1 x $150 x 2 NIGHTS	$300.00	$0.00	$300.00
TOUR CLASSIC ORIENTAL TOURS 02NOV08 THAILAND ADVENTURE TOUR, PICK UP AND DROP OFF AT HOTEL 1 x $1750	$1,750.00	$0.00	$1,750.00
INSURANCE AFTA INSURANCE 1 x $175 SUPER SINGLE PLAN A 12 DAYS	$175.00		$175.00
TOTAL	**$3,627.18**	**$0.00**	**$3,627.18**

LESS MONIES PAID

DATE OF TRANSACTION	TRANSACTION DESCRIPTION	AMOUNT PAID
07 Mar 2008	RECEIPT R000000059	$3,627.18
TOTAL PAID		**$3,627.18**
BALANCE DUE		**$0.00**

Prepare and issue receipts

A receipt is a written acknowledgement that a specified article or sum of money has been received as an exchange. It is a hard copy document that records when a transaction took place at the point of sale.

The receipt contains a description of the transaction that has taken place, what the client has paid for and how the client paid, be it by cash, cheque or EFTPOS, etc.

A receipt provides an easily traced audit trail in the event of an internal or taxation investigation.

There are no rules as to how the receipts should be laid out and can be broken down into the categories that are most appropriate to the organisation.

Information contained in a receipt

It is recommended that the following information be contained in a receipt to verify what took place in case of a dispute.

- Your business name, address and phone number – this verifies where the customer bought it from
- What took place – detailed information about what was bought or what service took place limits any later confusion if an independent person (such as a tribunal) needs to look at what happened. Include the date, price and a description of goods
- The cost of the good or service and the money paid – it is common for disputes to arise over what something cost and what was paid
- Any specific information affecting the transaction – this may include advice about the condition of the good or information about a lack of warranty on certain parts of a service

Electronic receipts (sometimes abbreviated e-receipts) are a frequently used transaction and most travel companies use accounting software designed especially for the travel industry. An example is Galileo- CrossCheck Travel.

In addition to the normal transactional data, electronic receipts often contain data on refund policies and cancellation conditions.

Handwritten receipts are less common and are used mainly in irregular situations. If handwritten receipts are used then the client will take the top copy and a duplicate will be left as a copy for future reference. The business will transfer these transactions into a journal and keep as account records.

Check payment status and take appropriate action

Most travel arrangements are pre-paid and therefore it is important to ensure that full and correct monies have been received from the customer, that this money has been receipted and recorded against your passenger file.

The total money received should always equal the sum gross of all the components booked and pre-paid (refer to your supplier/operator issued confirmation invoices) plus any additional amounts charged to cover insurance or services such as securing a visa and your travel agent fee.

As previously mentioned, the passenger invoice and associated itinerary provided to the customer will reflect the gross amount due for the specified arrangements. The total file receipts issued to the passenger should reconcile to the passenger invoice. With the exception of corporate accounts, where they are provided with an invoice for any travel purchased, there are no circumstances under which documents and in particular air tickets should be issued without payment.

Following up under and over payments from customers

Whilst in the majority of circumstances, the amount paid by customers will match what has been invoiced. That said, at times customers may have paid either too much or not enough.

In either case, these must be followed up immediately.

Under payments from the customer

These are often due to one or more of the following:

- Failure to invoice for an item, product or service
- Incorrect amounts on an invoice for an item, product or service
- Failure to provide an updated invoice after amendments have been made
- Failure to collect sufficient funds from the customer
- Failure to process authorised credit card transactions
- Amendment or cancellation fees not charged

Over payments from the customer

It is also possible to over collect from the customer in which case you will have a credit on the file which should also be resolved. An over payment from a customer is often due to one or more of the following:

- Payment for an item, product or service which has not been booked
- Incorrect amounts on an invoice for an item, product or service
- Failure to provide an updated invoice after a cancellation/amendment has been made
- A refund to the passenger is waiting to be processed
- Money receipted or allocated to incorrect file

Taking corrective action

Where an over or under payment is identified, corrective action must be taken:

- Check that all receipts have been correctly allocated to the file
- Correct, via journal or office specific entry, any incorrectly allocated money
- Process credit cards where this has not been done
- Reserve any item, product or service that has not been booked
- Make applicable amendments to items, products and services booked
- Issue a revised invoice for the customer
- Provide a written record of all receipts
- Process refunds if applicable

In the event that you are unable to reconcile any differences, assistance and guidance from your manager must be sought.

Assuming that there are no issues with receipts and payments, the difference between what you have received and what you intend to pay out will represent the commission earned on the file.

Activity 12 - Identify popular methods of payment

You are required to identify the advantages and disadvantages of the different methods of payment that can be made by customers.

PAYMENT METHOD	ADVANTAGES	DISADVANTAGES
Credit card		
Cash, personal, business or traveller's cheque		
Direct debit, electronic funds transfer		
Invoice/account		
Telephone payment		
E-mail or other electronic transmission		

2.7 Update client file

5.3 Update client file

Introduction

Just because the client has agreed to the quotation, authorised the booking to proceed and made payment for the agreed products and services, it does not mean that changes will not need to be made to the client file.

This section will look at the changes that need to be made to client files between the time of making a booking through to undertaking the actual travel activities.

Reasons to update client file

Whilst there are endless reasons why to update the client file, the common reasons include:

- Adding confirmations and other responses from suppliers
- Adding communications from client
- Including documents and records relating to amendments and adjustments to initial request/booking
- Up-dating financial status of client file
- Receiving, processing and recording payments
- Generating and issuing invoices and credit notes for changed arrangements.

Update the financial status of client file

Keeping track of financial transactions and being responsible for processing accounts payable and receivable requires excellent organisation skills.

Understanding the policies and procedures of your organisation is essential in order to plan what sourced documents are needed, what financial records you need to access and what you will do if you discover any discrepancies.

Naturally any time a payment is made or received, it must be recorded on the client's account.

In addition, any time new products and services are booked, that need to be paid by the client must also be identified and recorded.

Amend quotation products and services required

There are many reasons quotations can be done several times before a final decision is made. Most of the reasons are out of the control of the person who constructed the original draft version of the quotation.

Regardless of the need to make changes, any changes must be:

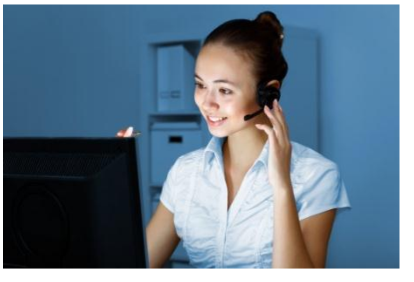
- Reflect need for change
- Done in a timely manner
- Accurate and relevant to the changes

For these reasons all quotations are kept on record in the clients file, either manually or electronically. This makes the information easily accessible to the entire team in the office ensuring efficiency in situations where the quotation needs to be amended.

Reasons for amendments

There are endless reasons for the need to change a draft quotation including but not limited to:

- Changes requested by customers – these can relate to changes or new requests in travel requirements or arrangements
- Changes requested by management – these can relate to errors identified, format, policies and procedures or recommendations
- Changes notified by suppliers or product/service providers – these can relate to availability, price changes, conditions etc.
- Changes notified by governments – including taxes, visas, travel advisories or warnings



Adjust and update quotations to take account of changed requests or arrangements

Client changes

If the client has requested changes, then you need to also check all elements of the original quote to see if and how they are affected and forward the updated quotation to the customer.

Some travel agents will impose charges where the change requested by the customer entails extensive itinerary planning and quoting. In most instances where a fee is applied, this is deducted from the total value of the booking once the customer confirms the booking by paying the required deposit. You will need to comply with the business requirements in this regard.

Changes notified by management

Normally when reviewed by a colleague or manager changes may need to take place due to:

- Errors may have been identified
- Suggestions made to ensure the quotation is in the most 'user friendly' format for customers.
- Policies or procedures may impact on the quotation.

Changes notified by suppliers

There are situations where the supplier, tour operator or wholesaler will advise you of changes, in which case these changes or amendments must be provided to your customer.

Here are some reasons that suppliers can/will make changes:

- Change in costing due to currency fluctuations (usually increase)
- Change in departure or arrival times of flights, tours, rail, coach etc.
- New taxes and charges for flights or car hire
- Tour may be cancelled and customer rescheduled onto another option
- Departure or return date or location
- Number of passengers in the group
- Hotel changes such as alternative hotel or change of room type
- Flights may be rescheduled or rerouted causing changes in taxes
- A product or service may be cancelled due to operational reasons
- Weather conditions e.g. lack of snow, hurricanes, and floods etc.
- An 'Act of God' such as a natural disaster or war
- Expiration or withdrawal of the deal, package, offer etc.

If the supplier has made changes then they will provide you with an updated quote / invoice with the changes and new costing. It is important that you carefully check the new amended details and if they affect the original quotation provided, that you forward an updated quotation in writing to the customer.

Record all details of adjusted quotations and keep on file

The differences between various quotes may be subtle such as moving the departure day by just one or a few days. This however may have a less than subtle impact on the quotation where the change of date may mean a change of seasonality, from low to high, and thus a much higher price.

Customers often do not understand why their quotation has increased simply because they are departing a few days earlier or later. It is therefore important to be able to refer to the previous quotations where the old date of departure had been recorded.

Remember to keep copies of every version of quotations on file to avoid any discrepancies or disputes at a later date.

Individual businesses will have their own systems, processes and procedures which have been tailored to suit their particular requirements. You are of course expected to comply with these at all times. In general, most agencies will use software that allows for version control in relation to quotations.

Where this is not an option, you will have to devise and implement you own system.

Bear in mind that there are 2 parts to the quotation process:

- Recording, filing and retaining quotations provided to you by product and service suppliers e.g. Wholesalers, Tour Operators etc. This includes any and all supplier initiated changes sent to you e.g. tour price increase
- Recording, filing and retaining quotations provided by you (or your colleagues) to the customer. This includes any and all supplier initiated changes sent to you where you have communicated these to the customer and any and all customer initiated changes.

Methods to record and file information

In both instances records must be kept in one of the following ways:

- Hard copies – physical printouts filed in date order
- Electronic copies – soft copies filed in version order
- Emailed copies – retained in client email folder.

Regardless of the method of recording and filing quotations that is used by an organisation it is essential that:

- All relevant persons have access to files including the most current version
- Everyone understands and follows the correct procedures
- Updates of files are recorded and easily identified
- The most current version is easily identifiable.

Activity 13 - Identify benefits of updating client file

You are required to identify three benefits of updating client files.

