



Credits: 5

Learning hours: 50

Sector: Tourism and Hospitality

Sub-sector: Tourism

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Purpose statement

This module describes the performance outcomes, skills and knowledge required to make and administer bookings for tourism or hospitality products and services. It requires the ability to identify the customer's product requirements, request and confirm these with appropriate suppliers, and administer all bookings through to finalization. It describes the coordination of bookings with suppliers, normally a business to business supply.

Table of Contents

Elements of competence and performance criteria		Page No.
Learning Unit	Performance Criteria	
Learning unit 1: Administer customer file and identify booking requirements Learning unit 1: Administer customer file and identify booking requirements	1.1 Proper interpretation of existing and creation of new records of the customer's booking requirements.	4
	1.2 Appropriate preparations and issuing of documents and other materials to the customer.	
	1.3 Effective updating of financial status of the customer's records accurately according to organization procedures.	
	1.4 Proper identification of supplier services to be booked according to customer's requirements and requests.	
	1.5 Thorough identification of details of specific products and services which have been sold and confirmed to the customer	
	1.6 Proper selection of appropriate suppliers to ensure customer needs and prices quoted to the customer are met.	
	1.7 Proper selection of suppliers according to predetermined organization negotiated arrangements and maximizing the profitability of the sale.	
Learning unit 2: Request products and services from suppliers	2.1 Proper requisition of products and services from suppliers using the method and according to organization procedures.	15
	2.2 Effective provision of full details of the required booking to ensure the customer receives the correct product or service.	
	2.3 Systematic requisition confirmation return for all details of the booking from the supplier.	
	2.4 Methodical requisition of multiple services in the most practical sequence.	
	2.5 Systematic seeking of alternatives if requested bookings are not available and identification of action flow-on impacts, making adjustments to other bookings as required.	
Learning unit 3: Record request and confirmation	3.1 Proper recordkeeping of all bookings made, including request and confirmation, and filing according to organization procedures	18
	3.2 Regular monitoring of files to ensure that all confirmations have been received and follow up any outstanding confirmations	
	3.3 Prompt noting and scheduling of future actions to be taken in relation to bookings according to system and organization procedures	

Learning unit 4: Update and finalize bookings	4.1 Proper making of any necessary amendments or adjustments to bookings and accurately record them according to organization procedures.	23
	4.2 Proper accomplishment of payment required by the supplier at the appropriate time according to organization procedures.	
	4.3 Effective provision of suppliers with any changes to the bookings according to agreed procedures and any contractual arrangements.	
	4.4 Regular advising of suppliers of final customer details and requirements according to the needs of particular bookings and organization procedures	
	4.5 4.5 Efficient minimization of use of printed materials and maximization electronic transmission and filling of all customers supplier booking confirmation and finalization documents to reduce waste and negative environment impacts	

General introduction

Booking (reservation) is a mutual agreement between guest and hotel by which accommodations and any additional facilities of hotel are secured in advance for the future use within a specific period of time.

Reservation or room booking is an arrangement by which accommodations and any other additional services are secured in advance (booking in advance) for the future use of hotel products and services within a specific period of time.

To achieve the most important outcome of the reservation process is to have a guest room ready and waiting for the guests when they arrive at the hotel reception.

- **Supplier:** It is also known as operator. Any person or company organization that provides travel related products or services.
- **Transfers:** It is a method of transportation used of getting from one destination to another.
- **Wholesaler:** It is a travel organization that packages different supplier services
- **Quotation:** It is a statement of information and prices relating to travel activity
- **Dossier:** It is a document containing all the detailed information regarding a travel activity.
- **E-ticket:** It is an electronic ticket.
- **Document:** It is any paper or electronic form of ticket, voucher or travel related information.

Learning unit 1: Administer customer file and identify booking requirements

Learning Outcome 1.1: Interpret existing and create new records of the customer's booking requirements.

To interpret existing or create new records of customers, you must first of all have an understanding of how the travel industry operates.

Content/ Topic1:Creation and interpretationof the customer's new records.

a) Creation of new records

While creating new records of the customers, we consider the following elements:

- Booking documentation.
 - ✓ Reservation form
 - ✓ Registration form
 - ✓ Quotations form
 - ✓ Amendment form
 - ✓ Cancellation form
- Customer files:
 - ✓ 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
- Customer requests and complex product, this includes:

Sending hard copy requests

- ✓ 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
- Costing information

complex product:

b) Interpreting new records.

