



## RQF LEVEL 3



**TORPE302**  
**TOURISM**

**Handling Post  
Event Activities**

**TRAINEE MANUAL**



# HANDLING POST EVENT ACTIVITIES



2023

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**KIGALI-RWANDA**

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## FOREWORD

Welcome to the world of Technical and Vocational Education and Training (TVET) in the hospitality and tourism sector. In an era of constant evolution and growing demand for skilled professionals, the importance of specialized training cannot be overstated. As the global hospitality and tourism industry continues to flourish, the need for competent individuals equipped with relevant knowledge and practical skills has become crucial. This collection of TVET training manuals serves as a comprehensive resource for those seeking to embark on a fulfilling career or further their expertise within the hospitality and tourism sector. Developed with meticulous attention to detail and in collaboration with industry experts, these manuals offer a wealth of knowledge, practical insights, and hands-on training exercises.

The manuals cover a wide range of topics, ranging from essential foundational concepts to specialized areas within the industry. Whether you are interested in hotel management, culinary arts, event planning, travel and tourism, or any other facet of this vibrant sector, you will find invaluable guidance within these pages. At the heart of the TVET approach is the belief that learning should be both practical and relevant. These manuals have been carefully crafted to ensure that they reflect the real-world challenges and requirements of the hospitality and tourism industry. They are designed to empower learners with the skills, competencies, and confidence needed to excel in their chosen field.

Furthermore, the manuals adopt a learner-centered approach, encouraging active participation, critical thinking, and problem-solving. Throughout each module, learners are encouraged to engage in practical exercises, case studies, and interactive activities that simulate real-world scenarios. This hands-on approach allows learners to apply theoretical concepts and develop the necessary skills that are highly sought after in the industry.

We understand that education is a lifelong journey, and these manuals have been designed to cater to learners at various stages of their professional development. Whether you are a student taking your first steps in the industry, a working professional seeking to enhance your skills, or an instructor guiding aspiring individuals, you will find the manuals to be a valuable asset.



I would like to express my sincere appreciation to the authors, industry experts, and educators who have contributed to the creation of these TVET training manuals. Their dedication and expertise have ensured that the manuals are of the highest quality and relevance.

I encourage you to embrace the opportunities presented within these pages, to explore the dynamic world of hospitality and tourism, and to unlock your potential in this exciting industry. By investing in your education and acquiring the skills offered in these manuals, you are taking a significant step towards a rewarding and successful career.

Best wishes on your journey of discovery and growth in the hospitality and tourism sector.

**Dipl.-Ing. Paul UMUKUNZI**

**Director General/ RTB**

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## ACRONYMS

**RTB:** Rwanda TVET Board

**TVET:** Technical and Vocational Education Training

**AIDS:** Acquired Immunodeficiency Syndrome

**BK:** Bank of Kigali

**CRS:** Computer Reservation System

**EAC:** East African Community

**EBM:** Electronic Billing Machine

**HIV:** Human Immunodeficiency Virus

**KCV:** Kigali Cultural Village

**POS:** Point of Sale

**STI:** Sexually Transmitted Infection

**TOR:** Tourism

## INTRODUCTION

Welcome to the training manual for the hospitality and tourism sector, specifically focused on the trade of tourism. This manual, titled "Handling post event activities," is designed to provide comprehensive training for individuals seeking to enter or improve their skills in the industry.

The manual is structured into three units, each of which covers a critical aspect of handling post event activities. These units include preparing for clients' departure, clean and maintaining store and inventory and maintaining documentation.

This manual is not a typical textbook-style approach to learning, but rather an interactive learning experience. It comprises of discovery activities that allow learners to explore and discover concepts, problem-solving activities that require learners to think critically and come up with solutions, guided practice activities that provide step-by-step instructions, and application activities that encourage learners to apply their newly acquired knowledge in real-life scenarios.

Additionally, the manual includes assessment activities, which provide learners with feedback on their progress and help them identify areas where they need to improve.

By the end of this manual, learners will have gained a comprehensive understanding of tourism, and be equipped with the necessary skills to provide excellent customer service in any hospitality setting. Let's get started!

## **Module Units:**

**Unit 1: Prepare for client's departure**

**Unit 2: Clean and maintain store inventory**

**Unit 3: Maintain documentation**

## UNIT 1: PREPARE FOR CLIENT'S DEPARTURE



1



2

Figure 1: Prepare for client's departure

### Unity summary:

This unit describes the knowledge, skills and attitude to organize the departure of passengers from their location by identifying departing clients, collecting client's feedback, applying check-out and briefing visitors on departure papers and personal identification documents required for transfer from accommodation to departure location. The tour has come to an end and now it is time to assist visitors with their departure.

<sup>1</sup> Cited, Alan Hickman (2015) Provide arrival and departure assistance, ASEAN Website: [www.asean.org](http://www.asean.org).

<sup>2</sup> Cited, Alan Hickman (2015) Provide arrival and departure assistance, ASEAN Website: [www.asean.org](http://www.asean.org).



## Self-Assessment: Unit 1

1. Look at the illustration. What is happening? What do you think this learning outcome will be about?
2. Fill in the self-assessment below.

There are no right or wrong ways to answer this survey. It is for your own use during this course. Think about yourself: do you think you can do this? How well? Read the statements across the top. Put a check in column that best represents your situation. At the end of this learning outcome, we'll take this survey again.

<b>My experience</b>	<b>I don't have any experience doing this.</b>	<b>I know a little about this.</b>	<b>I have some experience doing this.</b>	<b>I have a lot of experience with this.</b>	<b>I am confident in my ability to do this.</b>
<b>Knowledge, skills and attitudes</b>					
Describe the Departing clients					
Identify the departure activities					
Collect client's feedback tools					
Use the client's feedback tools					
Apply check-out activities					
Organize the departure of passengers from their location					
Verify departing passengers					

## Key Competencies:

Knowledge	Skills	Attitudes
1. Describe the Departing clients	1. Organize the departure of passengers	1. Diligent
2. Identify the departure activities	2. Apply check-out activities	2. Open-minded
3. Verify departing passengers	3. Apply check-out activities	3. Attention to details



## Discovery activity



### Task:

1. What is a 'departure list'?
2. What details might you check for departing passengers?
3. What is the necessary tool may be used to verify departing passengers?
4. Detail the procedures you would follow when organizing departure of passengers from their location.
5. Identify what methods may be used for gathering feedback

## Topic 1.1: Identifying the departing clients



### Activity 1: Problem Solving



#### Task

Before departing from any location, you need to gather your group together and verify that everyone is ready to depart for the next destination.

- Explain what checks need to be made regarding check-in of departing passengers.
- What documents would departing passengers need to have in order to check-in?

#### Key Facts: Identifying the departing clients

##### Identification of the clients

- ✓ Categories of clients for tourism events

To identify the categories of clients for tourism events, we can refer to those events, which may include the following:

##### **Business**

Business travelers can comprise:

- ✓ FIT (Free Independent Travelers) who arrange their own accommodation
- ✓ Member of a corporation in which has a special rate with an organization.
- ✓ Conference or event guest within a hotel.

##### **Leisure**

This market is travelling for relaxation purposes and may include:

- ✓ FIT (Free Independent Travelers) who arrange their own accommodation
- ✓ Tours / coach groups
- ✓ Honeymooners

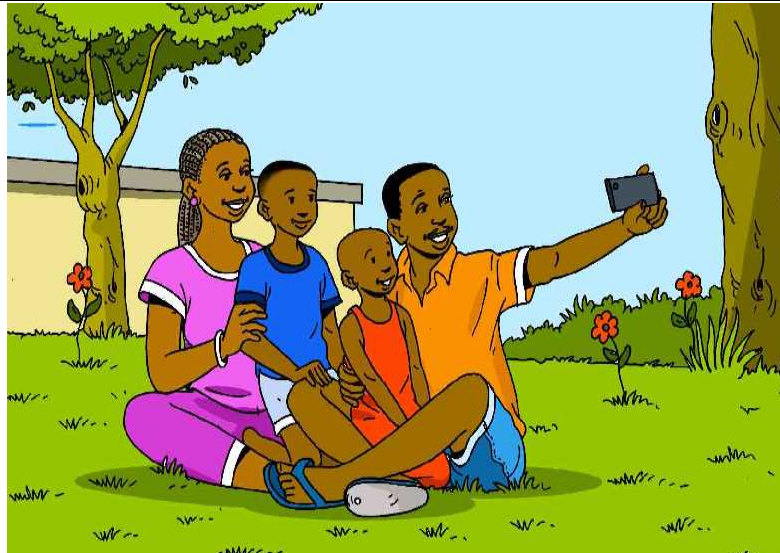


Figure 2 Identification of the clients

- ✓ Families
- ✓ Elderly.

#### **Religious**

- ✓ This market is travelling to participate in a pilgrimage or religious celebration

#### **Sporting**

- ✓ This market is travelling to participate in sporting events, tours or competitions

#### **Outbound Tourists**

- ✓ An outbound tourist is where a local tourist goes to a region away from where they reside and where the business is. This normally means the tourist is either leaving the town, city or country. This type of tourist would be beneficial to travel agents and transport companies.

#### **Inbound Tourists**

- ✓ An inbound tourist is where a tourist from another location comes into your region. This normally means the tourist is coming into your area.
- ✓ This type of tourist would be beneficial to accommodation venues and tourist attractions.



Figure 3 International Tourists<sup>3</sup>

### ***Domestic Tourists***

- ✓ A tourist who travels within a country; they are natives and it's easy to promote to them.

### ***International Tourists***

- ✓ A tourist who travels to/from another country; conducting promotional activities can be harder as they may come from various countries, speak different languages and have different needs.
- ✓ Cultural events
- ✓ Research events
- ✓ Business events
- ✓ Entertainment events
- ✓ Religious events
- ✓ Dark tourism events
- **In order to identify the clients record, the following details are needed:**
  - ✓ Guest name (and group name, if applicable)
  - ✓ Guest's home or billing address
  - ✓ Guest's telephone number, including area code
  - ✓ Name, address, and telephone number of guest's company, if appropriate
  - ✓ Name and other pertinent information about the person making the reservation, if not the guest
  - ✓ Number of people in the group, and perhaps ages of children, if any.
  - ✓ Arrival date and time
  - ✓ Number of nights required or expected departure date,
  - ✓ Reservation type [Guaranteed versus Non-guaranteed]
  - ✓ Special requirements [i.e. infant, disabled guest, or no smoking accommodation]
  - ✓ Additional information, if needed [i.e. late arrival, method of transportation, flight number, room preferences, etc.]