1. ____

____

____

2. ____

____

____

3. ____

____

____

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

2.1 Please complete the following activities relating to this Performance Criteria:

- Activity 6

2.2 Please complete the following activities relating to this Performance Criteria:

- Activity 7

2.3 Please complete the following activities relating to this Performance Criteria:

- Activity 8

2.4 Please complete the following activities relating to this Performance Criteria:

- Activities 9,10,11

2.5 Please complete the following activities relating to this Performance Criteria:

- Activity 11

2.6 Please complete the following activities relating to this Performance Criteria:

- Activity 12

2.7 Please complete the following activities relating to this Performance Criteria:

- Activity 13

Summary

Identify client booking requirements

Create client file

- Types of information recording and storage systems
- Importance of recording accurate information
- Benefits of accurately recording information
- Create client files
- Identify client file number
- Client file details
- Activities associated with creating client files

Identify specific client requirements for supplier services

- Process of identifying client requirements
- Seek client personal information
- Identify specific client travel requirements
- Using a Quotation Planner

Determine and select most appropriate supplier to meet identified client requirements

- Activities associated with selecting suppliers of required products and services
- Consider existing agreements & preferred suppliers

Prepare and supply quotation to client

- Methods to prepare quotations
- Quotation formats
- Prepare the quotation to reflect all inclusions required by the customer
- Inclusions in formal quotations
- Types of terms and conditions
- Calculate costs of products and services
- Format of quotations
- Process of explaining and expanding on the quotation

Confirm authority to proceed from client

- Identify buying signals
- Actions that show a commitment
- Obtain authority to proceed
- Actions to make booking

Obtain payment from client

- Types of payments
- Credit card payments
- Cash payments

- Personal, business or travellers cheque
- Direct debit, electronic funds transfer
- Invoice/Statement of account
- Prepare and issue receipts
- Check payment status and take appropriate action
- Following up under and over payments from customers

Update client file

- Reasons to update client file
- Update the financial status of client file
- Amend quotation products and services required
- Reasons for amendments
- Adjust and update quotations to take account of changed requests or arrangements
- Record all details of adjusted quotations and keep on file
- Methods to record and file quotations

Element 3: Request products and services from supplier

3.1 Forward request/s to selected supplier/s

3.2 Comply with organisational requirements in relation to placement of requests for bookings of products and services

Introduction

In the previous section we looked at the process of identifying client requirements, sourcing appropriate tourism products and services through suitable suppliers, preparing quotations and obtaining approval and payment from clients.

In this section we will focus on the next step. This step is aimed at requesting the relevant products and services requested by clients from suppliers selected during the quotation process.

Purpose of contacting suppliers

Previously the focus on contacting suppliers was to gather accurate information regarding products and services, whereas now the focus is on making bookings.

You need to contact suppliers of tourism product to:

- Confirm availability of products and services
- Confirm prices as stated in quotation
- Make a booking for particular products and services
- Provide customer and agent details
- Request special services or requirements
- Identify payment requirements
- Ask to receive confirmation of booking
- Request additional resources or documentation that the client may require.

Comply with organisational requirements when forwarding requests to suppliers

When making requests for products and services through suppliers, each organisation will have their own policies and procedures about who and how this process can take place.

It is important that these are followed at all times, given the fact that not only will organisations have preferred supplier arrangements in place (as identified in Section 2.3), but large volumes of business, including high amounts of money, are involved, sometimes with bookings made without payment yet being received by clients.

Organisational requirements in relation to placement of requests for bookings of products and services may include:

- Scope of authority limitations
- Designated person authorities for nominated suppliers
- Volume and value consideration related to booking
- Method of lodgement
- Timing requirements.

Activity 14 - Identify organisational requirements

You are required to identify four requirements (policies or procedures) you would have in place when placing requests for tourism product and services bookings through suppliers.

Explain the reasoning for the requirement.

Requirements (policies or procedures)	Reasoning for requirement

Methods to forward requests to suppliers

Requesting products and services can be done in many different ways and each supplier will have many methods making requesting an easy and quick process. The different methods to forward requests may include:

Sending hard copy requests

This includes:

- Mail
- Personal delivery.

Making verbal requests

This includes:

- Face-to-face
- Over the telephone
- Through Skype.

Lodging electronic requests

This includes:

- Fax
- Computerised reservation system
- E-mail
- Online through supplier websites - via a travel agent only area of the applicable website. These 'agent only' access areas of supplier websites are user name and password protected and some will allow the agent to initiate a booking.

Activity 15 - Identify methods of requesting products and services

Based on your quotation created in Activities 10&11 identify the methods you would use to request different products and services.

Product / Service	**Supplier**	**Method of request**

Make requests for multiple services

Reservations for multiple services can involve many different suppliers to ensure the customer's requirements are met.

This will require the ability to coordinate effectively the booking process from the initial request to the confirmation. You will also need to:

- Interpret correctly requirements and services
- Keep accurate records of bookings made
- Find this information and products as required
- Identify codes, abbreviations and jargon.

Juggling multiple flight segments, organising pick up transfers, assigning accommodation with numerous room types, managing cruises or coach tours to squeeze in to tight date schedules, is often complex and requires the and skills of an experienced travel consultant.

When the flights, the client may have requested, are not yet confirmed it would be difficult to book accommodation with no definite dates set and so to, tours, transfers etc.

It can be a waiting game for flights to confirm so the travel consultant will book alternate flights and from these confirmed flights try to confirm accommodation. If the waitlisted flights are cleared (confirmed) then the accommodation will need to be changed to the new dates and so will any transfers, tours etc.

Coach tours are important to book and confirm because there are limited dates and times available, the travel consultant would secure a reservation immediately, even before confirming flights. Then accommodation, transfers etc. all other components would need to fit into the dates of the confirmed coach tour. This also applies to cruising and specialised touring.

Request bookings and costs from suppliers

As mentioned, in order to request the booking and costs of products and services you will need to contact the applicable supplier, tour operator and wholesaler for the individual components that you have selected based on the customer's requirements.

General considerations when requesting bookings and costs

It is important that when dealing with these suppliers that you bear the following in mind:

- Be polite and respectful at all times
- Have all the necessary information to hand before you make contact
- Have a pen and paper ready
- Listen and accurately record what you are told
- Get the name of the person you are dealing with
- Secure and record the booking reference number
- Request an email copy of the booking.

Requesting tour operator bookings

To request a booking from a tour operator (e.g. Contiki Tours Holidays etc.) you will need:

- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Tour number, name of tour, departure date and departure city
- Number of passengers travelling
- Age of passengers – especially children
- Room type and configuration - single, twin, triple
- Any additional requirements - airfares, transfers, pre and post tour hotel accommodation.

Requesting flights

Information you will need include:

- Names of passengers
- Passport and visa details
- Frequent flyer information
- Airline or combination of airlines
- Flight numbers
- Dates of travel
- Times of travel
- Destinations
- Routing – travel must/not be via selected ports or hemisphere
- Origin and destination e.g. must depart and return to selected ports
- Flight numbers
- Code share flights
- Class of travel
- Stopovers
- Seating preferences
- Special meals
- Infant seats & belts
- Payment conditions
- Taxes.

Requesting wholesaler accommodation bookings

To request a booking for an accommodation package with a wholesaler you need:

- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Accommodation name
- Number of night required - in and out dates
- Early and late check-in, check-out out or day use
- Number of passengers travelling
- Age of passengers - especially children
- Room type and bedding configuration required - single, twin, double, triple, king, queen, adjoining rooms, kitchenette, 1 or 2 bedroom apartment
- Any additional requirements - airfares, transfers, meals, tours.

Requesting wholesaler cruise bookings

To request a booking for a cruise wholesaler e.g. (P&O, Crystal, Cunard, Carnival) you need:

- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Name of the ship or cruise company name
- Cruise name, number and date of departure and departure port
- Number of passengers travelling
- Age of passengers - especially children and seniors
- Cabin type, bedding configuration required - single, twin berth triple berth, quad berth, inside, outside, cabin, deck name or level, balcony
- Any additional requirements - airfares, transfers, pre and post cruise accommodation.

Requesting car hire bookings

To request a booking for a car hire or motorhome (e.g. Driveaway Holidays, Avis, Hertz, Budget) you need:

- Your agency name, password or code
- Passenger names exactly as they appear in their passports
- Vehicle type or code - size, air conditioned, petrol or diesel, manual or automatic
- Number of passengers travelling
- Age of passengers - especially those under 25 years and any children
- Pick-up and drop off dates - duration impacts rate
- Pick-up and drop-off times - important when calculating number of days

- Pick-up and drop-off location - fees apply for one way rentals
- Number of drivers - often surcharges apply for additional drivers
- Where the customer plans to take the vehicle - some countries are restricted
- Any additional requirements - baby seat, GPS, ski racks.

Negotiate costs with suppliers

In most instances travel agents are not required to negotiate costs with suppliers. Usually this is done by the wholesaler, tour operator or General Sales Agent and by specific people within the organisation, commonly termed product buyers.

There may however be occasions where in order to secure a particular product or service for your customer you may be required to go outside of the recognised channels and deal direct with the principal e.g. for a group, charter, conference, special interest or some kind of unique product or service not offered by a local supplier or if offered, where the pricing is prohibitive.

In this situation the following may be negotiable.

- The gross price
- The commission
- The Nett price
- The currency
- The method of payment
- The deposit amount and deadline
- The final payment deadline
- The cancellation or amendment fees
- The allocation of seats, rooms or cabins
- The release back date for unsold allocations
- The deadline for final passenger names or numbers.

Bear in mind that while you may be able to negotiate a better price you will also be required to do a substantial amount of extra work in relation to the ongoing monitoring and management of product and services sourced in this way.

In many instances, particularly with a group, there is financial risk to the travel agent and substantial deposits should be collected from the customer before entering into arrangements where you are dealing direct with the principal.

Also it is a good idea to research these suppliers to ensure that they are above board and that they genuinely offer and are able to provide the particular product and/or service contracted.

Confirm costs relating to each product and service

Individual products and services are usually priced as follows:

Flights

- Per person
- Broken down into flight and taxes.

Car hire

- Per total rental duration with specified inclusions
- One 24 hour period equals one day
- Additional charges (usually pay direct) for confirmed extra's e.g. GPS.

Accommodation

- Per person per night – hotel
- Per night per unit – villa's, units
- Extra bed charge per night
- Children/infants are often free of charge in same room.

Tour

- Per adult per tour
- Per child per tour
- Infants are often free of charge or not permitted
- Per senior/pensioner per tour.

Cruise

- Per person per cabin based on 2 or more passengers
- Extra charge for sole use of cabin.

Transfers

- Per person per transfer e.g. seat in coach
- Per transfer e.g. private limousine.

Passes

- Per pass – Adult/Child/Senior
- Duration – 3 day/5 day etc.

Identifying final supplier details and costs

In summary you should ensure that you have secured and noted down the following information:

- The name of the supplier, wholesaler, tour operator
- The date, time and name of the person providing the booking
- The detail of the various products or service and the price – make a special note of the pricing structure i.e. per person, per rental, per room etc.
- Booking reference number.

All these details should be recorded, either written or electronically, against the customers file for future reference.

In addition, it is vital that once the written email copy of the booking is received, that the content is checked against notes taken at the time of securing the quotation. This should be done before written or verbal information are provided to the customer. It is not unusual for there to be discrepancies which must be rectified immediately.

Mistakes are costly.

3.3 Supply, clarify and confirm all information related to required products and services

3.4 Inform suppliers of required response to requests from supplier/s

3.5 Lodge or confirm formal and official booking/s

3.6 Seek, and lodge requests with, alternative suppliers as required

Introduction

Once all requests for bookings have been sent to the respective suppliers it is now time to follow up the booking request with the end result of obtaining confirmation of the booking of all products and services requested.

One of the main aims of following up the bookings, in addition to confirming the booking/s themselves is to ensure that the information is correct.

Check responses to requests

In the previous section we identified all the requests for products and services to suppliers. Firstly it is essential to check the responses to requests.

This may include a demand for suppliers to provide, in hard copy or electronic format:

- Receipt of request
- Confirmations of ability to supply products and services as requested
- Responses regarding the inability to supply products and services as requested.