- Interpret supplier confirmations
- Conditions specifically applicable to the reservation

Client (customer) files 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.
- 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.

Learning Outcome 1.2: Prepare and issue documents and other materials to the customer

Content/ Topic 1. Preparation and issue documents and other materials to the customer

a. Documents and other materials to the customer

To assist the customer, preparation of specific documents is issued at certain stages of the booking. These are the documents as follows:

- Letter with brochure request
- Confirmation letter
- Flight Itinerary
- Invoice
- Final Itinerary
- Itinerary updates
- General business letters
- Credit notes
- Receipts
- Information packs
- Welcome home letters
- Coach/Rail tickets
- Airline tickets domestic and international
- Insurance policies
- Car/ Hotel Vouchers

b. Procedures of preparing a booking document.

- 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.

Ways of issuing documents to customer.

To assist the customer, preparations of specific documents are issued at certain stages of the booking. These are the documents as follows:

- a) Paper-based transmitted materials-manual
- b) Electronically transmitted materials

Example of document to be issued to customer

- **invoices:** is a documents that shows a list of goods and services and the prices to be paid for them
- **receipts:** a piece of paper on which the things that you buy or the services that you pay for listed with the total amount paid and the prices for each
- Confirmation letters information packs
- Letter with brochure request
- Confirmation letter
- Flight Itinerary
- Final Itinerary
- Itinerary updates
- General business letters
- Credit notes
- Information packs
- Welcome home letters
- Coach/Rail tickets Airline tickets domestic and international Insurance Policies Car/ Hotel Vouchers

Learning Outcome 1.3: Update financial status of the customer's records accurately according to organization procedures.

Customer's records can and will be changed many times before the client final departs and it is important that at each change the client's records are correctly and accurately updated. These changes will be done either Manually or Electronically.

Content/ Topic 3: Description of steps to follow while updating financial status of a customer records.

Steps to follow while updating financial status of a customer records

- Receiving
- Processing

- Recording payments
- Generating invoices
- Issuing invoices
- Credit notes for changed arrangements
- Checking that the customer has fully paid

Knowledge and skills in balancing customer's financial records is a vital part of working in retail travel agencies. Close attention to detail on all recorded transactions will result in correct updates and changes at all times.

Learning Outcome 1.4: Identify supply services to be booked according to customer's requirements and requests.

When a customer comes in to book a holiday, you must identify the services:

- Domestic
- International
- Mixture of both

The suppliers as either

- Internal
- External to the organization.

Content/ Topic 4: Types of supply services to be booked.

The types of supply services to be booked are as follow:

- Transportation
- Transfers
- Accommodation
- Airline flights
- Charter flights
- Entertainment
- Tours
- Cruises
- Entrance to attractions or sites
- Tour guiding services

- Activities
- Meals
- Functions
- Special items with customer's corporate branding
- Venue bookings
- Speaker services
- Audiovisual services
- Staging equipment
- Meeting or event equipment
- Special event consumable items
- Catering

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. By pre-paying most of the holiday components, benefits are realized by both the customer and the agency.

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.

A. 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.

B. 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.

C. Transfers

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

D. 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

E. Entertainment

Types of entertainment including:

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

F. 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.

G. 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.

H. Entrances to attractions and sites

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

I. Workshops, exhibitions, functions and events

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

J. Insurance

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

Learning Outcome 1.5: Identify details of specific products and services which have been sold and confirmed to the customer

You need to ensure that all parties involved in a booking have a detailed record of what has been organized on behalf of the client.

Content/ Topic 5:Details of specific products and services.

Details of specific products and services.

Customer details are:

- Date, time and location of commencement and conclusion of service.
- Any pre-negotiated costs and payment details.- Re-read the quotation document issued to customer, bill or invoice
- Nature of service to be provided.
- Itinerary
 - ✓ Duration
 - ✓ Numbers and type of attractions
 - ✓ Number of customers
 - ✓ Transport means
 - ✓ Resources
 - ✓ Tour guides,
 - ✓ Tour managers
 - ✓ Crew accompanying customers.

Learning Outcome 1.6: Select appropriate suppliers to ensure customer needs and prices quoted to the customer are met.

Content/ Topic 1:Select appropriate suppliers and Identification of customers' needs to suppliers

A. Identification of customers' needs to suppliers

Some examples of products the customer may require:

- Transportation
- Transfers
- Accommodation
- Airline flights

- Charter flights
- Entertainment
- Tours
- Cruises
- Entrance to attractions or sites

b. Activities in identifying and selection of appropriate suppliers

All travel and tourism organizations 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.