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<sup>3</sup> Cited, Alan Hickman (2015) Provide arrival and departure assistance, ASEAN Website: [www.asean.org](http://www.asean.org).



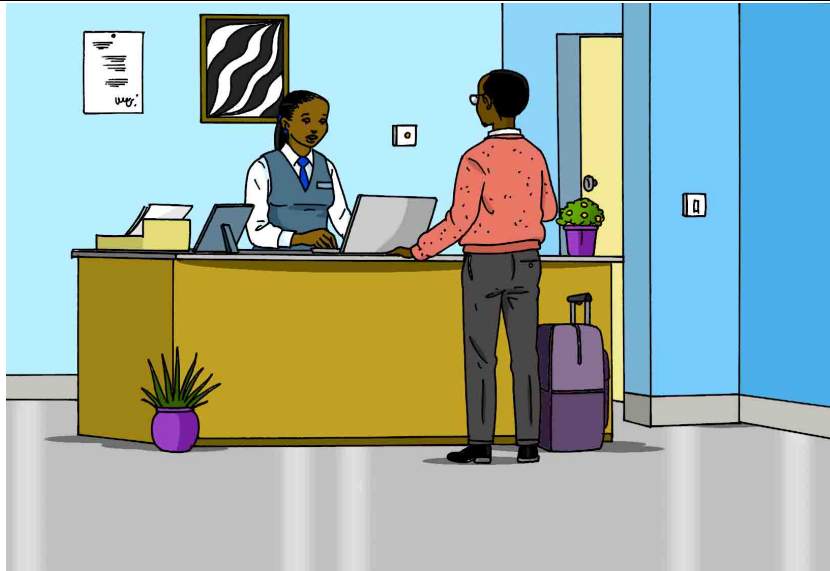


Figure 4: The clients record

- **Identifying the departure details**

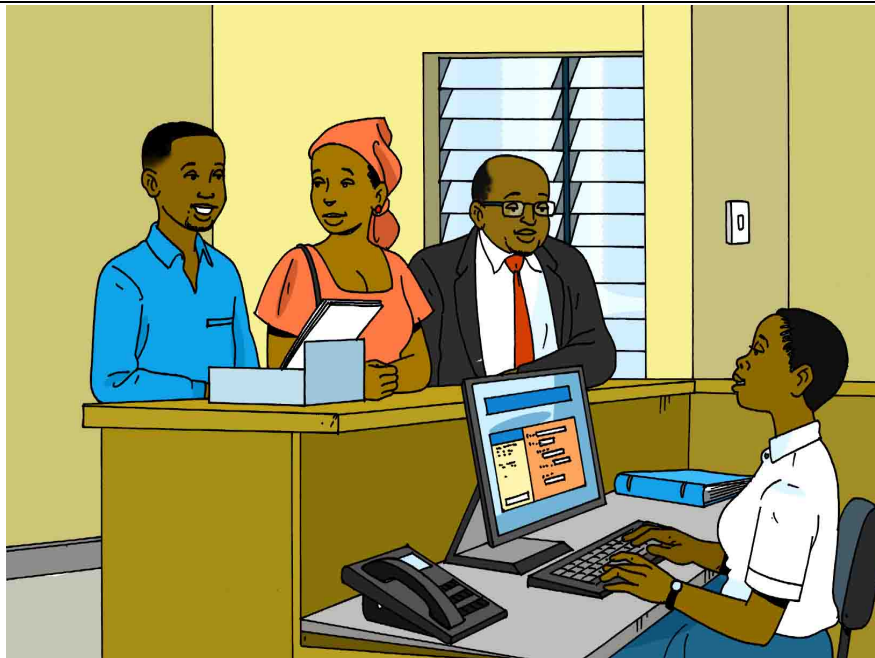
Verify the departure details may include:

- ✓ Checking departing passengers against documentation, such as a Departures List and/or Passenger Manifests
- ✓ Departure time
- ✓ Number of departing clients
- ✓ Payment details
- ✓ Departing clients' luggage
- ✓ Departing clients' identification
- ✓ Special and extra services to offer to departing clients
- ✓ Confirming the identity of departing passengers
- ✓ Checking the documentation of departing passengers
- ✓ Confirming baggage details.

- **Confirmation of documents for departing clients**

Confirming basics of the tour – in relation to knowledge of:

- ✓ Itinerary
- ✓ Passport
- ✓ Tickets
- ✓ Bills
- ✓ National Identity Card, Passport or other personal information documents



*Figure 5 Confirmation of documents for departing clients*

- ✓ Receipts and proofs of payments
- ✓ Registration form
- ✓ Departing clients' checklist
- ✓ Departing clients' files
- ✓ Visiting cards
- ✓ Voucher

**Pre-tour briefing helps the guide to tailor information to the needs of the group. He should be briefed about:**

- ✚ Greet the client at first with hand shake. Have eye contact with the client.
- ✚ Take every opportunity to use your name.
- ✚ Use words that you are comfortable with. Do not use complex words you cannot pronounce.
- ✚ In the coach from International airport to hotel- brief introduction of self and of Toru and details of procedure for check in and brief on the day of programmer. Hand over the page for passport details.
- ✚ On arrival of tour group (at hotel), seat client in lobby, and ask them (politely) to fill passport details.
- ✚ Distribute keys.

- ✚ Give the details of the day's programme- the wakeup call & meal timings, departure time etc.
- ✚ Introduce the driver and cleaner/ helper/ assistant to clients (tourists).
- ✚ Inform them regarding clients (tourists) feedback forms, and distribute it in the coach.
- ✚ Handout the organization kit (Cap, shoe-covers, hand baggage, passport or document holder pouch) to clients in the coach.

### General Briefing

- ✚ Transport: Coach condition, leaving condition & precautions: camera, passport, cap, hand bags etc.
- ✚ Tips: Give a brief to clients regarding tips in general & also specific. They should carry small change.
- ✚ Clothes: Types of clothing to wear during the tour (sightseeing etc.).
- ✚ Weather: Should dress in accordance with the temperature, humidity, carry light woolen or not in the coach etc.










Figure 6: Briefing

- ✚ Currency and cheque: The equivalent in their currency, should always count the money received when changing currency.
- ✚ Food: What to expect and what to avoid.
- ✚ Post: where to buy stamps etc.

### **Collecting resources relevant to the tour to be conducted**






This can require:

Obtaining and checking guide kit – as appropriate for the individual needs of specific tour types which will contain essential items to enable the effective and safe conduct of the tour, such as:

-  Maps
-  First aid kits
-  Communications devices
-  Pen and paper and nominated internal forms
-  Contact List
-  Tour notes and script for commentary
-  Prop kit

### **Confirming tour details**

This can embrace the need to:

-  Verbally provide itinerary details – highlighting points of interest and special events and arrangements
-  Distribute materials – such as name tags, itineraries, tickets, vouchers, handouts, tour materials
-  Include a Q & A session – so participants have an opportunity to clarify issues, ease anxiety and obtain answers to their pressing questions/concerns
-  Mention potential hazards – and identify safety protocols and emergency measures which have been established
-  Explain tour group management protocols to ensure safety of all and no-one is separated from group or 'lost' on tour



## Activity 2: Guided Practice



### Task:

A group of 6 tourists has just spent 10 days in Rwanda, primarily to experience the recreational activities offered in Volcanoes National Park. At the end of their trip, they have decided to return to their place of origin. As someone skilled and specialized in handling departures;

- ✓ Explain how to collect feedback from the clients
- ✓ List at least five tools and equipment you may collect before organizing client's departure



## Activity 3: Application



### Task:

Visit the nearest tour company that specializes in organizing tours for tourists to acquire skills in arranging client departures. Then participate in the following activities:

- ✓ Identify the different ways that can be used to identify the departure clients
- ✓ Verify the departure details
- ✓ List and complete documents for departing clients



## Topic 1.2 Selecting the client's feedback tools



### Activity 1: Problem Solving



#### Task

You are required to identify how you evaluate the success of your organization's sales activities if you were the manager of a tourism organization.

WHAT WOULD YOU EVALUATE?	HOW OFTEN WOULD YOU EVALUATE?	HOW WOULD YOU EVALUATE?

#### Key Facts: Selecting the client's feedback tools

##### ✓ Evaluation methods

**Specific activities that may be part of the evaluation process include:**

- ✓ Interviews with staff and customers
- ✓ Comparison of actual sales or revenue statistics with expected or target figures
- ✓ Analysis of data collected – such as databases, customer feedback and market research data
- ✓ Review of the budget – to determine whether or not the promotion came in on, under or over budget
- ✓ Telephone interview
- ✓ Telephone calls or SMS
- ✓ Focus groups
- ✓ Testimonies

- ✓ Social media
- ✓ Third party feedback
- ✓ Use testing

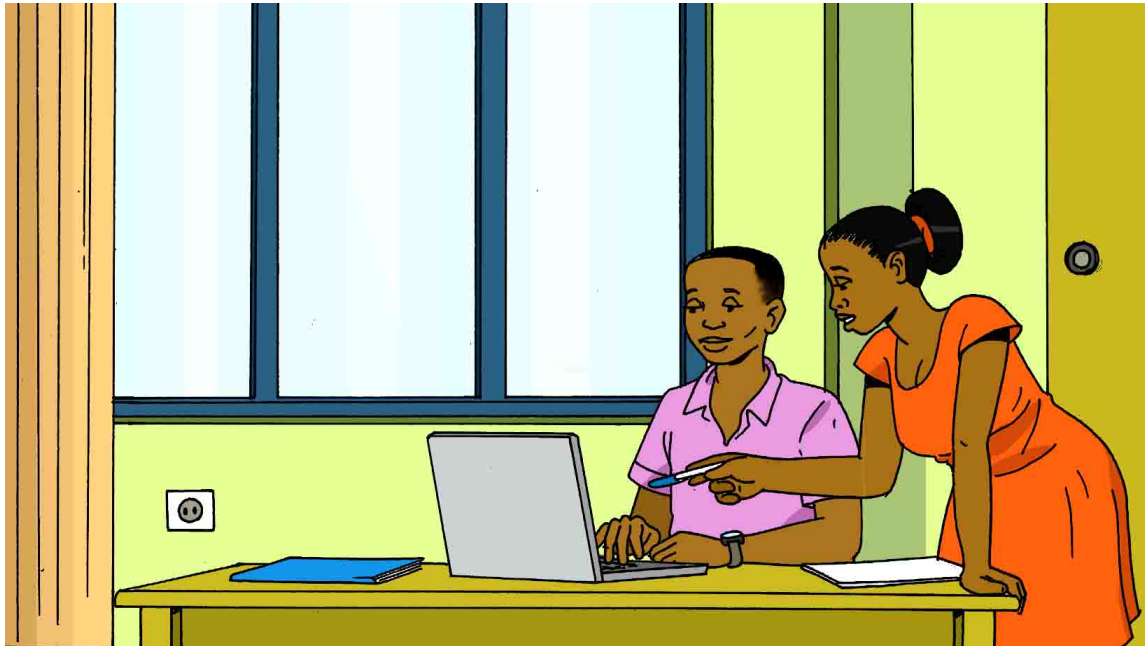


Figure 7: Evaluation methods

- ✓ Consideration of ancillary benefits and problems that arose. Some promotions generate unanticipated spin-off benefits such as extra sales, higher levels of customer traffic, more media exposure than expected etc.
- ✓ In addition, some present un-anticipated problems such as disgruntled regular customers unhappy with the changes brought about by the promotion or lost opportunity cost.