Seek alternate suppliers of products and services

At times whilst at the time of a quotation specific products and services may have been available, when it is actually time to make a booking there is no availability.

This is normal for a number of reasons including but not limited to:

- The time that may have elapsed between the time of the original quotation and the authority given to make a booking may be considerable
- There may have been limited availability
- Demand during lead times naturally means others book products and services as dates draw near
- Promotions or special offers may have elapsed or allocations sold.

Where there is an inability to provide products and services the following options exist:

- Source alternate suppliers with similar products and services
- Make amendments to the original request with original suppliers to the satisfaction of the client.

Confirm bookings

One important aspect of making bookings for various tourism products and services is to receive an actual confirmation of bookings.

Before we can issue any documents the booking requests from the supplier and airlines must be confirmed.

Bookings may be confirmed immediately but sometimes it can take 24 hours or longer for your requested products to be confirmed. The reason it may take longer varies from component to component.

An airline booking may be confirmed immediately in a CRS but sometimes a flight may need to be waitlisted if the client wanted a particular date and it was unavailable at time of booking.

A waitlist means on some fares, usually the higher unrestricted types, it is possible to waitlist for a flight that is already fully booked.

This helps passengers to get the flights they originally wanted should there be a cancellation, and it also helps the airlines keep their flights operating as near full as possible.

A hotel booking may be confirmed immediately if the consultant books the hotel using the CRS or online booking site.

If the consultant books through a wholesaler/tour operator they may not have immediate confirmation because they have sold over allotment. This means that the wholesaler was given a certain quota of hotel rooms at a discounted price and all these rooms have been sold. The wholesaler needs to negotiate with the hotel for more rooms at the pre negotiated price. This can take 24 to 48 hours for to confirm.

Types of bookings

Whilst the actual products and services booked will vary, there will commonly be for:

- A single product or service
- Multiple products or services comprising a complete itinerary
- Individuals and groups
- One-off touring arrangements
- Series tours
- Incentive tours
- Meetings and conferences
- Payment of deposit or full payment for products and services.

Methods of requesting confirmation of bookings

Monitoring clients' files is an important part of the booking process and is generally done daily. When a supplier wants to verify that a requested produce is confirmed, they may do this via:

- CRS booking status updates
- Courier (as an updated invoice)
- Online booking procedures
- Facsimile
- Email (as an updated invoice or message)
- Mail
- Telephone.

Confirm booking information

In most cases requests for bookings will be accepted. In these cases booking information will need to be confirmed.

Information from product supplier to the travel agent

Booking advices and confirmations from product supplier to the travel agent will specify:

- The Travel Agent detail
- Customer details
- The products or services booked
- The status of the items
- Date, time, location and duration details
- Information related to previous pre-negotiated cost and payment details
- Nature and scope of services
- Special requests
- The gross price and the nett amount
- The commission expressed as a % and a dollar amount.

In some instances there may be products and services that have been priced however they may not be confirmed. Their status will be 'On Request', 'Pending' or something similar. Prices can change for items that are not confirmed. Generally prices are quoted and invoiced on a per person basis. For packages, often, the total per person price is derived from the sum total of all the products and services, divided by the total number of passengers.

Information from the travel agent to the customer

Passenger confirmation from the travel agent to the customer will specify:

- The Travel Agent detail (Agency letterhead and logo)
- The passenger names
- The products or services booked
- The status of the items
- The gross price – usually quoted per person
- The conditions of booking, amendment and cancellation
- The payment schedule for deposit and final money.

Note: The commission payable to the travel agent and the nett amount due to the product supplier are NOT reflected on the confirmation provided to the passenger by the travel agent.

Check interrelated travel arrangements, times and connections

Where the booking has been made using a CRS/GDS, the system will generally highlight, at the time of booking, any date and segment continuity issues and things such as insufficient connecting time. However assuming that there are none of these issues, or the system has been overridden at time of booking, the CRS/GDS will allow you to end the booking.

It is your responsibility to check that the dates, times, board and off points are correct and in line with the customer requirements.

Where the booking has been made online, via an airline travel agents website, you will be issuing the ticket at the time of booking and will therefore not have a second opportunity to get it right. All the checks therefore must be done at the time of the booking and prior to purchasing and paying for the ticket.

Critical airfare checks

When checking airline reservations, it is important to consider the following:

- Does the number of seats match the number of passengers (PNR versus passenger file)?
- Are there any infants or children and do they require seats?
- Have you verified the date of birth for any infants and/or children?
- Do you have all the correct names for the passengers (match to photo ID)?
- What is the status of the booking i.e. are the seats confirmed?
- Are the flight details correct i.e. date, time, board point/off point?
- Is the class correct for the fare type?
- What discounts apply e.g. infants with/without a seat?
- Do you have a valid filed fare in your booking
- When must the ticket be issued i.e. ticketing time limit?
- What are the cancellation or refund conditions of the fare?

Activity 16 - Confirm bookings

You are required to identify three methods you would use to confirm bookings for the tourism products and services identified in Activities 10 & 11.

1. ____
2. ____
3. ____

Activity 17 - Identify alternate products or services

Based on your quotation created in Activities 10 & 11, for three of the products and services you identified, you are to assume that there is no longer availability requiring you to seek alternate arrangements.

You must choose <u>one</u> alternative arrangement for <u>each</u> of the follow categories of products:

- An airline booking
- An accommodation booking
- A tourism attraction or tour.

Product or service	Original arrangement	Alternate arrangement
Example - Airline	*Cathay Pacific on 1 Jan xx from Singapore to Hong Kong* *Departure: 7am* *Arrival: 11am.* *Cost: $400 including taxes*	*Singapore Airlines on 1 Jan xx from Singapore to Hong Kong* *Departure: 8am* *Arrival: 12pm.* *Cost: $450 including taxes*
Airline		
Accommodation		
Tourism attraction / tour		

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

3.1 Please complete the following activities relating to this Performance Criteria:

- Activities 14,15

3.2 Please complete the following activities relating to this Performance Criteria:

- Activities 14,15

3.3 Please complete the following activities relating to this Performance Criteria:

- Activity 16

3.4 Please complete the following activities relating to this Performance Criteria:

- Activity 16

3.5 Please complete the following activities relating to this Performance Criteria:

- Activity 16

3.6 Please complete the following activities relating to this Performance Criteria:

- Activity 17

Summary

Request products and services from supplier

Forward request/s to selected supplier/s

Comply with organisational requirements in relation to placement of requests for bookings of products and services

- Purpose of contacting suppliers
- Comply with organisational requirements when forwarding requests to suppliers
- Methods to forward requests to suppliers
- Make requests for multiple services
- Request bookings and costs from suppliers
- Negotiate costs with suppliers
- Confirm costs relating to each product and service
- Identifying final supplier details and costs

Supply, clarify and confirm all information related to required products and services

Inform suppliers of required response to requests from supplier/s

Lodge or confirm formal and official booking/s

Seek, and lodge requests with, alternative suppliers as required

- Check responses to requests
- Seek alternate suppliers of products and services
- Confirm bookings
- Confirm booking information
- Check interrelated travel arrangements, times and connections
- Critical airfare checks

Element 4:
Maintain client file

4.1 Record lodgement of booking in client file

4.2 Capture and store relevant records in client file

4.4 Monitor client file

Introduction

In the previous two sections we have focused on requesting, booking and confirming bookings for various tourism products and services through suppliers.

In this section we will focus on the management of client files and the various activities associated with providing clients with all the necessary documentation they require when undertaking travel arrangements.

It is vital that the client file and relevant is maintained and managed, ensuring information and documents contained within files are accurate, up to date and understood by anyone who needs to access the file.

The importance of recording details accurately and promptly from booking profiles, files, dairies or quotations will allow all travel staff to clearly interpret this information when communicating this data to the wholesalers, tour operators, suppliers, airlines etc.

General knowledge of standard formats of booking cards or files and quotations both manual and electronic, electronic profiles on your CRS or personal systems and file diaries are essential.

An existing or new booking should be easily and effortlessly understood by all consultants who need, at any stage, to access this information and continue with the booking process.

Activities to monitor client file and records

There are many activities associated with monitoring the client file including, but not limited to:

- Confirming that responses have been received from suppliers as anticipated
- Verifying information required from client has been received as required
- Coordinating client requirements and availability or provision of services
- Checking that payments promised by client have been received
- Following-up on outstanding issues as required.

Methods to monitor client files and records

Monitoring clients' files is an important part of the booking process and generally is done using these methods:

Diary (manual and electronic)

All companies will utilise some form of hard copy or electronic diaries to ensure that all relevant actions and milestones for bookings are identified.

Ticketing time limit (TTL) in your CRS

Once you have actioned a booking, you need to ensure all correspondence has been received and actioned.

Within a computer reservation system, there is the entry 'TTL' and queues. TTL is 'ticketing time limit', the deadline as to when a booking needs to be paid and ticketed by. This deadline is put in by you when you create a booking. When this deadline arises, the computer will automatically move this booking onto a queue.

Queues are electronic mail boxes. There are general mail boxes that need to be sorted by one person daily and individual mail boxes for each member of your team. An individual queue needs to be monitored throughout the day.

Airlines use these queues as well to send you important information about your bookings.

You can also place other reminders in a booking that will automatically place it in your queue at the time and date you need it. Queues form a sort of electronic diary. To find out how to do this, you will need to speak with your computer reservations system provider (e.g. Galileo, Sabre, and Amadeus).

Emails

Emails can also help you monitor your bookings. With so much of our business coming via email, we need to stay organised. Use the email folders to keep all information together per booking. Depending on your office, you may also like to print out a hard copy of the emails and place them in client folders. Some businesses are trying to become paperless and may not encourage this.

Regardless, you will receive hard copies of information from suppliers and will need to have a folder system in place to keep this information organised.

With emails, it is important to control what you keep: delete immediately any unnecessary emails and file those you need.

Supplier online booking updates

Some suppliers will require you to log in to their internet site to keep a tab on what's happening with a requested booking. You will need to use your diary to remind you to do this. Be aware of which wholesalers do this when you action the booking, pursue this information then.

Store and maintain relevant records

Whilst every client file will differ in terms of the content contained within that need to be managed and updated by travel staff, common records include:

- Quotations
- Requests for information
- Confirmations
- Orders lodged
- Price lists and other targeted information provided by suppliers in response to specific requests.

Maintaining records for your office

You need to make precise records for yourself and other colleagues in your office. This can be done many different ways. Some offices still maintain cardboard file cards.

These booking files are the way a consultant can record details of future travel arrangements that have been conferred by the client often after many meetings and conversations.

These files need to be carefully and completely filled in with all necessary details to guarantee accuracy. This also means all persons who may deal with this file can clearly comprehend all the clients' arrangements without misunderstandings and so the client can deal with any consultant if necessary.

The record includes the following:

- Identifying information including full name (as per their passport), gender, birth date, or age
- Date of enquiry and source of referral
- Home and business address, telephone numbers and email of the clients
- Name and telephone number of the person making the booking, if applicable
- A copy of the clients passport details and any valid visas
- Documentation of health history, if applicable, for travel insurance
- Identifying information regarding flight plans, airlines and accommodation preferences, tours and special arrangements etc.

All hard and softcopy correspondence sent from tour operators and suppliers will be filed with the booking file according to the filing procedures of the company. Some companies do not maintain manual booking file cards; these companies use an electronic booking system. Client profile management, includes upload to the companies CRS making this a fabulous tool and if maintained provides invaluable historical records.