Content/ Topic 6: Ways to interpret quotations supplied to the customer

a) A quotation is a summary of costs for products and services which are provided by the travel agent to potential customers who wish to travel.

b) costs confirmed by the supplier

c) Prepare financial documents

- ✓ **Invoices** : Is a documents that shows a list of goods and services and the prices to be paid for them
- ✓ **Credit notes** : is a documents recorded all credit
- ✓ **Receipts** : a piece of paper on which the things that you buy or the services that you pay for listed with the total amount paid and the prices for each

✓ Confirmation letters information packs

Learning Outcome 1.7: Select supplier according to predetermined organization negotiated arrangements and maximizing the profitability of the sale.

Introduction

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”.

If a supplier is on the preferred list, it usually means they have been vetoed by your company. Their finances have usually been checked and passed, and any necessary licences obtained. It also means that your company has gathered other feedback on this company 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 financial company. This confidence then extends to the client.

Content/ Topic 7: Factors to consider when selecting supplier

- **Costs reduction**– if the supplier can reduce the price or give discount
- **Contractual arrangements**- the status of contract
- **Preferred supplier arrangements in place**-available of suppliers
- **Client requirements in terms of products and services**–customer needs
- Alternatives against the identified requirements for the quotation
- Comparisons and evaluations to be made prior to determining supplier to be used

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

- 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 clientNeeds
- Having competitive prices and offering value for money for yourclient
- Having a reputation for reliability, efficiency and easy payment

- Provide quality documentation
- Employ helpful and knowledgeable staff
- Pay competitive agent commission
- Have local representation.

Learning unit 2: Request products and services from suppliers

Learning Outcome 2.1: Request products and services from suppliers using the method and according to organization procedures

Content/ Topic 1: Methods of requesting products and services from suppliers

Requesting products and services can be done in many different ways and each supplier/ principle will have many methods making requesting an easy and quick process.

- Telephone
- **Fax** : A system for sending and receiving printed material (such as documents and drawings) and photographs using telephone lines
- **Email**: a system for sending messages from one computer to another computer
- **Internet and intranet**
 - **Internet**: A global computer network providing a variety of information& communication facilities, consisting of inter connected networks using standardized protocols
 - **Intranet**: A local or restricted communication network, especially a private network created using World Wide Web software.
- **Extranet**: is a private network that uses internet technology& public telecommunication system to securely share part of a business information or operations with suppliers, vendors, partners, customers or other business
- **Mail**: To send (something, such as a letter or package) by mail
- Centralized reservations system (CRS)

Learning Outcome 2.2: Provide full details of the required booking to ensure the customer receives the correct product

Content/ Topic 9: Full details of a booking and return confirmation of details of the supply

Full details of a booking may include

- A single product or service
- Multiple products and services making up a complete itinerary
- Inclusive tours or optional tours
- Groups
- Individuals
- One-off touring arrangements
- Series tours
- Incentive tours
- meetings
- Conferences.

Learning Outcome 2.3: Request confirmation return for all details of the booking from the supplier

Content/ Topic 1: Confirmation return for all details of the booking from the supplier

Before we can take deposits and issue documents for clients the booking requests must all be confirmed, this may take one day but sometimes it can take a few days depending on what product has been requested. Monitoring client's files is an important part of the booking process and is generally done daily.

a. Return confirmation of details of the supply may include:

- **Cost** : cost to be paid by customers
- **Payment method and deadline** : form of payment to be used and deadline of payment
- **Special requests**: special interests of the customer

b. When reservations for products are confirmed from a supplier it will come through:

- Ticketing time limit (TTL)
- CRS review booking (RB.)
- Courier
- Online booking procedures
- Fax
- E mail
- Mail

- Telephone

Learning Outcome 2.4: Request multiple services in the most practical sequence

Content/ Topic 1: Processing multiple bookings in response to multiple customer requests covering a range of tourism products and services

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

This will require the ability to co-ordinate effectively, the booking process from the initial request to the confirmation.

- Interpret correctly requirements and services.
- Ability to keep accurate records of bookings made.
- Ability to find this information and products as required.
- Identify codes, abbreviations and jargon.