### **The requirements for the evaluation**

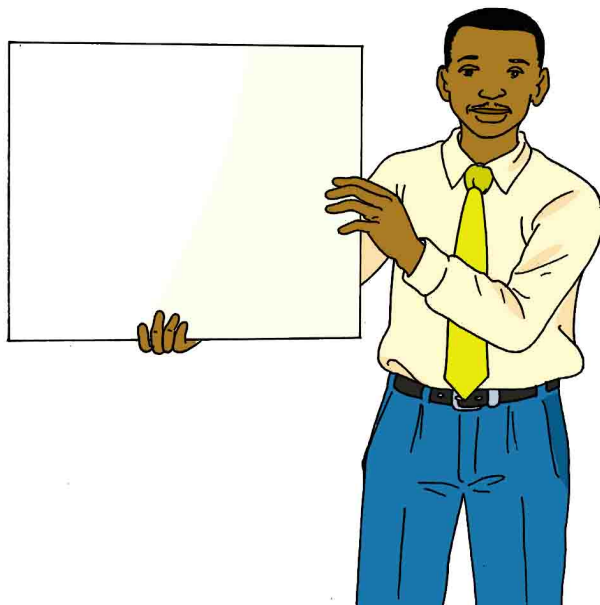
Generic questions to be answered during evaluation may include:

- ✓ Did we meet our objectives?
- ✓ Did we get the response from the intended audience we were aiming to achieve?
- ✓ What aspects of the promotion worked and why?
- ✓ What aspects of the promotion didn't work and why?
- ✓ What customer feedback was received?
- ✓ Did we successfully cater for the demand we created?
- ✓ Are the existing objectives relevant or should be refined or create new objectives?

- ✓ **Requirements to evaluate clients' feedback**
- ✓ Availability of data to evaluate
- ✓ Availability of evaluation tools
- ✓ Availability of well-defined evaluation purpose
- ✓ Availability of evaluation resources

#### **Quantitative data**

- ✓ Actual sales generated
- ✓ Number of different packages sold



*Figure 8: Quantitative data*

- ✓ Sales of specific tourism products and services
- ✓ Number of contacts or prospects
- ✓ Number / Percentage of bookings in relation to sales
- ✓ Performance of different market segments
- ✓ Sales mix.

#### **Qualitative data**

- ✓ Feedback from clients or colleagues
- ✓ Booking patterns

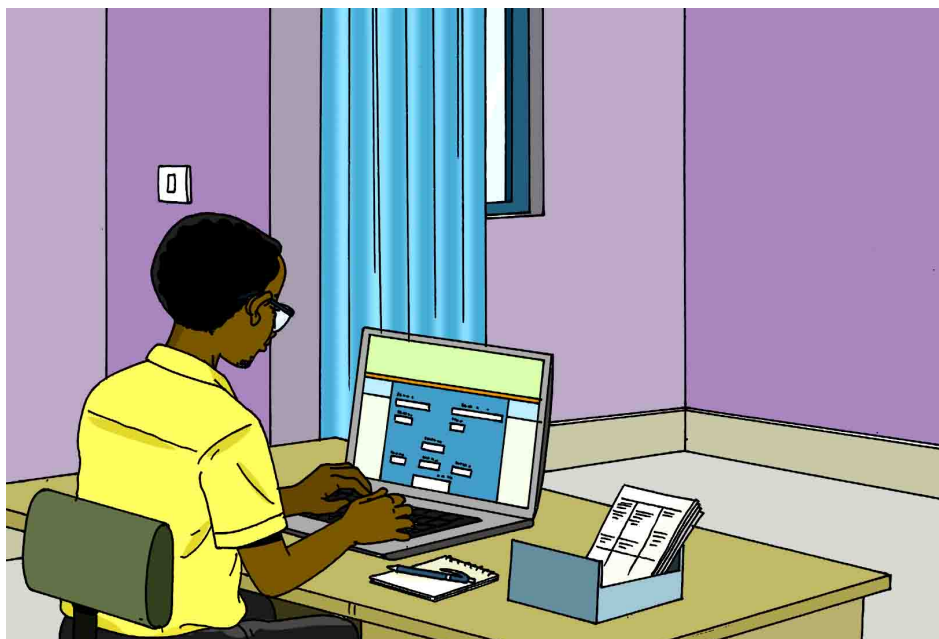


Figure 9: Qualitative data

- ✓ Client satisfaction levels
- ✓ Effectiveness of sales staff in prospecting new clients.

### **Designing client feedback tools**

There are a variety of methods management and staff can use to collect feedback from clients.



Regardless of the method used to collect information, it is vital:

- ✓ The form is designed to gather important information about all aspects of service delivery

- ✓ The format is easy to use for the customer
- ✓ The form is presented to the customer when it is going to cause the less inconvenience
- ✓ The customer is thanked for their feedback, whether in the form of a gift or other suitable reward.

### **Sales monitoring activities**

#### **Monitoring sales activities may include:**

- ✓ Evaluating the results of different sales activities with reference to the nominated key performance indicators and sales objectives established by the organization
- ✓ Identifying the sales turnover achieved by our sales team
- ✓ Track the performance of our sales team and develop appropriate strategies to help them perform better
- ✓ Evaluating the sales performance of individuals in the organization
- ✓ Determine trends in sales and consumer preferences
- ✓ Distinguish between strong and weak products / services
- ✓ Better understand the performance of our products and services and determine how to exploit their strengths and enhance their weaknesses.
- ✓ Evaluating the success of different packages advertised to clients
- ✓ Identifying satisfaction level of clients who have undertaken packages prepared by the organization
- ✓ Identifying innovative package suggestions
- ✓ Make better sales forecast and set more realistic sales targets in future.

#### **Reasons for collecting clients' feedback**

- ✓ To improve products and service
- ✓ To measure customer satisfaction
- ✓ It shows you value clients' opinions
- ✓ Creating the best customer experience
- ✓ To improve customer retention
- ✓ Customer feedback is a reliable source of information to other consumers
- ✓ To take business decisions



## Activity 2: Guided Practice



### Task:

The group of tourists have experienced the destination attractions and services of Rwanda. As a good tour operator,

1. List feedback tools you can use to ensure customer departure satisfaction
2. Describe why the online feedback tool is the best for collecting customer feedback



## Activity 3: Application



### Task:

You are required to research and collect evidence of a:

- Client comment card
- An online feedback forms.
- You are then required to prepare your own client feedback form which includes opportunities for feedback in all areas you consider to be important to you.

## Topic 1.3 Collecting the client's feedback



### Activity 1: Problem Solving



#### Task

If it has not been organized as an activity before the group arrives for their tour, it is too late to do so when on tour – the risk of accidents and subsequent legal action is too great. So seeking feedback from the group throughout the experienced tour involves many activities and techniques including encouraging questions and responding to them in a way which demonstrates questions really are encouraged and appreciated.

- Identify different arrangements for feedback activity
- List different ways that can be used to receive feedback from departing clients

#### Key Facts (Indicative contents)

- **Making arrangements for feedback activity**

Contact customers for feedback about their reservation



Figure 10: Arrangements for feedback activity

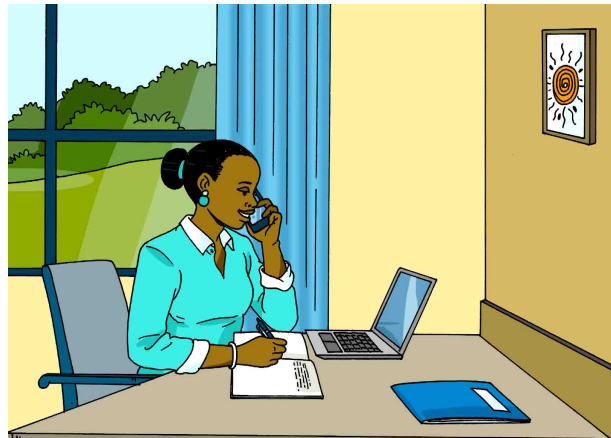
This may require:

- ✓ Distributing feedback forms
- ✓ Encouraging completion of Customer Comment Cards
- ✓ Mentioning online feedback options
- ✓ Talking to people about their tour and experience
- ✓ Seeking contributions for improvements and changes to the tour
- ✓ Asking if people have complaints
- ✓ Actively soliciting feedback and listening to and recording responses
- ✓ Thanking people for their input/feedback.

- **Receiving feedback on facilitators**

- ✓ Client comment cards
- ✓ Online feedback
- ✓ Forwarding feedback received.
- ✓ Their professionalism and uniqueness in product and service delivery
- ✓ How they treated clients with enough customer care
- ✓ How they have been empathetic to clients
- ✓ Their negative or positive attitudes when dealing with clients
- ✓ Their skills and experience in clients' problem solving
- ✓ What they should improve in service and product delivery

- **Receiving feedback on tools and equipment**



*Figure 11: Receiving feedback on tools and equipment*

These may relate to:

- ✓ Quality
- ✓ Appropriateness
- ✓ Usability
- ✓ Effectiveness
- ✓ Return of equipment
- ✓ Return of materials and props
- ✓ Return of keys
- ✓ Return of vehicles

- **Receiving feedback on the other facilities and services**



Feedback may be related to Other facilities and services on which feedback may be collected include the following:

- ✓ Toilet provision
- ✓ Waste and recycling facilities
- ✓ Security
- ✓ Electricity supply
- ✓ Water supply
- ✓ Parking facilities
- ✓ Communication facilities
- ✓ Transportation facilities



## Activity 2: Guided Practice



### Task:

A group of departing clients has informed you that they wish to extend their stay at the destination but with a different tour guide.