Reports can be produced from these records at any stage of the booking process for the client and consultant to identify details of on-going booking confirmations and outstanding details. There is also the advantage of not having to try and read hand writing.

Most offices have a pro forma for all their documents and for the operations of the clients' records. Ensure you fully understand these models to ensure that there is a consistency in the company. You can also record details of the booking requirements in the clients CRS reservation under notepad remarks, associated remarks and un-associated remarks.

These remarks can be downloaded into a final itinerary for the client to view and take with on their travels. Each agency will have their own policies for booking information that is recorded in the CRS.

Maintaining records for suppliers

Suppliers will generally maintain their own records. However, you need to reconfirm with them.

This can be done many different ways depending on how the product or service was booked in the first place.

- Email the provider and keep a hard copy in the clients booking folder
- Telephone, record details in the client electronic trip file notes or on the file card
- Fax and maintain the hard copy in the clients booking folder with date attached or printed as received
- Internet or through the CRS if applicable to that provider.

Maintaining records for the client

The best way to do this, is to provide the client with a fully detailed confirmation letter or invoice. Leave nothing to guesswork.

Give them all the dates, the full product and service name, who you have booked through and the costs.

Again, your agency should have a pro forma invoice for you to use. Make sure you give the client an amended invoice each time money changes hands between you both. Always ensure you date each transaction.

If you are unsure of anything, call the client to reconfirm details. Allow plenty of time before the client leaves, to allow time to make any amendments if necessary.

To be absolutely sure you have booked exactly what the client requires, write up a detailed confirmation letter, get the client in for an appointment and go through their booking thoroughly. Have a calendar and the relevant brochures and documents on hand to support you.

The agency may have a policy that the client signs the invoice before making a payment or if any amendments are made. Check with the team leader for these policies and procedures to ensure the correct procedures are followed through.

Management of the client file

Having secured a client's booking, it is now necessary to record the details of this booking on an electronic booking system or on a manual booking card. Electronic reservations and filing systems will one day lead to the demise of the manually created booking card but booking card and files are still used by many travel businesses today.

An accurately completed booking file reflects the consultant's level of competency and efficiency and your client will benefit from error-free reservations and ticketing.

The information relating to the client and the travel arrangements are recorded on the file. If the agency uses an electronic filing system, the personal information for the client is recorded for future reference and this can be assessed at any time and loaded onto an airline booking making it an extremely efficient and effective system.

Recording information in client files

Regardless of the system used to record information, all required details to be recorded must include:

- Following the user instructions that apply to the computer system in use
- Completing all required fields
- Observing all security and privacy protocols
- Verifying that all required entries have been made.

Record lodgement of booking

Regardless of the information and documents relating to a client booking that are added to a client file, steps associated with recording lodgement of bookings include:

- Including physical copy of relevant documentation in client file
- Noting time and date of lodgement.

Recording customer details

Regardless of the system used, for bookings, the following customer detail must be recorded by the travel agent:

- The full names of the passengers
- The passenger contact details, telephone, mobile, email etc.
- Date of birth for any children or infants travelling
- Source - corporate, past passenger, referral etc.
- Detail of all products and services booked.

Recording products and services booked

The following detail for products and services booked must include:

- What products and services have been booked – flight, hotel, car etc.
- Where has it been booked for – airport, city etc.
- When has it been booked for – start and end dates
- Who has it been booked for – names of passengers
- How was it booked – via an operator, wholesaler, direct, internet etc.
- Relevant booking/quote reference numbers.

It is also very important to record the status of the product or service i.e. confirmed, on request, waitlisted etc.

Ensuring accuracy of information

In many instances the detail reflected on the documentation will be directly and automatically derived from the electronic customer file. In other cases the detail must be manually extracted from the customer file and then recorded on the documentation. The specific process is office or organisation specific.

To ensure accuracy when preparing to issue documentation the following should be checked prior to commencing voucher production.

- All passenger names match their photo ID/passport
- All passenger names are correct across all items, products or services
- All items, products or services have a confirmed status
- There is date/city continuity for all items, product or services booked
- There are no unexplained gaps in the itinerary
- The booking is fully paid.

Activity 18 - Identify methods used to maintain client filed

You are required to identify three methods you would use to maintain your client files.

1. ____

2. ____

3. ____

4.3 Issue notification and documents to client

Introduction

Whilst it is important that all travel documents required for travel are provided to customers, in many cases the travel companies will provide additional information to help ensure the travel experience for customers is more efficient and that they have all essential information at their disposal.

Travel documentation will vary in content and format depending on the product or service that has been booked and who has issued the vouchers and documentation. The information reflected on the vouchers and in the documentation serves a number of purposes:

- It details for the customer exactly what has been booked and confirmed and for whom
- It advises the customer who will be providing the service
- It provides additional information for the customer in relation to the utilisation of the product or service
- It contains reference information for the supplier or operator providing the service.

Identifying travel company documents and materials

All travel companies and organisations design and produce business documents to communicate and organise information. You need to be able to identify the different documents within your company this will aid you in the booking process and assist in bringing together all the clients arrangements.

The following is a list a selection of documents and material used by travel companies as part of preparing a booking, informing clients on updates and maintaining information resources. The list will advise at what stage of the booking process these documents are made available to the client.

- Confirmation letters - Issued and sent to the client after all components of the travel arrangements have been booked and confirmed with the appropriate suppliers. It is a form of agreement between the client and consultant
- Flight itinerary - Issued and sent after the flights have been booked and confirmed according to the client's requirements
- Final itinerary - Prepared by the consultant and the tour operator as a final document listing all components of a client's journey in sequential order
- Itinerary updates - Issued and sent by the consultant or tour operator when there are changes to any component of the travel arrangements
- Invoice/Statement of account - Prepared and issued by the consultant either on completion of all travel arrangements or at interim periods and depending on the rules associated with each component
- Receipts - Issued by the consultant after total or part payments have been made either on completion of the travel arrangements or at interim periods

- Welcome home letters - Prepared by the consultant prior to clients return or after the clients has returned and can be used as an effective marketing tool

- Rail/coach tickets (e-Tickets) - Issued after full payment has been made by the client
- Insurance policies - Issued by the consultant on request of the client after part payment or full payment has been made on a travel booking
- Car/hotel/tour vouchers - Issued by the wholesalers, tour companies or by the consultant after confirmation and payment has been made
- Maps - Sourced and supplied by the consultant on request of the client. Can be part of the clients final documents
- Custom and immigration forms - Sourced and supplied by the consultant to advise clients on custom and immigration procedures as part of the clients final documents
- Visa forms - Forms sourced by the consultant and prepared by the client, it is a document or stamp in a passport allowing entry into a country for a period of time. It is issued by that countries' embassy
- Passport forms - Sourced by the consultant and prepared by the client, it is a document needed by immigration to leave and re-enter all counties

- Dossier - Issued by the tour operator containing all the detailed information for your client. A full day by day itinerary, accommodation details, guides, additional day excursions and other practical information. This can be downloaded from the internet at any time but it will always be part of the final documents
- Refund letter/credit note - Prepared by the consultant for the client after part or full payment has been made to the agency and these travel arrangements are then cancelled, and a refund is due.

Types of non-air documentation

Before we explore the steps associated with planning, preparing and issuing travel documentation it is important to identify the types of travel documentation that may be prepared.

Non-air documentation may include:

- Accommodation vouchers
- Bus/coach or other forms of transportation tickets
- Car hire/motor home vouchers
- Cruise vouchers
- Tour vouchers
- Vouchers for attractions/theme park entry
- Vouchers for any tourism product or service
- Meeting or event confirmation letters

- Delegate information packs
- Travel insurance documentation
- Confirmation vouchers
- Visa forms
- Visas
- Passport forms
- Travellers cheque requests
- Passenger itineraries
- Operational itineraries for crews including tourist guides, drivers and tour managers
- Briefing notes for crews
- Passenger lists
- Rooming lists
- Pro-formas
- Sales returns.

Types of air documentation

Before we look at how to process air documentation, it is important to identify the different types of air documentation which travel companies must either arrange, collate and manage.

Air documentation may include:

- Tickets
- Miscellaneous charge orders
- Credit card charge forms
- Exchange tickets
- Reservation alterations and re-validation stickers
- Pre-paid ticket advices.

Types of air-related tickets

Whilst there are various types of documentation, again there is a wide selection of air tickets that are available. Each type of ticket will have their own unique procedures and requirements.

Tickets to be issued may be:

- Domestic
- International
- Four-stage tickets
- Conjunction tickets.

Process air documentation & tickets

Processing of documentation for air travel is achieved by issuing the E-ticket. The deadline by which the air ticket must be issued is indicated by the type of fare purchased. Instant purchase fare types must be issued at the time of booking.

Where there is no instant purchase requirement the deadline by which the ticket must be issued is dictated by the fare type purchased. This ticketing deadline is called the Ticket Time Limit.

Again, in addition, it is advisable to enter into your diary (manual or electronic) a reminder regarding payment and ticketing deadlines for all your air bookings. The reminder date in your diary should be at least one day prior to expiry of the actual deadline.

All air tickets are E-tickets and there are two types:

- E-ticket issued online using an online airline travel agent website. These tickets are automatically issued by the airline (via their website) at the time of booking and payment
- E-ticket – electronic ticket issued via a CRS/GDS or by a third party. Once issued, E-ticket data relating to the passengers itinerary, fare, class, taxes and payment are stored in an ET record in the database of the validating airline and if applicable, the CRS/GDS.

To issue airline tickets, an agency must be accredited by the airline and IATA (International Air Transportation Association). This accreditation then permits the agency to hold ticket stock and issue tickets.

Accredited agencies may earn commission on domestic tickets that they issue however in most instances they will not.

You will find many agencies now charge the clients service fees to compensate for not making commission on domestic bookings.

E-ticket stock is provided to accredited travel agents by BSP (Billing and Settlement Plan) which you will learn about at a later date. There are a number of ways to issue E-Tickets:

- Issue at time of booking using an online airline travel agents website
- Issue via a CRS/GDS using the ticketing facility
- Issue via a Ticket Consolidator e.g. Concorde International
- Issue via the airline e.g. a group.

Remember when using an online airline travel agent website, in order to secure the seat for your passenger, the booking must be paid for in full at the time of reservation. Once the payment has been processed (almost instantaneous) the airline will auto generate the E-ticket and associated conditions of carriage etc. to the email address entered at the time that the booking is made. Generally this will be the travel agents email address.

When a booking is ticketed via an airline travel agent website, no actual ticket is issued. The passengers will instead receive an itinerary which details the flight details, the fare and taxes, the fare conditions and personal details.

E-ticket information

In the example that follows, the E-tickets have been generated via an Agents Airline Website and reflect the following:

- Full names of all the passengers
- Their airline loyalty member numbers
- The itinerary and flight details
- The airfare and the taxes
- The payment method.

Note: The taxes and surcharges are shown as one amount with the fuel surcharge shown separately. Also the credit card merchant fee is reflected on the E-ticket.

Issuing an E-ticket using a CRS/GDS

Amadeus, Galileo and Sabre all offer an E-ticketing facility.

In order to use this functionality you need to ensure that the following requirements are met:

- Agency activated for E-ticketing
- Airline/s approval for E-ticketing
- BSP advised of Airline approval for E- ticketing
- Electronic tickets assigned
- Terminal linked a printer (not a ticket printer)
- Appropriate carrier and/or CRS/GDS E-ticket training provided
- Your booking has been created in the applicable CRS/GDS.