Learning Outcome 2.5: Seek alternative if requested bookings are not available and identification of action flow-on impacts, making adjustments to other bookings as required

Finding a suitable combination of flights, accommodation, transport, insurance etc for the customer is part of the coordination process. It is recommended that the client books early or finds alternative choices if any portion of the booking components are unavailable.

Even when minor adjustments are made to a booking the flow on action can have a major impact on the booking as a whole. To avoid potential disasters, procedures are needed for checking and cross checking these adjustments.

One of these procedures is the use of a booking card or file, the accuracy of the records and the need for the information to be understood.

Content/ Topic 1: Factors to consider for seeking of alternatives and identification of action flow-on impacts

The following are the factors to consider for seeking of alternatives and identification of action flow-on impacts

- Change in price
- Availability of products
- Number of customers
- Season (climate change)

- Tourism season (high and low season)
- 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.

Adjustments to booking include:

- Cancellation of booking
- Change of date or time
- Change of location of commencement and conclusion of service
- Reduction or increase in number of bookings held

Learning unit 3: Record request and confirmation

Learning Outcome 3.1: Record and keep all bookings made, including request and confirmation, and filing according to organization procedures.

Broad knowledge of types of client records including:

- Electronic profiles
- Booking cards
- Booking files file
- Diaries
- Quotations

Content/ Topic 1: Full details of bookings made according to organization

Customer details

- Name, initial and title
- Age of any children or infants
- Contact details at home and work
- Date(s) of travel
- Places of travel

- Tourism product details
- Club membership details e.g. Frequent flyer number
- Special requirements e.g. Special meals
- Method of payment including details
- Date, time and location of commencement and conclusion of service
- Any pre-negotiated costs and payment details
- Nature of service to be provided
- Special requests or requirements.

Importance of recording details accurately and promptly from booking profiles/files/diaries or quotation will allow all consultants to clearly interpret this information when on-booking to suppliers/principles.

Information on a Booking File

There are many different formats of booking cards in existence and although the presentation of each may be different they all basically require the same types of information. The areas identified on the booking card are as follows.

1. **Names of passengers:** the passenger name should include their Christian name and title as per their passport and age.
2. **Date of departure:** enter passengers first date of departure.
3. **Nat:** client's nationality on their passport
4. **Address:** enter clients address.
5. **(H) Telephone:** enter home telephone number of client.
6. **(W) telephone:** enter business or/and mobile telephone number of client.
7. **Frequent flyer number:** enter clients frequent flyer number.
8. **Contact:** enter the name of the contact client.
9. **Booked with:** enter airline details if applicable, name of operator and date.
10. **Booking form and consultants name:** enter a booking number, if applicable and consultant's initials.
11. **Credit card details:** enter type of credit card, Master card MC, American Express AX, number on the credit card.
rel/pax: relationship to passenger if the passenger and credit card name are different, expiry date on the card.
date: enter date of transaction.
for: record here the clients purchase item in detail.
pay to: record the agency name and ask the client to sign here.

- 12. TTL (ticket time limit):** Enter the date the airline ticket is to be issued. Refer to the airfare rules.
- 13. Rec Loc. (Record locator):** enter the airline booking number referred to as the record locator.
- 14. Ticket numbers/MCO:** Enter airline or consolidator name, the date the ticket or MCO miscellaneous charge order was ordered, and the ticket number. Date adv, is date advise and this is the date of issue and your initials.
- 15. A check list:** A handy reminder for the consultant, when in the booking process.
- 16. Special Request:** enter here any special requests made by client for meals, hotels, or tours.
- 17. Air, coach or rail reservation data area:** enter flight no and airline code, class, date of departure of each flight, origin and destination cities, times of departure and arrival. Status of the flights, seat no. if applicable. Confirmed information and amount payable for airfares. per person, per person taxes and total amount per booking.
- 18. Fare basis:** Record here the name of the fare used, gross amount per person, the net amount per person, taxes per person and where the ticket is to be purchased.
- 19. Insurance details:** Enter the name of the travel insurance company, duration - length of the plan by days, months or year. Plan type usually indicated by A,B,C. pre exist are pre existing conditions, here the client needs to advise the insurance company of any health conditions prior to departure and at the time of purchase.
- 20. Auxiliary information area:** Enter other booking details such as rental car, tours, cruises and hotels City 3 letter codes, auxiliary details, dates, nights or days total, company booked with, date requested, name of operator, date confirmed, name of operator. Inclusions, enter here confirmed information and costs for each item purchased. Either by per night cost for hotels, per days cost for car hire, per tour cost and per person cost. Include upgrade costs and any inclusions over and above the standard cost listed. Always include a total cost.
- 21. Visas required:** Record the clients visa requirements, the countries and/or re entry visas. Consultant should photocopy the visa and passport and keep on file for client.
- 22. Additional notes:** Enter additional information and notes as required.
- 23. Client signatures:** Completed and dated as documents are collected, if insurance is declined, If clients obtain their own visa and cancellation/refund details are explained and given in writing. Dated and initialed by the consultant.
- 24. Payments received:** from client.
- 25. Operation paid:** Operators paid on behalf of the client.
- 26. Documents received:** Documents received from the operators. It is essential that each member of staff in an office fills out cards in an identical manner, and that complete information is provided. It