- What ways may be used to collect feedback in order to identify the cause?
- If they decide to continue with the first guide, will the feedback tool be designed the same way as before?
- Provide examples of various key indicators that may be included in each feedback tool



### Activity 3: Application



#### Task:

Visit a local tour company where clients who are ready to depart have arrived. The company ensures that they conclude the tour by conducting a variety of standard industry "end-of-tour" activities. These activities are specifically designed to gather feedback from the clients and leave a positive impression, which in turn encourages them to consider repeat visits or refer the company to others. Please confirm with the tour officer their availability to provide a tour and address any inquiries the clients may have.

Tell trainees to work on the following questions.

- Identify the methods used to get feedback by that company
- Design the feedback form that may be completed by departing customer

They should each add one of their own questions to first question during their visit.

Tell trainees to interview the farmer about best practices for gathering feedback during the departure of visitors.

After the visit, facilitate a class discussion on their experience, addressing the following questions:

- a) What did you learn?
- b) What information from the officer surprised you?
- c) What would you do differently?

## Topic 1.4: Applying the check-out procedures



### Activity 1: Problem Solving



#### Task

Assume that you are working as a tour operator, and at the end of the tour, you are responsible for collecting the tools and equipment used by customers who are preparing to depart from Volcanoes National Park. These customers have experienced all the tourism activities available in the park. Your task is to ensure that all the tools and equipment are properly accounted for and collected from the customers before they leave the park:

- ✓ Identify the tools and equipment as may be used when tourism in VNP
- ✓ Mention different ways you can consider while receiving tools and equipment
- ✓ What documentation would you use to receive items delivered to your workplace?

#### Key Facts; Applying the check-out procedures

##### ✓ Check out procedures

**Check out:** It is the action of leaving a place where you were accommodated such as a room in a hotel, motel, or campsite after finishing staying there.

- ✓ Inform reception to keep bills ready and hour prior to clients' departure to avoid last minute delays.

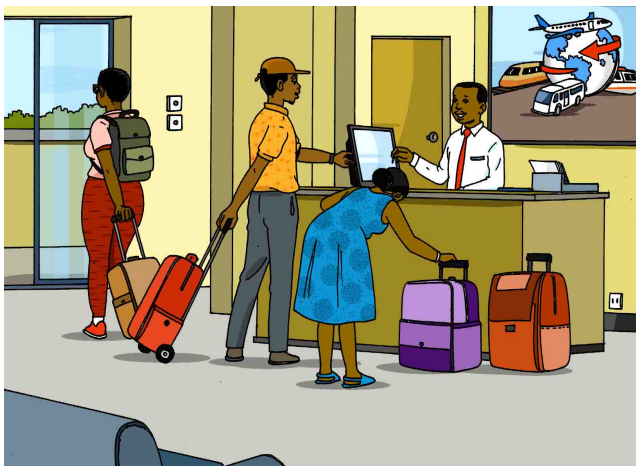


Figure 12 Applying the check-out procedures

- ✓ For check out, personally do the baggage count &
  - ✓ Ask the client to identify baggage before loading in the coach.
  - ✓ Make sure all vouchers are signed before handing over the ground handling agents or to hotel.
  - ✓ Make a separate note of the changes made in the voucher & mention same in the tour report.
  - ✓ Ensure that all hotels keys have been returned.
  - ✓ In the coach ask the client to verify if they have all their belongings with them before leaving the hotel.
- **Factors to consider when receiving tools and equipment**
    - ✓ The returned number comparing to the given number
    - ✓ The number of damaged
    - ✓ The number of the lost
    - ✓ The quality of the returned comparing to the quality of the given
    - ✓ The number of the used, especially consumables
  - **Receiving the tools and equipment**

Activity-related physical resources – which may include:

- ✓ Personal Protective Equipment (PPE) – safety equipment;
- ✓ Sports gear;
- ✓ Props – items that can help you explain the activity;
- ✓ Costumes – something interesting to wear in an activity – e.g. Hat or robe; and/or equipment and items specific to each individual activity.



Figure 13 Receiving the tools and equipment<sup>4</sup>

<sup>4</sup> [https://www.freepik.com/free-vector/camping-colored-isolated-icon-set-with-equipments-elements-outfit-hiking-vector-illustration\\_9376964.htm#query=camping%20equipment&position=25&from\\_view=keyword&track=ais](https://www.freepik.com/free-vector/camping-colored-isolated-icon-set-with-equipments-elements-outfit-hiking-vector-illustration_9376964.htm#query=camping%20equipment&position=25&from_view=keyword&track=ais)

## Tools and equipment receiving procedures

- ✓ Counting tools
- ✓ Tools' status evaluation
- ✓ Cleaning tools

### • Recording tools and equipment

All companies will utilize some form of hard copy or electronic records to ensure that all relevant actions and milestones for tour are identified.

Most travel agents use one of the following methods to record the detail of the products and services booked as well as tools and equipment as used per customer, their status and other relevant customer detail.

- ✓ A totally manual system

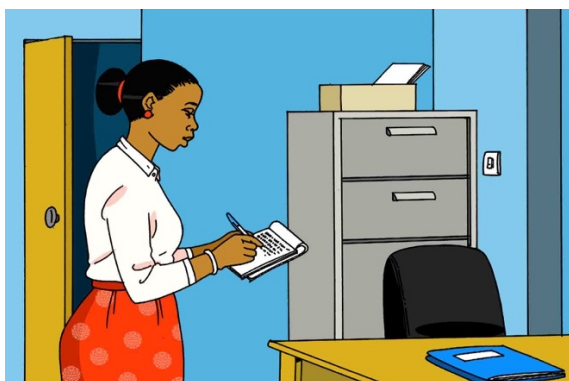


Figure 14: Recording tools and equipment

- ✓ A totally electronic system

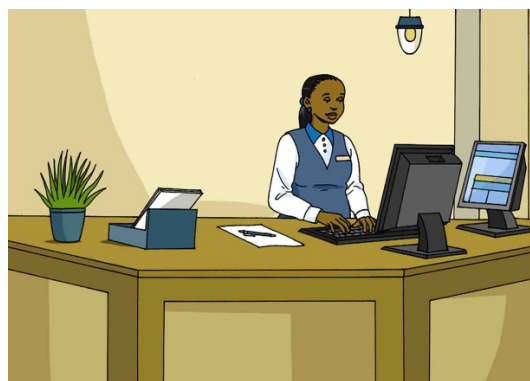


Figure 15: Recording tools and equipment<sup>5</sup>

- ✓ A combination of both most common.

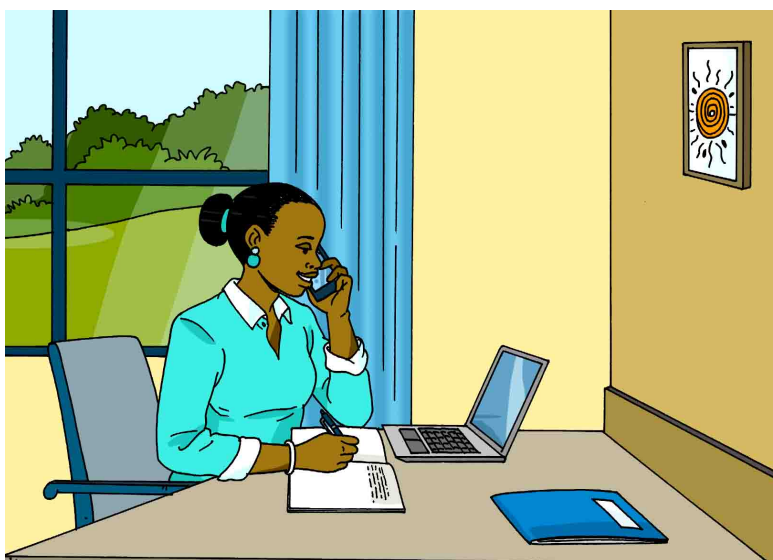


Figure 16: Recording tools and equipment<sup>6</sup>

<sup>5</sup> Cited, Alan Hickman (2015) Book and coordinate supplier services, ASEAN Website: [www.asean.org](http://www.asean.org).

<sup>6</sup> Cited, Alan Hickman (2015) Book and coordinate supplier services, ASEAN Website: [www.asean.org](http://www.asean.org).

- **Receiving payment for services**



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. It is important to collect payment from the client for the products and services identified in the quotation.

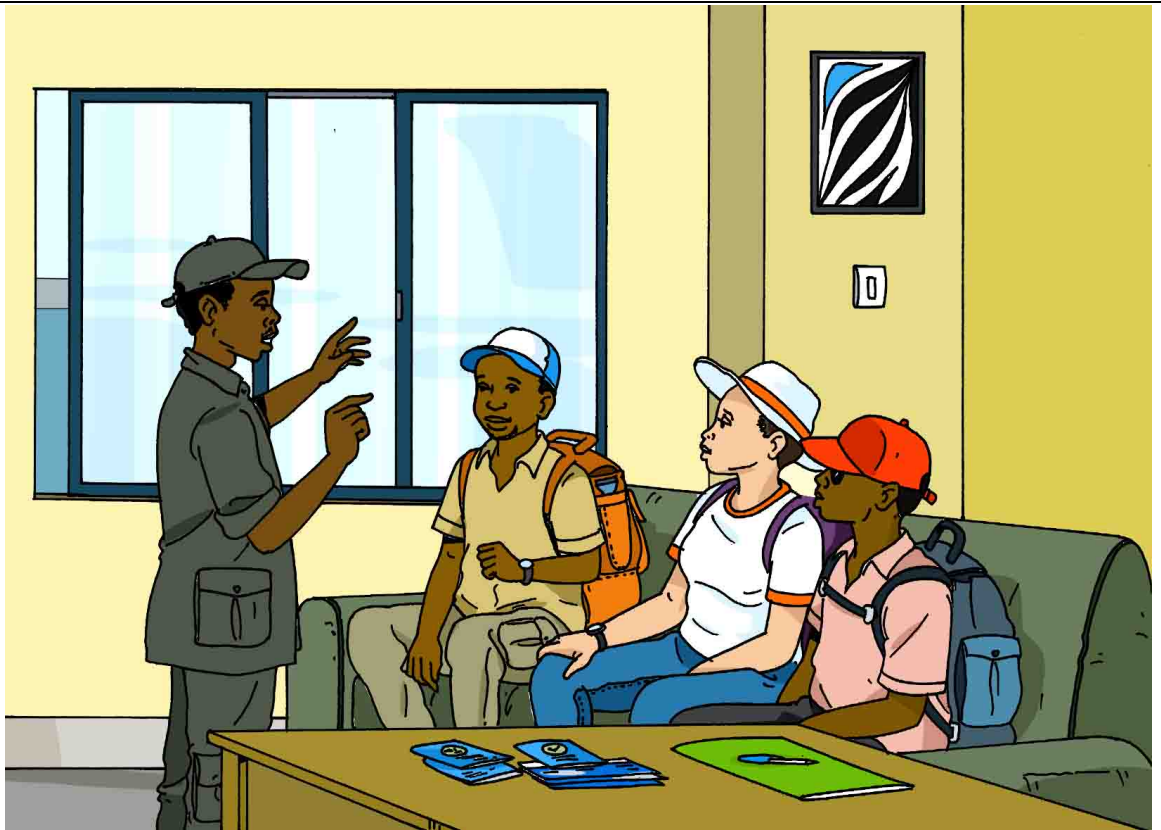
Figure 17: Payment for services<sup>7</sup>