Issuing an E-ticket using Galileo

The following is an overview of E-ticketing using Galileo:

- Create your Booking File
- Secure and file a valid fare
- Add ticket modifiers
- Add received field
- Print ticket.

These tickets are issued by the travel agent or on your behalf by a third party Ticket Consolidator.

The applicable ticket numbers are generated and recorded in the booking, by passenger. The associated paper work that is generated by this process is minimal and is only for audit purposes i.e. BSP remittance and agent records.

The passenger is provided with an itinerary and E-ticket receipt which reflects their booking reference number, name, flight details, fare and taxes paid. They may or may not be required to produce this when they check-in.

What is critical is that the photo ID produced at check-in, matches exactly the name in the booking and therefore the ticket.

In the example below, the E-tickets have been issued using a CRS and the itinerary reflects all the flight and passenger data together with the ticket numbers and payment information.

Example: CRS issued E-ticket using Galileo

```
          S U E   B A R N E T T   T R A V E L   A G E N T S
          -------------------------------------------------
                        62-66 WHITEHORSE ROAD
                           BALWYN  VICTORIA  3103
                 TEL: (03) 9816 9922   FAX: (03) 9816 9122

DATE: 23 NOV 2007                                     RECORD: LSWS7E

          YOUR TRAVEL CONSULTANT:  JULIE MOORE

ITINERARY SPECIALLY PREPARED FOR:  MOORE/RAYMONDMR
                                   MOORE/THERESAMRS


------------------------------------------------------------------------
DATE               FROM/TO               LOCAL TIME    FLIGHT DETAILS
------------------------------------------------------------------------

WED 19 DEC 07 DEP: SYDNEY                  1300   QANTAS AIRWAYS LTD
              ARR: MELBOURNE               1430   FLIGHT QF  435
                   CLASS: ECONOMY                 CONFIRMED
                   JOURNEY TIME:  01HR 30MINS     NON-STOP
                   SEAT:    UNAVAIL.
                            UNAVAIL.
                   NON SMOKING/WINDOW
                   NON SMOKING/WINDOW
                   DEP TERMINAL :TERMINAL 3
                   ARR TERMINAL :TERMINAL 1
                   WHEELCHAIR(S) TO FROM AIRCRAFT DOOR
-----------------------------------------------------------------------


 TICKET NUMBER/S:
 MOORE/RAYMONDMR                  1655172774     CA C CARD   AUD   131.40
 MOORE/THERESAMRS                 1655172775     CA C CARD   AUD   131.40

    AIR TRANSPORTATION AUD   157.66  TAX AUD   105.14  TTL AUD   262.80

                          CREDIT CARD PAYMENTAUD   262.80-
```

Some Travel Agents have their air tickets issued by a Ticket Consolidator with whom they have an account. There are two reasons:

- The Travel Agent is non I.A.T.A. and does not therefore hold ticket stock (electronic)
- Access to competitive airfares.

To request the issue of a ticket from a consolidator:

- Create or retrieve the booking in your CRS/GDS
- Place a valid fare in the booking using the fare quote facility (or note pad reflecting fare sheet reference)
- Enter payment details – using form of payment modifier or note pads
- Enter received from
- Queue PNR to Ticket Consolidator for ticketing.

The process of issuing the air tickets (by the applicable third party) will automatically record the ticket numbers in the booking. It however remains the responsibility of the travel agent to ensure that these ticket numbers are in fact received by the airline within the applicable ticketing time limit.

General ticketing overview

- One ticket per passenger is required
- One coupon per flight is required – a separate flight coupon is required for each change of carrier and for each portion of the journey where a change of flight or a stopover is involved
- Where the itinerary consists of more than 4 flights, conjunction tickets must be issued and must be of the same form code and completed in numeric order
- Flight coupons are issued in date and segment sequence
- Tickets cannot be transferred from the named ticketed passenger to anyone else
- Only IATA approved currency codes are to be used.

Note: Full ticketing and BSP processes will be covered in your BSP, various CRS/GDS and fares and ticketing training.

You will come across various hard and soft copy formats for E- tickets depending on how they were issued and by whom.

In terms of the customer, they simply receive a hard (print out) or soft copy of the actual electronically issued air ticket. All the relevant details in relation to the air booking and the ticket issued are held in the actual passenger PNR and are sent electronically to the airline. The information can be displayed in the CRS system if necessary.

When the passenger checks in for their flight, the check-in person will access the airline system and retrieve all the passenger booking details including the E-ticket details. The passenger must of course be in possession of photo identification which matches the name in the booking, failing which they will be denied boarding.

Notwithstanding the airfare rule, most domestic tickets usually have a validity of 12 months from date of issue and international tickets a validity of 12 months from date of departure.

Check all documentation for accuracy prior to issue and amend as necessary

It is important that all documentation that is received or to be issued is correct. In many cases suppliers such as airlines and other transportation providers will only provide services to people with the ‘exact information that reflects that stated on documents.

In addition, if dates are inaccurate on documents this can have detrimental effects on a person’s travel plans.

Occasionally, documentation received from a supplier or operator may not be correct. This usually happens when the vouchers are prepared and produced independently from the supplier reservation or supplier booking system.

Sometimes the error was made at the time of booking and went undetected.

Common errors to documentation

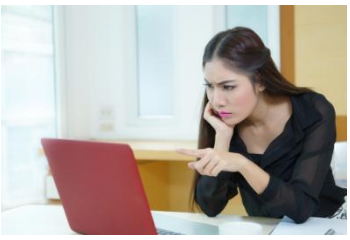
Names and titles

Typically names and titles are the subject of errors and often they are not immediately apparent.

Some examples:

- Mr Cameron Ryan - Mr Ryan Cameron
- Mrs Chen Ming Wong - Mr Chen Meng Wong
- Master. Robert Barri - Master. Robert Barry
- Miss. Charlie Khartri - Mr Charlie Khartri.

Dates and days of travel



- Days and dates that so not match
- the year itself may be wrong
- Wrong arrival or departure dates.

Times

- Wrong times – morning / afternoon.

Name of supplier

- Wrong hotel booked
- Incorrect spelling of hotel
- Wrong address of supplier.

Details of booking

- Incorrect class or classification of travel, accommodation room, mode of transportation etc.
- Incorrect package or inclusions.

Checking specific product/service information

It is important that all details of travel arrangements are checked and accurate.

Information included in specific non-air products and services have been identified below.

Car hire

- Full name of driver
- Booking reference numbers
- Company, category, type
- Pick-up and drop-off depots, the depot addresses and opening/closing times
- Pick-up and drop-off dates and times
- Inclusions and exclusions e.g. unlimited kilometres, insurance and taxes
- Special requests e.g. baby seat, ski rack, GPS
- Notes e.g. a valid international driver's license is required.

Hotel accommodation

- Passenger names
- Booking reference numbers
- Property name and address
- Room type and category
- Number of nights
- Check-in and check-out dates
- Check-in and check-out times
- Day use or late check-out if applicable
- Inclusions e.g. full buffet breakfast, arrival drinks, fruit basket
- Extra charges payable direct e.g. rollaway bed
- Special requests e.g. cot, double bed
- Special promotions e.g. hotel meal credit per room per stay.

Example: Hotel voucher

NEWMANS HOLIDAYS

Newmans Holidays Australia A Stella Travel Services Company
PO Box 505 Auckland New Zealand Email: accounts@stellatravel.co.nz
Licence No. 30204 ABN 84 003 237 29

HOLIDAY VOUCHER

To: HOTEL IBIS CHRISTCHURCH L090 Booking AW/040173-001 19 Sep 14
107 Hereford Street
Christchurch
NEW ZEALAND Ph.64 3 367 8666

In exchange for this voucher please provide a Standard Room

	Age	Meals
for MS MEGAN SULLIVAN		NO MEALS
MR JAMES WHITING		NO MEALS

In a 2 ADULTS room for 1 night
From SUN 02 NOV 14 to MON 03 NOV 14 with checkout required by 11:00 hrs (11am)
Arriving from BRISBANE on NZ804 at 23:59

Tour

- Passenger names
- Booking reference numbers
- Company name, name of tour and duration
- Departure date, time and location address
- End date, time and location address
- Type of accommodation e.g. single, twin-share
- Tour company specific baggage labels
- Hotel list – names, address and telephone numbers for hotels used on tour
- Tour information booklet
- Included services – arrival and departure transfers.

Cruise

- Passenger names
- Name of the ship and voyage number
- Embarkation date, time and port address
- Disembarkation date, time and port address
- Grade/category and cabin type and number
- Passenger dining preference
- Pre-booked special requirements e.g. gluten free diet, wheelchair.

Transfers

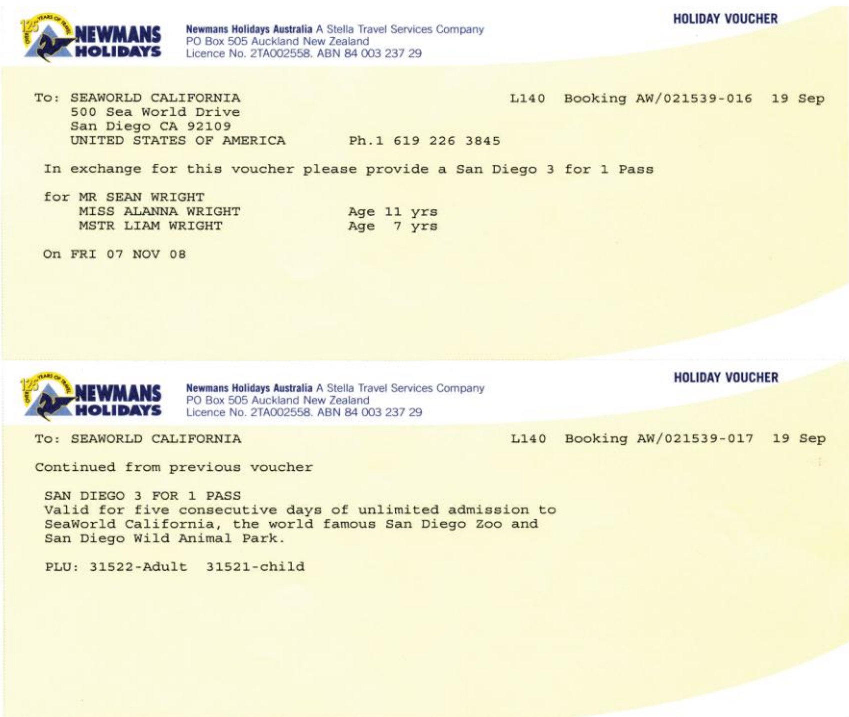
- Passenger names
- Number of adults, children, infants
- Booking reference numbers
- Name of company providing the transfer
- Local address and local telephone contact number of company providing the transfer
- Type of transfer e.g. private car, seat in coach, airport shuttle
- Pick-up date, time and location including address or terminal number
- Drop-off date, location e.g. Park Royal Hotel, Singapore
- Special instructions in relation to transfer.

Passes

There are a number of products and services that fall into the area of passes. Some examples are:

- Rail – 4 days in 8 days Scottish rail pass
- Hotel – New Zealand Inn Keepers hotel pass
- Transport – New York' Go as You Please' bus pass
- Entertainment – 3 day Disneyland pass.