is important that at any time a staff member should be able to pick up that card/file and know exactly the state of the booking this will avoid any confusion if more than one person is referring to the booking.

Some more details that are on a booking file: When it is time for confirmations they can be recorded as the following industry accepted abbreviations and codes including:

- confirmed (KK) or (HK)
- waitlisted (WL)
- need (NN)
- request (RQ)
- ticketing time limit (TTL)
- (PU) pick up • (DO) drop off
- (Htl) hotel
- (Rt) return

Ticketing time limit (TTL) many more abbreviations will be used.

Content/ Topic 2: Methods of recording and filing bookings

Methods of recording and filing bookings are:

1. Manual storage system(files, Shelves, cabinets, drawers

A folder or box for holding loose papers together and in order for easy reference

Cabinets: A piece of furniture that is used for storing things and usually has doors and shelves

Drawer: A box that slides into and out of a piece of furniture (such as a desk) and that is used to store things.

Shelves: a flat board which is attached to a wall , frame, etc

2. Electronic storage system(software) Eg : CRS: Computer reservation system

Computer reservation systems, or central **reservation** systems (CRS), are **computerized** systems used to store and retrieve information and conduct transactions related to air travel, hotels, car rental, or other activities

Learning Outcome 3.2: Monitor files to ensure that all confirmations have been received and follow up any outstanding confirmations

Procedures of monitoring booking files:

- Ticketing time limit (TTL)
- CRS review booking (RB.)
- Courier
- Online booking procedures
- Fax
- E mail
- Mail
- Telephone
- Numeracy skills to calculate cost quoted
- Check payment status of the customer files
- Issue documents with correct monetary value

Learning Outcome 3.3: Note and schedule future actions to be taken in relation to bookings according to system and organization procedures.

Introduction

If you use your diary effectively, the queues system mentioned above and maintain all correspondence records, you will find everything falls into place. Most companies offer training on how to use their systems: ensure you get this training early and ask questions if you don't understand it. It is important to try and get on top of systems early so your time management kicks in as soon as possible allowing you to be an effective operator.

As soon as you have a date to have something auctioned by, put in a queue reminder to the booking, and stick that date in your diary. Just doing this, will keep your head above water.

Content/ Topic 1. Future actions to be taken in relation to bookings

Future actions to be taken may be:

- Reconfirmation of bookings to the suppliers, and customers, tour agents
- Date and time of presenting final list of the members of the group if applicable
- Final or partial payment for the tour

Learning unit 4: Update and finalize bookings

Learning Outcome 4.1: Make any necessary amendments or adjustments to bookings and accurately record them according to organization procedures

Accurate and fully recorded booking details are absolutely vital to ensure the customer receives the services they have booked and paid for and this also means accurate and fully recorded amendments/adjustments to the booking.

Content/ Topic 1: Description of amendments and their reasons to bookings

a) Amendment may include:

- Adding additional customers
- Splitting an existing reservation
- Cancelling a booking

SAMPLE HOTEL LOGO

Cancellation Form

Cancellation no:**Guest name:**

Arrival date:**Departure date:**

Accommodation required:**Rate:**

Remarks:

Date:**Completed by:**

- Changing an itinerary by adding or deleting products or services
- Changing customer names, if permitted
- Cross-referencing multiple bookings
- Entering invoicing details
- Entering payment details
- Entering ticketing or voucher details.

c) 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 intravel 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

Learning Outcome 4.2: Accomplish payment required by the supplier at the appropriate time according to organization procedures

Content/ Topic 1: Accomplishment of payment required by suppliers

All suppliers will issue an invoice that will advise you when the product and services need to be paid in full by. Usually payment is due 60 days prior to departure for organised tours including cruises and packages and 30 days for everything else. All suppliers due dates are different and that is why it is necessary to record and monitor these due dates correctly.