**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
- **Handling clients' departure**
    - ✓ During departure, tour guide must ask all the group members to check all their belongings, passport, and currency and check out status from the hotel.

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<sup>7</sup> Cited, Alan Hickman (2015) Book and coordinate supplier services, ASEAN Website: [www.asean.org](http://www.asean.org).



*Figure 18 Handling clients' departure*

- ✓ He takes the whole group to the airport and helps them to get into the airport up to the last point open for accompanying persons.

#### **Travel by train**

- ✓ In case of train journey, tour guide has to wait outside the platform with placard. Group is directly taken to hotel from station by coaches.



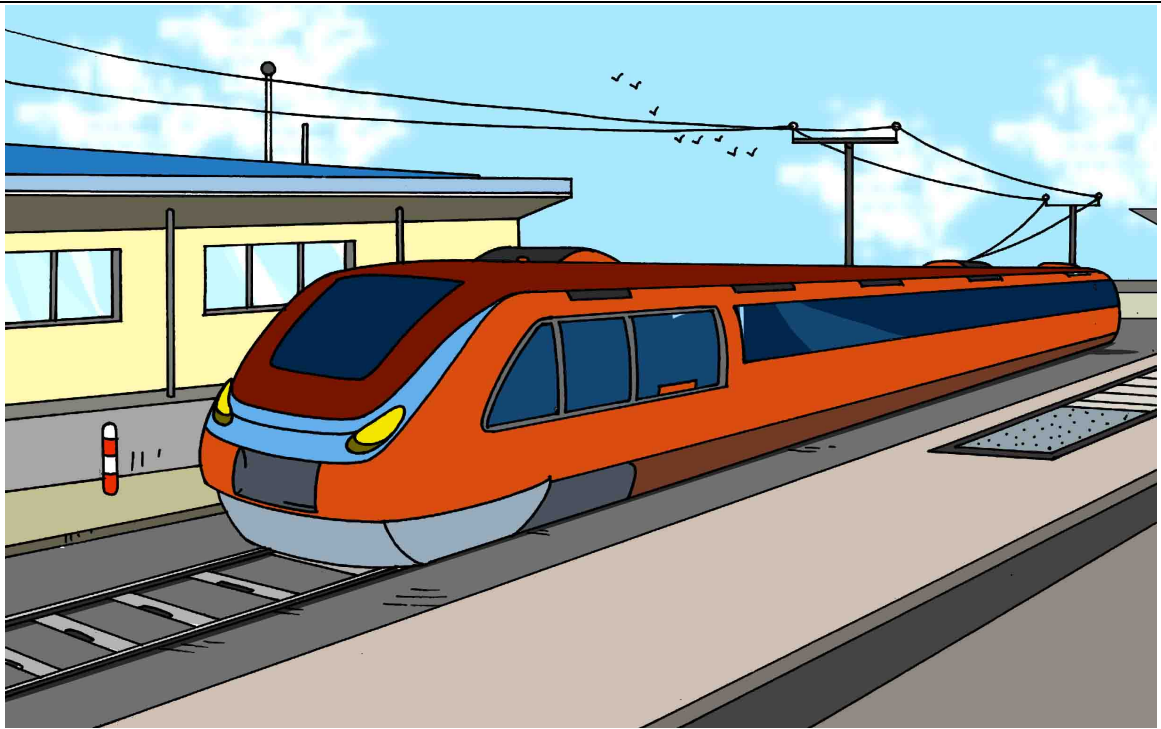


Figure 19 Travel by train

### Travel by coach

- ✓ Travelers coming by coach are contacted by the tour guides at some pre-decided point.
- ✓ He takes the group to hotel and helps them in check in. after the completion of tour, he
- ✓ completes all formalities like: feedback and wishes them the best of journey.



Figure 20 Travel by coach



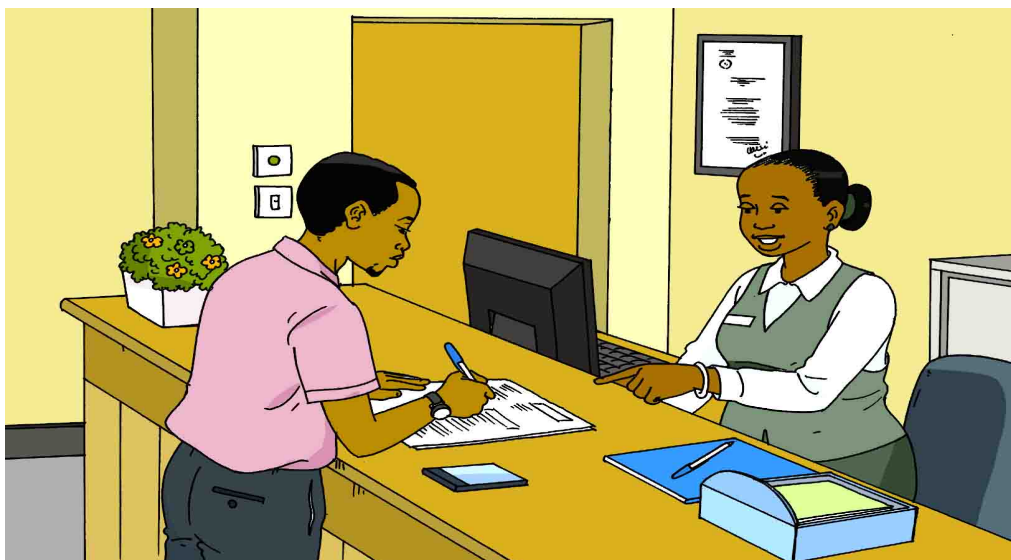
The skills and knowledge which may need to be demonstrated at this stage can include any or all of the following:

- ✓ Farewelling tour group members



*Figure 21: Farewelling tour group members*

- ✓ Capturing feedback
- ✓ Thanking all relevant people
- ✓ Completing end-of-tour activities by Completing required forms







*Figure 22: Completing end-of-tour activities forms*

- ✓ Handing in required items

### Participating in de-briefing

- ✓ Reconciling cash and vouchers
- ✓ Forwarding feedback received.

### Knowledge and presentations

-  Make sure that you have a good knowledge of the region you will visit history, culture, political scenario, social aspects.
-  Do not give information that you're not sure of as anyone (client/ escort/ hotelier/ airline official/ ground handling agent) may contradict you & this would be embarrassing. Also it may lead the clients to believe that your knowledge is not up to the mark.
-  Never give a prejudiced opinion of subjects like: religion, politics, social issues, like: women's role in the society etc.
-  Remain balanced and impartial. While we may employ very highly trained and professional guides, we cannot leave the content of the commentary wholly to their discretion.



## Activity 2: Guided Practice



### Task:

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,		
traveler's cheque		
Invoice/account		
Telephone payment		
E-mail or other electronic transmission		



### Activity 3: Application



#### Task:

Visit a local tour company where it has received client who are ready to depart and work on the following questions.

1. Identify four requirements (policies or procedures) you would have in place when checking-out procedures for departing clients.



### Formative Assessment

1. Identify the key points to brief on passengers once they have cleared the Customs check point?
2. The following are the tools used to identify the departing passengers except:
  - a) Booking form
  - b) Registration form
  - c) Itinerary document
  - d) Ticket document
  - e) Any payment documents
  - f) Newspaper
  - g) None of them
  - h) A and E
  - i) Only G**
  - j) All of them
3. List the client's feedback tools
4. What are different ways to follow while collecting the client's feedback, (tick all possible)
5. Describe the check-out procedures



## Points to Remember

- Be aware of the visitor's cycle
- Checking the arrival list to identify correctly the departing visitors
- Identify the payment methods



## Self-Reflection

*At the end of every unit trainee should:*

- 1) *Fill in the table above and share results with the trainer for further guidance.*

Areas of strength	Areas for improvement	Actions to be taken to improve
1.	1.	1.
2.	2.	2.

## UNIT 2: CLEAN AND MAINTAIN STORE INVENTORY



Figure 23: CLEAN AND MAINTAIN STORE INVENTORY<sup>8</sup>

## Unity summary:

This unit describes functions of cleaning and maintaining store inventory for the tourism and hospitality industries and applies to the full range of industry sectors and environments. This unit provides skills, knowledge and attitudes about ways to maintain the inventory of outdoors and equipment, strategies to handle damages, and the procedures to clean the store, tools and equipment.

<sup>8</sup> <https://depositphotos.com/152164866/stock-illustration-colored-camping-and-hiking-elements.html>

## Self-Assessment: Unit 2

1. Look at the illustration. What is happening? What do you think this learning outcome will be about?
2. Fill in the self-assessment below.

There are no right or wrong ways to answer this survey. It is for your own use during this course. Think about yourself: do you think you can do this? How well? Read the statements across the top. Put a check in column that best represents your situation. At the end of this learning outcome, we'll take this survey again.