Example: Theme park pass exchange voucher



NEWMANS HOLIDAYS
Newmans Holidays Australia A Stella Travel Services Company
PO Box 505 Auckland New Zealand
Licence No. 2TA002558. ABN 84 003 237 29

HOLIDAY VOUCHER

To: SEAWORLD CALIFORNIA L140 Booking AW/021539-016 19 Sep
500 Sea World Drive
San Diego CA 92109
UNITED STATES OF AMERICA Ph.1 619 226 3845

In exchange for this voucher please provide a San Diego 3 for 1 Pass

for MR SEAN WRIGHT
MISS ALANNA WRIGHT Age 11 yrs
MSTR LIAM WRIGHT Age 7 yrs

On FRI 07 NOV 08

NEWMANS HOLIDAYS
Newmans Holidays Australia A Stella Travel Services Company
PO Box 505 Auckland New Zealand
Licence No. 2TA002558. ABN 84 003 237 29

HOLIDAY VOUCHER

To: SEAWORLD CALIFORNIA L140 Booking AW/021539-017 19 Sep

Continued from previous voucher

SAN DIEGO 3 FOR 1 PASS
Valid for five consecutive days of unlimited admission to SeaWorld California, the world famous San Diego Zoo and San Diego Wild Animal Park.

PLU: 31522-Adult 31521-child

Prepare accompaniments to travel documents

The documentation provided to the customer is, often, simply pieces of paper. They are usually the only tangible item/s received which represent the exchange of monies paid for product and service. Presentation of the documentation is important and should look professional.

Where possible, in packaging and presenting the documentation use:

- Agency branded voucher covers
- Agency branded itinerary covers
- Stationery with agency logo
- Wallets if available
- Baggage labels
- Extra information
- Business card
- Insurance policy (if purchased) together with applicable emergency contact information.

Make copies of documents

It is common for travel companies to make copies of documents, whether in hard or electronic copy.

Copies of all documentation, received and dispatched, should be retained in the office for reference. How and where these are kept, will be office specific. You will usually receive or produce a combination of one or more of the following:

- Electronic or hard copy documents sent by supplier
- 'In-house' produced electronic or hard copy documents.

Back-end office applications may automatically save any 'in-house' produced documentation against the passenger file number.

Forwarding documents

Copies of documents may be supplied to:

- The relevant internal filing system
- The accounts department
- Operational personnel involved in tour delivery
- The supplier of the service to which the document applies.

Example: Travel agent confirmation and invoice reflecting payment deadlines

Great AUSSIE HOLIDAYS
We make it easy - You take it easy.

Great Aussie Holidays Pty Ltd
117 Great Eastern Highway, Rivervale, Western Australia 6103
P.O. Box 835, Cloverdale, Western Australia 6985
Phone: 08 9262 9500
Fax: 08 9478 3973
Agent Res: Freecall 1800 999 179
Email: info@greataussie.com.au
Website: www.greataussieholidays.com.au
ABN: 47 009 116 947 License No: 9TA 00271

TRAVEL AGENT CONFIRMATION & TAX INVOICE

Date:	10 September 2008	**GAH Consultant:**	Sarah Mantle
To:	Travel Counsellors Melbourne	**Party Name:**	Mr Mark Moore
		Res / Invoice No:	7539 / 56105
Address:	Level 11 636 St Kilda Road	**Total Pax:**	1
		Departure Date:	22 September 2008
	Melbourne Victoria 3000	**Agent Phone:**	03 93834343
Agent Fax:		**Agent Email:**	julie-moore@travelcounsellors.com.au

ACCOMMODATION			
Hotel:	Mantra on Hay		
Address:	201 Hay St PERTH 6000		
Room Type:	1 Bedroom Apartment	**No. of Pax:**	1
Check-In Date:	22 September 2008		
Check-Out Date:	23 September 2008		
Passenger Name(s):	Mr Mark Moore	**Age:**	Unspecified
Extras:	Nil	**Extras Total:**	$0.00
		Cost:	$215.00
Messages:			

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TOTAL COST			
Taxable Supplies:	$215.00		
Input Taxed Supplies:	$0.00	Indicated by *	
GST Free Supplies:	$0.00	Indicated by **	
Total Price inc GST:	$215.00	**GST Amount:**	$19.55
Less Commission:	$21.50	**GST on Commission:**	$1.95
Less Deposits Received:	$0.00		
Balance Outstanding:	$193.50	If paid by **Cash**	
	$218.01	If paid by Mastercard, Visa **including surcharge (1.4%)**	
	$221.45	If paid by Diners, Amex **including surcharge (3%)**	
Deposit Amount:	$100.00	**Deposit Due:**	Immediately
		Final Due:	Immediately
Deposit amount includes all air components of the itinerary which must be paid immediately to secure pricing.			

All monetary values are displayed in Australian Dollars.

PAYMENT METHODS

Money Direct: AAGH **Smart Money:** GAH00 **E Nett:** 200109

Direct Deposit: Commonwealth Bank, West Perth Branch
BSB 066 130 Account No. 10023793
(Please fax or email Great Aussie Holidays a copy of the direct deposit slip)

Cheque: Please make payable to Great Aussie Holidays. Mail to P.O. Box 835, Cloverdale, Western Australia 6985

Credit Card: If you have made your own booking online, please log in, go into your booking and click the Credit Card Payment option and complete all fields.

The system will automatically calculate the correct surcharge as per your selected card type. (Mastercard, Visa-surcharge 1.4%;Diners, Amex-surcharge 3%).

Alternatively, you can telephone our Reservations Line on 1800999179 and have one of our Reservations Staff process the transaction for you

CONDITIONS

Conditions: Great Aussie Holidays Pty Ltd is a licensed travel agent. Great Aussie Holidays in the provision of the holidays, acts solely as an agent on behalf of the principals. These principals include all land and transport suppliers including the range of hotels, coach companies, airlines, hire car, cruise and ferry companies used in the holiday, reserved by the client, and features in brochures and flyers produced and distributed by Great Aussie Holidays Pty Ltd. As Great Aussie Holidays Pty Ltd is not a principal and acts solely as an agent between the principal and the third party (client), it is not responsible for monies paid in advance to the principal by Great Aussie Holidays Pty Ltd on behalf of the third party (client), if the principal is unable to provide that service either by default, insolvency, liquidation, change of ownership or operational difficulties.

Page 2 of 2

Once all the necessary travel documents, vouchers and supporting documents have been collated, they must be dispatched to the customer in a timely and secure manner.

It is pointless going to all the trouble of arranging travel for a customer, if the end documentation is lost or does not arrive in time.

Host enterprise requirements

Each travel company will have a range of enterprise requirements that must be met when dispatching documents, including but not limited to:

- Security of the documents
- Use of preferred suppliers
- Designated method of forwarding documentation
- Recording evidence of sending of documents
- Capturing evidence that the customer has received the documents.

Considerations when dispatch documents

When dispatching documents please consider the following:

- When the passenger is departing
- Where the passenger lives – city or country area
- Where the passenger is departing from (departure city)
- Public holidays
- Contents
- Service levels associated with the various delivery options.

The answers to the above questions will give you a good indication of timing in relation to the dispatch of the documents.

Methods to dispatch documents

Provide the final documentation to the passengers using one of:

- Face to face
- Email – PDF or similar files
- Registered mail
- Post Express
- Courier or personal delivery.

Where possible, in particular with leisure travel, it is advisable to meet face to face with the customers when providing their final documentation to them. Where documentation is being produced on behalf of another consultant they will indicate how the documents will be delivered to the customer.

Activity 19 - Identify travel documents and method of dispatching

You are required to identify the travel documents you would prepare and issue to your client for the tourism products and services identified in Activities 10&11.

NON-AIR TRAVEL DOCUMENTS

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________
6. ______________________________
7. ______________________________
8. ______________________________
9. ______________________________
10. ______________________________

NON-AIR TRAVEL DOCUMENTS

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________

ACCOMPANYING DOCUMENTS

1. ______________________________
2. ______________________________
3. ______________________________
4. ______________________________
5. ______________________________

Explain how would you dispatch these documents to the client?

____

____

____

____

____

4.5 Meet requirements of scheduled future action

Introduction

The process of handling bookings and client files is an ongoing activity for travel sales staff. Changes, whether expected or unexpected, resulting from your organisation, suppliers or staff will be an everyday part of life.

The importance of being organised and having systems established to anticipate and handle scheduled and unscheduled actions cannot be underestimated.

If actions are missed, such as final deadlines for ticketing or payments of deposits etc., it can greatly impact on the client, which in turn will cause unwanted or needed stress on both your organisation and suppliers.

If you use your diary and systems effectively, the queues system of your CRS as mentioned in the last unit and by maintain all correspondence records, it will make the booking process a lot more efficient.

Most companies offer training on how to use their systems. Ensure all staff get this training early get them well equated with systems early allowing them to be effective operators.

As soon as you have to action part of a booking, put in a queue reminder in the booking, and follow up that date in your diary. Just doing this will help you with your deadline pressures.

In this section we will identify the various types of scheduled future action and explore the ways they can take place in a thorough, accurate, timely and professional manner.

Types of post-sale activities

In the absence of any changes, essential activities associated with booking travel arrangements include, but are not limited to:

- Make the reservations
- Up-dating details by schedules timelines
- Making payments at scheduled times
- Balance the finances, client has paid the correct amount and it has been dispersed to suppliers, wholesalers and operators

- Providing confirmation by set dates
- Final detailed itinerary
- Check final documentation
- Issuing document, tickets and vouchers on nominated dates
- Flight reservations have been confirmed
- Any changes to the itinerary have been advised to the customer
- Monitor changes to file after the passenger has departed.

Recording changes

Throughout this manual the causes and activities associated with changes made to quotations and travel arrangements have been identified and explained.

Recording changes may include:

- Up-dating quotation files
- Notifying relevant other personnel and departments
- Notifying suppliers, providers and carriers, where appropriate.

Meeting payment deadlines

Given that many suppliers will not confirm bookings until payments are made, there is a need for payment deadlines to be diarised. This involves:

- Collection of monies can be secured from the customer on a timely basis
- Sufficient time is allowed for these funds to clear
- Payment can be made to the supplier or tour operator by their deadline
- Air tickets can be issued
- There is sufficient time to receive and deliver documents

- Customers receive documents no later than 2 weeks prior to departure date.

Identify deadlines when making payments to ensure documentation can be dispatched

Documents for pre-paid travel arrangements are provided to the customer only after the customer has paid in full for these arrangements and the travel agent has provided that payment to the supplier or tour operator.

The deadlines for collection and payment of monies are primarily governed by the customer departure date and deadlines associated with discounts e.g. early bird offers or book and pay offers.

The deadlines for payment, by the travel agent to the supplier or tour operator, are always indicated on the booking confirmation provided by the supplier or the tour operator.

The general industry standard is 45 days prior to passenger departure date. Depending on the product booked, it can be earlier or later than 45 days prior to departure date. Payment for bookings made inside the supplier/ operator payment deadline is usually due immediately or within 7 days.

It is essential these payment deadlines are diarised (manually or electronically) so that:

- Collection of monies can be secured from the customer on a timely basis
- Sufficient time is allowed for these funds to clear
- Payment can be made to the supplier or tour operator by their deadline
- Air tickets can be issued. Most airlines have automatic cancellation policies in place. If the ticket numbers are not in the booking by the ticket deadline, the seats are simply cancelled
- Documents can be received from the supplier or tour operator by the travel agent well before the customers scheduled departure date
- There is sufficient time between the receipt (and preparation) of documents and the dispatch, such that the passenger receives them within the enterprise agreed benchmark, which is usually no later than 2 weeks prior to departure date.