- Requesting payment from the accounts department, e.g. Cheque requisition or purchase order
- Self-administering the payment:
- Issuing a miscellaneous charges order

Types of payments

Types of payments include:

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

Learning Outcome 4.3: Provide suppliers with any changes to the bookings according to agreed procedures and any contractual arrangements.

introduction

When a client makes changes to their booking that affect the supplier, the supplier should be notified immediately. If the change means the supplier having to alter a product, never guarantee things to the client unless the supplier has confirmed the change. 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 on the availability with the supplier before confirming the change. it's all common sense

Content/ Topic 1: Factors to consider when communicating the changes with suppliers

- Type of contract
- Type of booking changes:
 - ✓ Date and time
 - ✓ Number of customers
 - ✓ Additional activities

Learning Outcome 4.4: Advice suppliers of final customer details and requirements according to the needs of particular bookings and organization procedures.

Content/ Topic 1: Final customer details and filing all documents electronically

Before final documentation is issued by the supplier, it is important to go over the latest invoice 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.

If it is possible, have the client with you when you go over these final details, and check with them if there are any other requirements. Otherwise, email or telephone them. You should also create a prompt to remind you to ask for details such as seat preferences, meal preferences, frequent flyer details etc. This is something you could easily draft up and stick on the side of your computer.

Before making bookings, particularly airline bookings, it is important for you to have witnessed the client's passport to confirm you have the correct name in the computer system. Failure to do so, could result in your client being denied boarding. Don't wait until tickets and other documents have been issued before you see the passport. You may have to reissue everything. Changing names in a flight booking is complex and sometimes cannot be done.

Final customer details are:

- Final numbers for a group booking

- arrival and departure times and flights (or any other form of transportation)
- Final name list
- final rooming list
- details of tour guides, tour managers and crew accompanying customers

Learning Outcome 4.5: Minimize use of printed materials and maximize electronic transmission and filing of all documents to reduce waste and negative environmental impacts.

Topic 1: Ways of transmitting and filing all documents electronically.

- a) **Ways of transmitting electronic documents to reduce waste and negative environmental impacts.**
- b) Email
- c) Telephone
- d) Fax

Filing is the process of storing and arranging documents according to a particular classification

Ways of filing

- **Chronological:** These documents are filed in date or time order. Most hotels will file all their reservations in Arrival Date order, with a backup system under alphabetical order being the guest's surname.
- **Numerical:** This means your documents are filed according to a number, such as a room number, account number, invoice number, or other numerical identifier
- **Alphabetical:**– Documents filed alphabetically are filed according to the first, and subsequent letter of the senders or receivers name, or according to the type of document, such as policies and procedures
- **Geographical:** Documents are filed according to a location or designated area
- **By Subject (Activities):**– Some documents cannot be filed in any other way except by their subject matter, e.g. letters of complaint, menus, wine lists
- **Arrival date:** is the date that you are expected to come to a hotel or other location.

Content/ Topic 2: Advantages of transmitting and filing all documents electronically.

- ✓ Reduction of printed materials and negative impact on environment.

Advantages and Disadvantages of Electronic Filing Systems

Electronic filing is a technologically advanced method for submitting public records, like any other system, it has both advantages and disadvantages. Electronic filing is fast becoming a favored practice when it comes to filing your taxes.

Advantage:

1. Speed

One advantage of using an electronic filing system is speed. Obviously, using technology is much faster than utilizing a local postal service.

2. Convenience and Practicality

You can save a lot of money when you practice electronic filing since you don't have to use couriers, postage stamps, and fax messaging. Since electronic filing means you don't need to send actual records and documents, you can quickly complete your forms without having to leave your home.

Disadvantage

1. Security

Filing records electronically may not be as secured as sending them via mail or post. Especially for those who employ an outside or third party service to do the electronic filing for them, you are providing identifiable information that the service may keep on file for a long period of time. This means that more individuals can have access to your information. In a particular case wherein you are supposed to receive tax refunds and you want it done immediately, you will have to provide your bank account number and routing number for the deposit to take place. Thus, your data is less secure.

Reduction of printed materials and negative impact on environment.

To reduce printed materials

Use of electronic tools like

- Email
- Computer
- Telephone
- Fax
- CRS

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