<b>My experience</b>	<b>I don't have any experience doing this.</b>	<b>I know a little about this.</b>	<b>I have some experience doing this.</b>	<b>I have a lot of experience with this.</b>	<b>I am confident in my ability to do this.</b>
<i>Knowledge, skills and attitudes</i>					
<i>Identify the outdoor tools and equipment</i>					
<i>Select tools and equipment in their clusters</i>					
<i>Describe lost and found items</i>					
<i>Describe damaged equipment for repair</i>					
<i>Assemble repaired equipment and items</i>					
<i>Identify the cleaning tools and equipment</i>					
<i>Apply storing tools and equipment</i>					

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
<i>Describe ways of cleaning tools and equipment</i>					

### Key Competencies:

Knowledge	Skills	Attitude
1. Identify the outdoor tools and equipment	1. Select tools and equipment in their clusters	1. Responsive
2. Describe damaged equipment for repair	2. Assemble repaired equipment and items	2. Attentive
3. Identify the cleaning tools and equipment	3. Apply storing tools and equipment	3. Open-minded

### Discovery activity

- How can you identify the stock expected to be delivered into a venue on a particular day?
- What activities might you undertake to prepare an area ready to receive returning tools and equipment?
- Describe the checks that should be made when checking a returning tools and equipment.
- List five types of properties that may a Lost and Found facility
- Name four pieces of information that must be entered in the Lost and Found Register when recording a „lost" item?
- Identify activities to handle damaged tools and equipment



## Topic 1.1: Maintaining the inventory of outdoor tools and equipment



### Activity 1: Problem Solving



#### Task

A group of tourists has decided to visit Rwanda, specifically Kivu Beach. They have booked a tour with your company, Kivu Beach Tours, where they expect to receive all the necessary tools and equipment that will facilitate their outdoor activities and entertainment.

1. Identify different outdoor activities that they may enjoy while visiting Kivu beach
2. List five tools and equipment may be used while enjoying Kivu beach

#### **Key Facts: Maintaining the inventory of outdoor tools and equipment**

The first step in receiving and storing stock is to identify the stock expected to be delivered to the business for the day/shift so you can prepare for these deliveries and you know what to expect.

#### **Inventory**

This refers to a detailed list of all the goods and property owned by a person or a business.



#### **Outdoor Recreation tools and equipment**

- ✓ Outdoor Recreation Accessories
- ✓ Camping & Hiking Equipment
- ✓ Climbing Equipment
- ✓ Cycling Equipment





Figure 24: Outdoor Recreation tools and equipment<sup>9</sup>

- ✓ Hiking Clothing
- ✓ Paintball Equipment
- ✓ Water Sports
- ✓ Winter Sports Equipment

#### Their categories

- ✓ Sports Apparel & Equipment
- ✓ Outdoor Games & Activities
- ✓ Water Sports
- ✓ Sports & Outdoor Play Toys

<sup>9</sup> <https://www.dreamstime.com/vintage-outdoor-recreation-seamless-pattern-colorful-trees-animals-motorhome-camping-tools-equipment-vector-illustration-image222175724>



Figure 25 *categories of Outdoor Recreation tools and equipment*<sup>10</sup>

- ✓ Play Sets & Playground Equipment
- ✓ Exercise & Fitness Equipment
- ✓ Outdoor Recreation
- ✓ Clothing, Shoes & Jewelry
- **Arranging tools and equipment in their clusters**

The following are the criteria to consider while arranging tools and equipment

- ✓ Status
- ✓ Functionality
- ✓ Size
- ✓ Weight
- ✓ Use
- ✓ Quality
- ✓ Thickness
- ✓ Packaging

### **Preparing the area**

Preparing the delivery/receival area prior to receiving stock may require you to: Follow the Standard Operating Procedure (SOP) for cleaning the area, which may include:

- ✓ Sweeping
- ✓ Mopping
- ✓ Pressure washing the area.

- **Taking stock of the tools and equipment**

Never accept a delivery without doing a visual inspection unless you have signed for it.

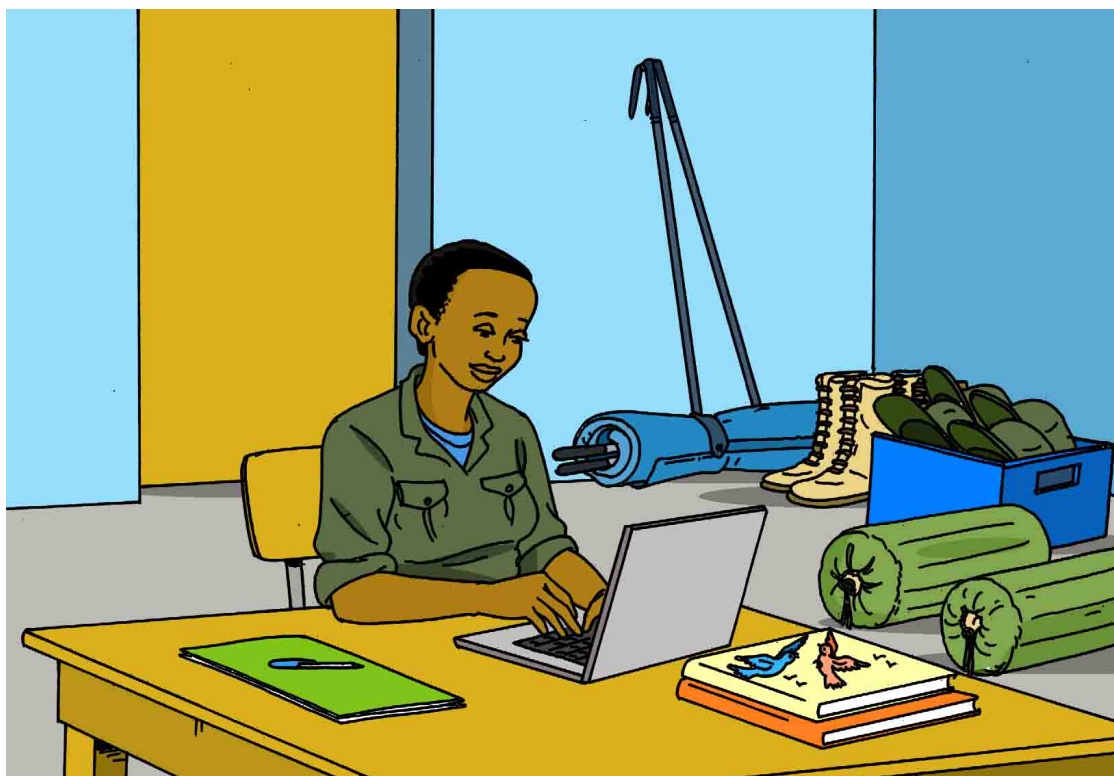


Figure 26 tools and equipment inspection

The stock delivered into the property should be checked against the delivery documentation for:

- ✓ Purposes of the activity
- ✓ Number of demands (tourists)
- ✓ **Damage.** Make sure there are no leaking containers, no broken things, labels are not missing and seals are intact
- ✓ **Number of items.**
- ✓ **Quality.** Make sure all thing is fit for human use, to ensure items are of the correct grade or year or style.
- ✓ **Type and brand** – to ensure items delivered match items listed on the paperwork, and to verify the items meet the needs/requirements of the business
- ✓ **Quantity** – checking to make sure all the items listed on delivery documentation has been supplied

<sup>10</sup> <https://www.dreamstime.com/fitness-equipment-sport-balls-racket-recreation-gym-tools-exercises-vector-illustrations-basketball-football-ball-glove-image195685656>

- ✓ **Use-by dates** – to ensure the items are not out of date, to verify items have not exceeded „best before" dates, and to ensure items have sufficient shelf-life left
- ✓ **Discrepancies.** These are differences between what was offered and what was returned, and differences between what was returned and what was listed on the accompanying documentation
- **Following up on lost items**
  - ✓ Common venues passenger's items may be lost:
    - ✚ Hotels
    - ✚ Motels
    - ✚ Commercial catering facilities
    - ✚ Convention centres
    - ✚ Casinos
    - ✚ Clubs
    - ✚ Restaurants
    - ✚ Resorts
    - ✚ Theme and amusement parks
    - ✚ Tourist attractions
    - ✚ Back-packer accommodation
    - ✚ Bed and Breakfast establishments
    - ✚ Dormitories
    - ✚ Villas.

### ***Classifications of lost and lost items***

Properties often classify found items into one of three categories:

- ✓ **Valuable items**
  - ✚ Cash over a certain amount – as nominated by the venue
  - ✚ Laptop computers – and accessories
  - ✚ Cameras
  - ✚ Watches
  - ✚ Jewelry
  - ✚ Cell phones
  - ✚ Car or house keys

- + Handbags and wallets
- + Business documentation – reports, notes, business papers, plans
- + Personal items – credit cards, driver's license
- + Travel documentation – passports, visas, tickets

✓ **Non-valuable items**

- + Magazines
- + Make-up/cosmetics
- + Old/damaged clothing
- + Stationer

✓ **Perishables items**

- + Food
- + Drinks
- + Partly consumed items and unopened items.

**Activities for following up on lost items**

- ✓ Name properties that may have a lost and found facility
- ✓ Identify appropriate location for lost and found facility
- ✓ Develop in-house lost and found policies and procedures
- ✓ Identify the legal requirements that apply to lost and found items
- ✓ Establish lost and found register Check items for safety and legality and take appropriate action
- ✓ Record found items in lost and found register
- ✓ Record items reported lost in lost and found register
- ✓ Tag the found item
- ✓ Store the found item appropriately
- ✓ Notify internal establishment staff to facilitate return of found item to owner
- ✓ Assist claimants who contact the establishment from another country, or distant area, to claim lost items

**Sample Lost and Found Register**

**The 'lost' items section of the Register**

The Lost and Found Register may have the following pages at the rear of the Register usually in Landscape format.

Date/Time Lost	Location Lost	Description & Value	Name of Contact	Action Taken	Returned – Date & Details of Proof of Ownership	Signature of Claimant

Many variations on the above example are present within the industry at different properties

### The 'found' items section of the Register

The Lost and Found Register may have the following pages at the front of the book usually in Landscape format.








Item No.	Date/Time Found	Location Found	Description & Value	Name of Finder	Tag or Receipt No.	Action Taken	Disposal or Return	Sign. In	Sign. Out

### Obtaining contact details for Following up on lost items

It is important to capture contact details of the person making the report, or the contact details of the owner of the item, as appropriate to the individual situation – as mentioned, not all people reporting the loss are the owners of the missing item.