Dispatching air related documentation

As a guide, industry standard is no later than 2 weeks prior to passenger departure date.

That said, it is worth considering dispatching E-tickets documents as they are issued or received. Airline tickets (e-Tickets) are normally issued after full payment has been made by the client.

Provided that you are not waiting for other documentation e.g. cruise or tour vouchers, there is no reason to hold the E-tickets in your office and not send them to the passenger. As a general rule, passenger documents, if retained in the office, are stored in a secure place, usually in a safe.

The advent of the requirement to show photo-ID when checking in for domestic travel, now, to some extent, precludes the fraudulent use of a ticket.

Many passengers, particularly leisure passengers, will come into the office to collect their E-tickets and any other documentation such as vouchers etc.

If you decide to mail the documents then please allow sufficient time for delivery and ensure they are sent using a service where the documents can be tracked, such a registered mail.

Some E-tickets such as those issued via an Airline Agents Website or a Ticket Consolidator can be emailed to the passenger if they elect this option.

Where however you have issued an E-ticket in your office using a CRS/GDS, except in circumstances where you have internal technology which facilities the emailing of the E-ticket to the customer, the E-ticket will be printed and should then be mailed to the passenger.

Communicating with past customers

Clients should be viewed as not one-off customers but lifetime clients who will return time and time again provided they receive quality service.

You should communicate with past clients on a regular basis. This communication can take many forms.

When a client returns from a trip the consultant may send a welcome-home letter or call them to see how they enjoyed the trip and to check if they were happy with the travel arrangements. They should be encouraged to tell you about their trip - both good and bad experiences. This can provide valuable feedback for future clients and possibly take the edge off what could be an aggressive complaint.

Mail outs can be used to advise clients of special offers and other travel information. Should a client refer a friend or relative to the consultant, a thank you note should be sent to the original client. Many consultants send Christmas cards to past clients thanking them for their custom throughout the year.

Many travel agencies are using computer software programs to manage lists of past clients. These programs are useful in grouping clients by destinations they have visited, products they have used or general interests. In this way information relevant to particular groups of travellers can be posted or emailed.

Activity 20 - Explain post-sales activities

You are required to identify and explain the post-sales activities you would need to perform based on the tourism products and services identified in Activities 10&11.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

4.1 Please complete the following activities relating to this Performance Criteria:

- Activity 18

4.2 Please complete the following activities relating to this Performance Criteria:

- Activity 18

4.3 Please complete the following activities relating to this Performance Criteria:

- Activity 19

4.4 Please complete the following activities relating to this Performance Criteria:

- Activity 18

4.5 Please complete the following activities relating to this Performance Criteria:

- Activity 20

Summary

Maintain client file

Record lodgement of booking in client file

Capture and store relevant records in client file

Monitor client file

- Activities to monitor client file and records
- **Methods to monitor client files and records**
- Store and maintain relevant records
- Maintaining records for your office
- Maintaining records for suppliers
- Maintaining records for the client
- Management of the client file
- Recording information in client files
- Record lodgement of booking
- Recording customer details
- Recording products and services booked
- Ensuring accuracy of information

Issue notification and documents to client

- Identifying travel company documents and materials
- Types of non-air documentation
- Types of air documentation
- Types of air-related tickets
- Process air documentation & tickets
- E-ticket information
- Issuing an E-ticket using a CRS/GDS
- Issuing an E-ticket using Galileo
- General ticketing overview
- Check all documentation for accuracy prior to issue and amend as necessary
- Common errors to documentation
- Checking specific product/service information
- Prepare accompaniments to travel documents
- Make copies of documents
- Forwarding documents
- Host enterprise requirements
- Considerations when dispatch documents
- Methods to dispatch documents

Meet requirements of scheduled future action

- Types of post-sale activities
- Recording changes
- Meeting payment deadlines
- Identify deadlines when making payments to ensure documentation can be dispatched
- Communicating with past customers

Element 5: Process final booking details for products and services

5.1 Notify supplier of required adjustments to initial booking

Introduction

As mentioned in Sections 2.7 and 5.2 of this manual, there are endless reasons why adjustments to original travel plans will take place. Please take time to review these amendments.

Regardless of the type of adjustment, it is essential that it is:

- Identified in a timely manner
- Noted accordingly in appropriate files and documentation
- Communicated with relevant parties including colleagues, suppliers and customers
- Actioned - be it changes to bookings, issuing of new documentation etc.
- Reflected in invoices.

Types of adjustments

Adjustments may include:

- Instructions received from client
- Cancellation of booking
- Change of date or time
- Change of location, venue or destination
- Re-selection of available options
- Reduction or increase in booking numbers.

Provide suppliers with any changes to the booking

When clients make changes and amendments to their booking, the supplier should be notified immediately. If the change means the supplier having to alter a product, never guarantee this change to the client unless the supplier has confirmed the change immediately.

Failing to do so, could result in a product not being available.

For example, if a client wants to change their tour dates, you will need to check the availability with the supplier before confirming the change.

If you are unsure as to whether a supplier needs to be advised of any changes, contact them. Just remember, to take action NOW. Many suppliers have a preferred method of communication. It is your responsibility to know what these are and action via this method. If they are an internet based operation, email them.

Ensure you diarise a date to check that they have responded to your email. If the change is urgent, the telephone is still the quickest and most reliable way to communicate.

When using the telephone, remember to always record the name of the person you are dealing with and ask for a hard copy of the actioned amendment to be sent through to you. This will be either by email, courier or mail.

Other important information to remember is that changes can involve fees. All suppliers charge a fee for amending a booking that has a deposit paid; refer to the booking conditions in the brochure for that particular wholesaler.

These charges can be as little as $40 or can be much higher, depending on the product and when the change is made. Changes to a tour which is due to leave within days, may incur a large fee. This is to cover the cost of issuing new documents, and sometimes loss of income.

If your client is cancelling one tour to go on another, the operator may not have enough time to fill that space on the old tour. They need to be compensated for this.

Before a client pays any money for a product or service, they are made aware of the amendment policy for the company involved.

Much of this information can be found in the booking conditions page of a brochure (normally on the back cover), or for an airfare, in the relevant fare sheet under the ‘changes and cancellations’ or ‘penalties’ section.

You, as the agent, need to consider whether you are going to charge to make changes on behalf of clients. The fees that suppliers charge do not cover the agent’s time or lost commission. Again, if you are going to charge, the client needs to be made aware of this early in the negotiations.

When it comes to making changes, take a moment now to again read the ‘Code of Ethics’ that applies to reservation procedures for airlines. These procedures can be loosely applied to all product suppliers.

Activity 21 - Identify adjustments to bookings

You are required to identify four common changes that are made to travel arrangements.

Type of change	Reason for change	Who has issued the change	Changes to booking that needs to be made	Costs associated with making changes

5.2 Pay supplier in accordance with established and/or agreed terms and conditions

Introduction

In Section 2.6 we explain the importance of collecting payment from clients for tourism products and services.

Likewise suppliers will need to be paid in a timely manner to ensure that the requested products and services requested by clients can be booked and secured.

Like in any business, the payment for products or services, either to be used directly by another organisation or on behalf of a customer must be handled in a timely manner.

In addition, if your company becomes known as a 'non-payer' it will certainly strain the ever important relationship between travel organisation and suppliers and will restrict the chance of using the supplier in the future. This is especially detrimental when dealing with suppliers in specific destinations in high demand.

Activities associated with paying suppliers

Activities associated with paying suppliers include:

- Taking into account monies already paid
- Requesting payment from the accounts department, or self-administering payment
- Conforming to approved or required methods of payment
- Ensuring timeliness of payment
- Completing relevant documentation
- Adding appropriate notifications into client file and up-dating records as required
- Factoring-in commissions due to the host enterprise.

Problems associated with non-payment or delays

As a travel organisation, where payments are delayed to suppliers this can harm:

The travel company

- Your reputation will suffer
- Suppliers may not provide products and services in the future
- Possible discounts are not available
- Late penalties may apply
- Legal action may take place.

The customer

- Products and services requested by clients may be cancelled.

Action payment

It is essential that any outstanding payments requested by suppliers are processed in a timely manner.

Action payment required by the supplier may include:

- Requesting payment from the accounts department, including processing of cheque, requisition or purchase order
- Self-administering the payment.

Process payment accurately

Payment due dates, nett amount due and payment options are specified on the supplier booking confirmation or invoice to travel agent.

It is important to ensure that the correct money due to the various suppliers are transferred to them by their deadlines and that these transactions have been recorded against your passenger file as payments made.

Types of payments

There are various methods for travel agents to use when making these payments to the supplier, including:

- Cheque – payable to the supplier and mailed
- Electronic payment – fund transfer into a bank account
- Smart money
- MoneyDirect
- BPay
- ENETT – via internet site or CRS
- Credit card:
  - Travel Agent business credit card for the nett due
  - Customer credit card for the gross due. In this instance the supplier/operator will rebate the agent commission via their preferred method.

Follow office payment procedures

Remember to consider office specific procedures in relation to:

- Cheque requisitions
- Authority level required for electronic banking
- Floor limits in relation to credit cards
- Policies regarding merchant fees for credit cards.

The total money paid out on a file, should always equal the sum total of all the nett amounts for components booked and pre-paid, plus any additional amounts paid out to cover insurance or services such as securing a visa or air tickets.

The credit balance will represent commission earned and is then transferred from the file into the applicable office account.

The timing of these transfers are office specific and are generally done automatically at the end of the month or manually and progressively during the month at the time of finalisation.

Handling discrepancies with commissions

Commission paid by the suppliers will vary. These variations are enterprise specific and depend on the marketing agreements that are in place. The default position is normally 10% for land although it can be less.

In some instances no commission is paid e.g. taxes, gratuities, membership fees etc.

In checking payments to the suppliers it is good practice to check that the commissions indicated on the invoice are in fact accurate and reflect any 'preferred' arrangements that are in place.

Your manager will provide you with a list of the office specific preferred suppliers/operators and the commission that should be received.

Following is an example Statement of Account to the Customer and an example Tax Invoice. All prices reflected are gross i.e. commission earned is not reflected on the invoice or statement of account to the customer. This is a useful document to which you can refer in instances where there are file discrepancies.

Tropical Travel

11 Beach Road,
Summerland
Melbourne 3000

Phone: (03)9439 6418
Email: troptravel@email.com
Website: www.traptravel.com

STATEMENT OF ACCOUNT

GALILEOKENNELL/JESSE DR
11 Pleasentville dr
MEL PLENTY VIC 3090

DATE OF ISSUE	02 Jun 08
DATE DUE	
REFERENCE	CC0206080001
CONSULTANT	CCT training

PASSENGER **GALILEOKENNELL/JESSE DR** **DATE DEPART** **28 Feb 2009**

SERVICE	AMOUNT EXC GST	AMOUNT TAX / LEVY	AMOUNT GST	AMOUNT INC GST
ACCOMMODATION COMFORT INN BAYVIEW Bus Service 01MAR09 Rosebud/Melbourne 20 x $156	$2,836.37	$0.00	$283.63	$3,120.00
COACH GREYHOUND 28FEB09 Melbourne/Rosebud/Melbourne 1 x $1155	$1,050.00	$0.00	$105.00	$1,155.00
TOUR RED HILL ESTATE 28FEB09 1 x $700	$636.37	$0.00	$63.63	$700.00
OTHER CHARGES ROSEBUD RSL Accommodation Comfort Inn Bayview Check In: 28FEB09 Check Out: 01MAR09	$954.55	$0.00	$95.45	$1,050.00
TOUR DOLPHIN ADVENTURE SWIM 01MAR09 1 x $1365	$1,240.91	$0.00	$124.09	$1,365.00
TOTAL	**$6,718.20**	**$0.00**	**$671.80**	**$7,390.00**

LESS MONIES PAID

DATE OF TRANSACTION	TRANSACTION DESCRIPTION	AMOUNT	PAID
02 Jun 2008	RECEIPT R000000083	$3,500.00	
TOTAL PAID			**$3,500.00**
BALANCE DUE			**$3,890.00**

Paying air tickets

Suppliers and the airline are paid only once the air tickets are issued. The timing for the issue of air tickets and therefore the payment is determined by the ticket time limit set by the airline.