Contact details may need to be quite extensive especially if the person has left the Property /area.

Details may include:

-  Cell phone number
-  Work telephone number
-  Home telephone number
-  Email address
-  Fax number
-  Street address of home/business
-  Post office box address.



## Activity 2: Guided Practice



### Task:

Recall the scenario below, as seen in "Activity 1," where a group of tourists has decided to visit Rwanda, specifically Kivu Beach. They have booked a tour with your company, Kivu Beach Tours, where they expect to receive all the necessary tools and equipment that will facilitate their outdoor activities and entertainment.

1. List ten tools and equipment may be used while enjoying Kivu beach
2. Identify the criteria to consider while arranging these tools and equipment as listed in the above question



### Activity 3: Application



#### Task:

Complete and submit a sample page from the Lost and Found Register at the venue where you work (or another nominated venue) recording an item reported as lost by a guest/patron.

- a) The report may be a real-life report or a simulated report.
- b) The submitted page must:
- c) Be professionally completed
- d) Contain comprehensive and clear details of the lost item
- e) Identify date, time and location, as appropriate
- f) Show the name of the person who lost the item together with their contact details.



## Topic 2.2 Handling damages



### Activity 1: Problem Solving



#### Task

A group of tourists has booked a tour with your company for two days in Rwanda, with the main focus being on experiencing adventure activities, particularly hiking volcanoes. As they embark on their journey, the tourists carry backpacks containing both reported and unreported items. Unfortunately, due to the adverse weather conditions, including slipping and falling while climbing the mountain, many of their unreported items were damaged.

1. What are different activities that may be done to identify damaged equipment for repair?
2. What may you do for these unreported items that have been found damaged?

#### Key Facts: Handling damages

- **Identifying damaged equipment for repair**

Regardless of what method/facilities are used to store items the prime requirements are:

- ✓ They can be recovered accurately and quickly when a query or claim is made
- ✓ They are stored safely to protect them from damage and theft
- ✓ There is limited access to the area or items from staff and customers/guests.

People who have damaged items will commonly contact the venue to determine if the item may be repaired:



In person – walking into the venue to make an enquiry

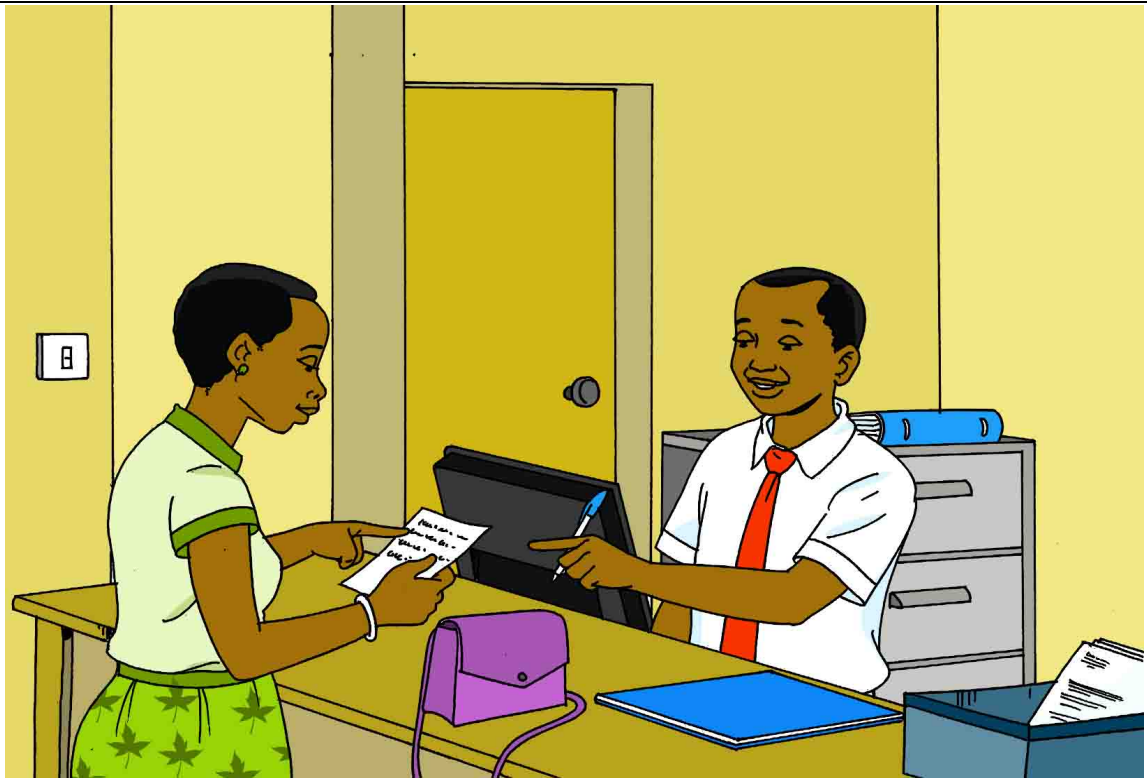


Figure 27: In person communication

- ✚ By telephone – calling the venue to see if their item has been handed in.
- ✚ Via email writing to ask if a nominated item has been may be repaired.
- ✚ These notes detail the established procedures for dealing with a person who arrives in person seeking claim an item damaged at your property.

#### • Carrying out the repair

Three important things to remember when communicating with people who have damaged equipment for repair and are reporting their damage are:

- ✓ Show sensitivity
- ✓ Demonstrate interest and involvement
- ✓ Prove you are doing something to try to locate the item.



Figure 28 sensitivity to someone who lost item<sup>11</sup>

## **Activities to assist claimant identify repaired items or property**

### **Use appropriate interpersonal skills:**

- ✓ This means delivering repairing equipment services with the same care, courtesy and professionalism as all other services delivered by the venue.

### **Identify lost item:**

- ✓ This is the first step when determining whether or not the person you are dealing with has a legitimate claim on the item they are seeking to be repaired – you need to ask the person to answer some basic questions to identify the item they are seeking to claim.

### **Identify item in the Register**

- ✓ When the person has provided a description of the item, you should next attempt to locate the item in the guest register.

### **Identifying and returning a reported Lost item**

- ✓ Where the claimant is seeking to claim an item that was reported as damaged you should turn to the damaged section of the guest register to identify if a report was made about the item.

### **Identifying and returning a repaired item**

- ✓ Where the claimant is seeking to claim an item that was not reported you should turn to the repaired items section of the guest register and look for an item matching the details provided by the person.

- **Collecting repaired equipment and items**

It is always necessary to capture the name of the person who has lost the item being reported as repaired equipment and items.

- ✓ Full name is required, but other details (such as date of birth) are not.
- ✓ In a significant number of cases the person reporting the repaired equipment and items is not the owner – for example the person making the report may be a family member, or a friend – especially where the guest has departed overseas /internationally.

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<sup>11</sup> Alan Hickman (2015) Provide a Lost and Found Facility, ASEAN Website: [www.asean.org](http://www.asean.org).

- ✓ You must never return/release a „ repaired equipment and items” to anyone other than the owner unless there is documentation from the owner authorizing return/release to a third party.
- ✓ If in doubt, talk to your Supervisor.



## Activity 2: Guided Practice



### Task:

There was an unfortunate incident where mice damaged various reported items, including bags, as well as other non-reported belongings of the passengers. As a result, the affected guests expressed their dissatisfaction, stating that they were not adequately informed about the possibility of such incidents occurring.

- Identify three important things to do when communicating with people who have damaged items for repair.
- What should you do for non-reported items which have been damaged in the organization where you are working



## Activity 3: Application



### Task:

A tourist who is currently staying at your establishment has lost their unreported camera, which has now been handed over to you. The camera was discovered by a tour guide in the attraction area, and unfortunately, it appears to have been damaged by animals and may require repair. It seems that the tourist is not yet aware that they have lost their camera.

1. Apply different activities to cool down the tourist who has lost their unreported camera
2. Process different ways to return the damaged camera to the angry tourists

## Topic 2.3: Cleaning the store, tools and equipment



### Activity 1: Problem Solving



#### Task

To make a safari tour, it is necessary to carry different tools and equipment in order to facilitate tour experience. If the used tools and equipment became dirty may need to be cleaned before restocked.

1. Identify the tools and equipment that may be used during a safari tour.
2. What other materials may be used to clean these equipment?

#### Key Facts: Cleaning the store, tools and equipment

For most activities performed by a tour operator, there are clear and precise instructions on how to perform the tasks.



Figure 29: Cleaning the store, tools and equipment

#### Cleaning.

It is an activity of making an area or something free of dirt, marks, or mess, especially by washing, wiping, or brushing.

➤ **Methods of cleaning equipment:**

The methods used to clean equipment can vary basing on the equipment category as follows:

- ✚ **Mechanical cleaning:** It is often referred to as clean in place (CIP) and it requires no disassembly or partial disassembly.
- ✚ **Clean-out-of-place (COP):** It is applied to equipment, which can be partially disassembled and cleaned in specialized COP pressure tanks.
- ✚ **Manual cleaning:** It is applied to equipment that requires total disassembly for cleaning and inspection.

• **Identification of Cleaning materials**



Cleaning material means a solvent used to remove contaminants and other materials, such as dirt, grease, oil, and dried or wet coating, from a substrate before or after coating application or from equipment associated with a coating operation, such as spray booths, spray guns, racks, tanks, and hangers.

Protective gloves A good supply of disposable gloves.

Figure 30: Cleaning materials-gloves<sup>12</sup>

These should be fully operational, not leaking, easy to operate, and not smelly.



Figure 31: Buckets<sup>13</sup>

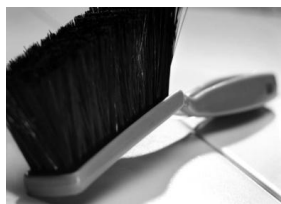


Figure 32: Brush<sup>14</sup>

Cleaning tools and equipment “**Brooms and brushes**”



<sup>12</sup> Alan Hickman (2015) Clean and prepare rooms for incoming guests, ASEAN Website: [www.asean.org](http://www.asean.org).

<sup>13</sup> Alan Hickman (2015) Clean and prepare rooms for incoming guests, ASEAN Website: [www.asean.org](http://www.asean.org).

<sup>14</sup> Alan Hickman (2015) Clean and prepare rooms for incoming guests, ASEAN Website: [www.asean.org](http://www.asean.org).