If the tour operator is not issuing the air ticket as part of a package, then the travel agent will issue the air ticket and payment is made via one of:

- Passenger's Credit Card (CCCF)
- Billing Settlement Plan (BSP)
- Ticket Consolidator.

Once an air ticket has been issued, in most cases, it is not possible to cancel or void the air ticket without penalty. Application and submission of an air ticket for a refund, is time consuming and may take up to 6 weeks to be processed by the airline and there are always fees involved.

Acceptable forms of payment for air tickets and other travel arrangements are usually cash, electronic transfer or credit card.

Make sure that you have sufficient cleared funds receipted to the file to cover the cost of the air ticket, taxes and other travel arrangements that have been booked and confirmed.

Activity 22 - Explain importance of paying suppliers

You are required to explain, from your perspective, why it is essential to pay suppliers in a timely manner.

What are preferred methods to pay suppliers in your country or region? Why?

5.4 Inform supplier of final client information

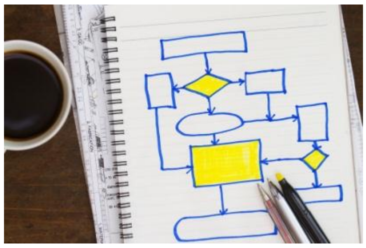
Introduction

Before providing final client information to the supplier, it is important to go over the latest documentation to ensure all details are correct on behalf of the client.

To spend a little extra time at this point, can save a lot of money in the long run.

Have the client with you when you go over final details, and check with them if there are any other requirements before departure.

You should also create a prompt, such as a check list, to reminder you to ask for details such as seat preferences, meal preferences, frequent flyer details, arrival times etc.



In essence, a checklist should aim to identify any final information that suppliers need to be aware of.

As a last resort, you should 'place yourself in the client's shoes' and methodically go through the travel activities to be undertaken by the client in a sequential manner, identifying that all necessary information has been provided by suppliers.

In many cases, it is worthwhile confirming with suppliers that they have all the necessary information they need.

Notifying final client information

The activities associated with providing final client information include:

- Complying with standard industry terms and conditions
- Complying with specific requirements of individual suppliers
- Providing final numbers for group booking
- Providing arrival and departure dates and times for all transportation types relevant to the products and services required
- Providing final name and rooming lists
- Providing details of tourist guides, tour managers, and crew accompanying clients.

Activity 23 - Develop checklist

You are required to develop a checklist to ensure that all final travel information has been confirmed and communicated with both clients and suppliers.

Work Projects

It is a requirement of this Unit you complete Work Projects as advised by your Trainer. You must submit documentation, suitable evidence or other relevant proof of completion of the project to your Trainer by the agreed date.

5.1 Please complete the following activities relating to this Performance Criteria:

- Activity 21

5.2 Please complete the following activities relating to this Performance Criteria:

- Activity 22

5.3 Please complete the following activities relating to this Performance Criteria:

- Activity 13

5.4 Please complete the following activities relating to this Performance Criteria:

- Activity 23

Summary

Process final booking details for products and services

Notify supplier of required adjustments to initial booking

- Types of adjustments
- Provide suppliers with any changes to the booking

Pay supplier in accordance with established and/or agreed terms and conditions

- Activities associated with paying suppliers
- Problems associated with non-payment or delays
- Action payment
- Process payment accurately
- Types of payments
- Follow office payment procedures
- Handling discrepancies with commissions
- Paying air tickets

Inform supplier of final client information

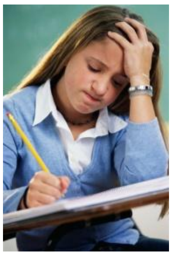
- Notifying final client information

Presentation of written work

1. Introduction

It is important for students to present carefully prepared written work. Written presentation in industry must be professional in appearance and accurate in content. If students develop good writing skills whilst studying, they are able to easily transfer those skills to the workplace.

2. Style



Students should write in a style that is simple and concise. Short sentences and paragraphs are easier to read and understand. It helps to write a plan and at least one draft of the written work so that the final product will be well organised. The points presented will then follow a logical sequence and be relevant. Students should frequently refer to the question asked, to keep 'on track'. Teachers recognise and are critical of work that does not answer the question, or is 'padded' with irrelevant material. In summary, remember to:

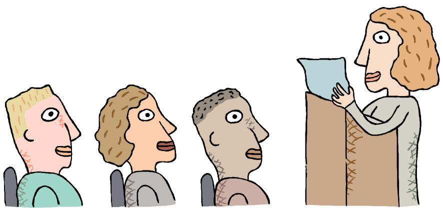
- Plan ahead
- Be clear and concise
- Answer the question
- Proofread the final draft.

3. Presenting Written Work

Types of written work

Students may be asked to write:

- Short and long reports
- Essays
- Records of interviews
- Questionnaires
- Business letters
- Resumes.



Format

All written work should be presented on A4 paper, single-sided with a left-hand margin. If work is word-processed, one-and-a-half or double spacing should be used. Handwritten work must be legible and should also be well spaced to allow for ease of reading. New paragraphs should not be indented but should be separated by a space. Pages must be numbered. If headings are also to be numbered, students should use a logical and sequential system of numbering.

Cover Sheet

All written work should be submitted with a cover sheet stapled to the front that contains:

- The student's name and student number
- The name of the class/unit
- The due date of the work
- The title of the work
- The teacher's name
- A signed declaration that the work does not involve plagiarism.

Keeping a Copy

Students must keep a copy of the written work in case it is lost. This rarely happens but it can be disastrous if a copy has not been kept.

Inclusive language

This means language that includes every section of the population. For instance, if a student were to write 'A nurse is responsible for the patients in her care at all times' it would be implying that all nurses are female and would be excluding male nurses.

Examples of appropriate language are shown on the right:

Mankind	*Humankind*
Barman/maid	*Bar attendant*
Host/hostess	*Host*
Waiter/waitress	*Waiter or waiting staff*

Recommended reading

Bhatia, A; 2012 (1st edition); *The Business of Travel Agency & Tour Operations Management*; Sterling Publishers

Davidoff, Doris & Phillip; 1995 (3rd edition); *Air Fares and Ticketing*; Prentice Hall

Mears, Lee; 2012 (1st edition); *How to Become a Travel Agent*; CreateSpace Independent Publishing Platform

Pelentay, Lori; 2013 (1st edition); *How to Sell Cruises Step-by-Step: A Beginner's Guide to Becoming a "Cruise-Selling" Travel Agent*; CreateSpace Independent Publishing Platform

Purzycki, Jeanne; 2000 (3rd edition); *Practical Guide to Fares & Ticketing*; Cengage Learning

Rastogi, K; 2007 (1st edition); *Air Travel Ticketing and Fare Construction Hardcover*; Aman Publications

Singh, K; 2008 (1st edition); *Foreign Exchange Management and Air Ticketing Hardcover*; Isha Books

Smith, Patrick; 2013 (1st edition); *Cockpit Confidential: Everything You Need to Know about Air Travel*; Sourcebooks

Trainee evaluation sheet

Book and coordinate supplier services

The following statements are about the competency you have just completed.

Please tick the appropriate box	Agree	Don’t Know	Do Not Agree	Does Not Apply
There was too much in this competency to cover without rushing.	☐	☐	☐	☐
Most of the competency seemed relevant to me.	☐	☐	☐	☐
The competency was at the right level for me.	☐	☐	☐	☐
I got enough help from my trainer.	☐	☐	☐	☐
The amount of activities was sufficient.	☐	☐	☐	☐
The competency allowed me to use my own initiative.	☐	☐	☐	☐
My training was well-organised.	☐	☐	☐	☐
My trainer had time to answer my questions.	☐	☐	☐	☐
I understood how I was going to be assessed.	☐	☐	☐	☐
I was given enough time to practice.	☐	☐	☐	☐
My trainer feedback was useful.	☐	☐	☐	☐
Enough equipment was available and it worked well.	☐	☐	☐	☐
The activities were too hard for me.	☐	☐	☐	☐

The best things about this unit were:

____

____

____

____

The worst things about this unit were:

____

____

____

____

The things you should change in this unit are:

____

____

____

____

Trainee self-assessment checklist

As an indicator to your Trainer/Assessor of your readiness for assessment in this unit please complete the following and hand to your Trainer/Assessor.

Book and coordinate supplier services

		Yes	No*
Element 1: Identify suppliers of products and services			
1.1	Identify suppliers used by the host enterprise	☐	☐
1.2	Identify products and services purchased from suppliers	☐	☐
1.3	Identify operational requirements relating to the selection and use of suppliers	☐	☐
1.4	Locate and become familiar with sources of information and resources, in relation to suppliers, services and products	☐	☐
Element 2: Identify client booking requirements			
2.1	Create client file	☐	☐
2.2	Identify specific client requirements for supplier services	☐	☐
2.3	Determine and select most appropriate supplier to meet identified client requirements	☐	☐
2.4	Prepare and supply quotation to client	☐	☐
2.5	Confirm authority to proceed from client	☐	☐
2.6	Obtain payment from client	☐	☐
2.7	Update client file	☐	☐
Element 3: Request products and services from supplier			
3.1	Forward request/s to selected supplier/s	☐	☐
3.2	Comply with organisational requirements in relation to placement of requests for bookings of products and services	☐	☐
3.3	Supply, clarify and confirm all information related to required products and services	☐	☐
3.4	Inform suppliers of required response to requests from supplier/s	☐	☐
3.5	Lodge or confirm formal and official booking/s	☐	☐
3.6	Seek, and lodge requests with, alternative suppliers as required	☐	☐

		Yes	No*
Element 4: Maintain client file			
4.1	Record lodgement of booking in client file	☐	☐
4.2	Capture and store relevant records in client file	☐	☐
4.3	Issue notification and documents to client	☐	☐
4.4	Monitor client file	☐	☐
4.5	Meet requirements of scheduled future action	☐	☐
Element 5: Process final booking details for products and services			
5.1	Notify supplier of required adjustments to initial booking	☐	☐
5.2	Pay supplier in accordance with established and/or agreed terms and conditions	☐	☐
5.3	Update client file	☐	☐
5.4	Inform supplier of final client information	☐	☐

Statement by Trainee:

I believe I am ready to be assessed on the following as indicated above:

Signed: ______________________________ **Date:** _____________

Note:

For all boxes where a **No*** is ticked, please provide details of the extra steps or work you need to do to become ready for assessment.

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