### Cleaning agents and chemicals

Cleaning agents and other chemicals are used to perform various tasks and clean various tools and equipment.

Depending on what tool and equipment, you may be required to have:

- ✓ Polishes
- ✓ Detergents
- ✓ Glass cleaner
- ✓ Multi-purpose cleaners
- ✓ Leather cleaners
- ✓ Porcelain and ceramic cleaners
- ✓ Sanitizers
- ✓ Disinfectants
- ✓ Deodorizers and air sprays
- ✓ Pest control sprays and similar.



Figure 33: Cleaning agents and chemicals

Specific activity requirements in relation to individual Occupational Health and Safety (OHS) issues may require other, more substantial protective clothing (including gloves) be worn.

- **Cleaning the store**

- ✓ **Dusting:** Dusting: it is an action of cleaning by using dusters
- ✓ **Wet cleaning:** it is an action of cleaning by using water with detergents and other additives
- ✓ **Scrubbing** it is an action of cleaning by using scrubbing machine

- ✓ **Hooving:** It is an action of cleaning by using hoover machine
- ✓ **Moping:** It is an action of cleaning by using mop
- ✓ **Principles of cleaning tools:**
- ✓ **Dry clean**
- ✓ **Pre-rinse**
- ✓ **Wash (soap and scrub)**
- ✓ **Sanitize**

#### **Clean floors of the store**

- ✓ Remove everything that may be on the bathroom floor such as mats, trash cans, and small pieces of furniture
- ✓ Sweep the floor to remove dirt, hair, dust, and other debris
- ✓ Dissolve detergent into warm water using the manufacturer's instructions for the correct water to detergent ratio
- ✓ Pour the solution over the entire floor so that the solution can fill into the grout lines
- ✓ Allow the solution to remain on the floor for 15 to 20 minutes
- ✓ Scrub the grout with a small medium-bristled brush



*Figure 34 Clean floors of the store*

- ✓ Rinse the floor with a mop dampened with clean water
- ✓ Mix a second batch of detergent and water
- ✓ Mop the entire floor with the fresh solution

- ✓ Rinse the mop with clean water and mop a second time over the floor to rinse it
- ✓ Use a squeegee to push residual moisture to one area of the floor before absorbing it with dry towels.

- **Cleaning tools and equipment**

Generally, a wipe over assisted by a general-purpose cleaner should suffice, with extra spot-cleaning as required.










The intention is to remove any marks that the tools and equipment may have and to maintain its attractive appearance. You may need to replace used or dirty linen and rubbish bags that are provided at end of the trolley to maintain eye appeal.

Attention should also be paid to:

- ✓ Removing any soiled items
- ✓ Removing any empty packages.

### **Cleaning the store**

Steps to follow:



-  Move the items
-  Clean the shelves and closets
-  Replace the air filter
-  Clean the floor
-  Clean with bleach
-  Keep the storeroom safe from moisture and dust
-  Return the items in their clusters


- **Storing the tools and equipment**

- ✓ The tools and equipment need to restock when not used or after use at the end-of-shift or activity.
- ✓ It is important that you restock your tools and equipment so that it is ready for the next shift.
- ✓ Each organization will have different items that need to be placed on the tools and equipment

### **Location for storing equipment**

In general:

- ✓ Large items
- ✓ Smaller items
- ✓ Everything has its nominated position in the storeroom to:
  -  Make it easy to see what is left and how much is left
  -  Allow all room attendants to quickly obtain what they want remember that others will also be using this store

 Facilitate stocktaking activities.

### Checks to make when storing equipment

When storing equipment, check the following:

- ✓ All minor or major faults and repair needs have been identified and acted upon
- ✓ All equipment has been cleaned – and where appropriate, dried
- ✓ Electrical cords are rolled up and positioned safely and securely
- ✓ Every piece of equipment and every cleaning item is stored safely (that is, so as not to pose a risk to staff) and in the appropriate location
- ✓ The door to the storeroom is locked when you leave.



### Activity 2: Guided Practice



#### Task:

At the end of the tour, a group of tourists who were exploring the city of Musanze by bicycle encountered rainy weather and returned back to the starting point with their bicycles covered in dirt.

1. Identify what materials, tools and equipment to be cleaned
2. what are the method to be used while cleaning the used tools and equipment to be cleaned?



### Activity 3: Application



#### Task:

Visit a local company that has hosted visitors for outdoor recreational activities and assist the operator in receiving and organizing the tools and equipment before storing them.

1. Identify cleaning materials for those used tools and equipment
2. Cleaning the store in order to arrange those used tools and equipment
3. Cleaning those used tools and equipment
4. Storing those cleaned tools and equipment



### Formative Assessment

- 1) Observe well the list below and write the D (detergent), T (tool or equipment) to describe the cleaning facilities below:
  - ✓ Polishes
  - ✓ Protective gloves
  - ✓ Brooms and brushes
  - ✓ Glass cleaner
  - ✓ Multi-purpose cleaners
  - ✓ Leather cleaners
  - ✓ Porcelain and ceramic cleaners
  - ✓ Sanitizers
- 2) Describe the checks that should be made when checking a stock
- 3) List four activities involved in preparing the delivery/receive area prior to receiving Stock
- 4) Showing sensitivity is the best thing to remember when communicating with people who have damaged equipment for repair
  - A. T=True or
  - B. F=False
- 5) Identify and describe different methods of cleaning equipment



## Points to Remember

- The first step in receiving and storing stock is to identify the stock expected to be delivered to the business for the day/shift so you can prepare for these deliveries and you know what to expect.
- Everything must be delivered after checking their cleanliness/ hygiene
- Every tool and equipment must be collected back after use and check its status before restoring



## Self-Reflection

Areas of strength	Areas for improvement	Actions to be taken to improve
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

## UNIT 3: MAINTAIN DOCUMENTATION

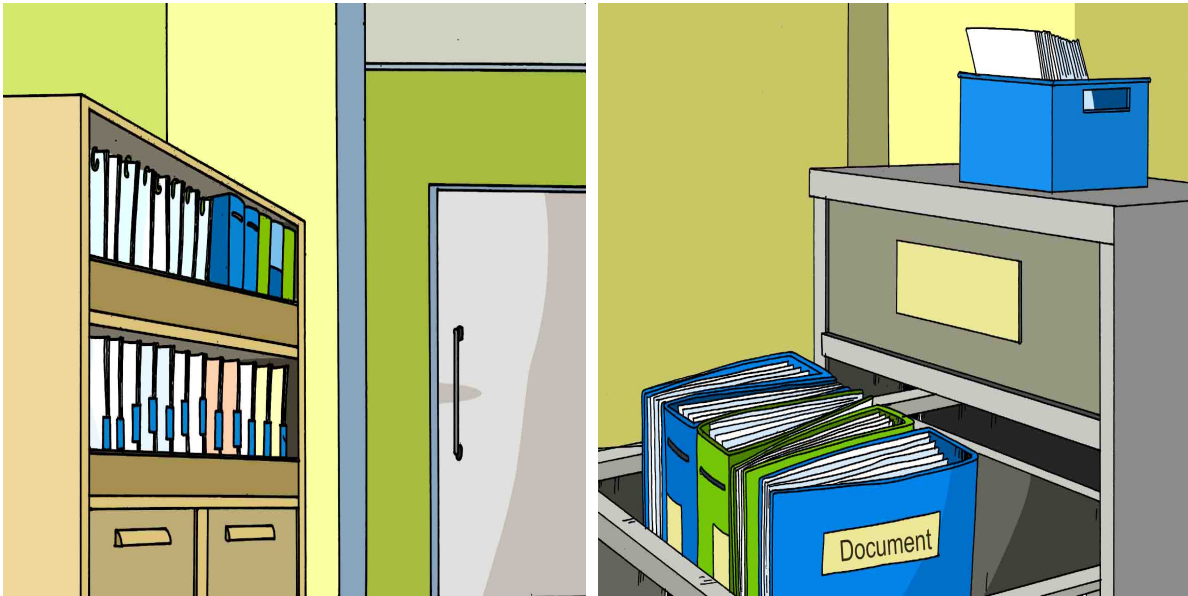


Figure 35: Maintain documentation

### Unity summary:

This section identifies the processes that are involved with documentation, and the types of documentation that may be found in hospitality office environments. This unit provides skills, knowledge and attitudes about ways to apply the procedures for receiving and processing invoices, licenses and permits, and how to restock outdoor tools and equipment.

## Self-Assessment: Unit 1

1. Look at the illustration. What is happening? What do you think this learning outcome will be about?
2. Fill in the self-assessment below.

There are no right or wrong ways to answer this survey. It is for your own use during this course. Think about yourself: do you think you can do this? How well? Read the statements across the top. Put a check in column that best represents your situation. At the end of this learning outcome, we'll take this survey again.

<b>My experience</b>	<b>I don't have any experience doing this.</b>	<b>I know a little about this.</b>	<b>I have some experience doing this.</b>	<b>I have a lot of experience with this.</b>	<b>I am confident in my ability to do this.</b>
<b>Knowledge, skills and attitudes</b>					
<i>Identify the outdoor tools and equipment</i>					
<i>Select the outdoor tools and equipment</i>					
<i>Identify the damaged outdoor tools and equipment</i>					
<i>Determine the techniques of identifying damaged equipment for repair</i>					
<i>Assembling repaired equipment and items</i>					
<i>Identify cleaning materials</i>					
<i>Describe the ways of cleaning the store</i>					

My experience	I don't have any experience doing this.	I know a little about this.	I have some experience doing this.	I have a lot of experience with this.	I am confident in my ability to do this.
Knowledge, skills and attitudes					
Select cleaning tools and equipment					

### Key Competencies:

Knowledge	Skills	Attitudes
1. Identify the outdoor tools and equipment	1. Select the outdoor tools and equipment	1. Determined
2. Identify the damaged outdoor tools and equipment	2. Assembling repaired equipment and items	2. Detail-oriented
3. Identify cleaning materials	3. Use cleaning tools and equipment	3. Proactive

### Discovery activity



#### Task:

1. What items of equipment do you use to process travel documents in your workplace?
2. What are the factors to consider while filling guest document?
3. What are the ways used to deliver payment document to customers?
4. List different information needed to prepare and make an invoice

## Topic 3.1: Applying the procedures for receiving and processing invoices



### Activity 1: Problem Solving



#### Task

A tourist has made a booking with the company you work for. After utilizing the company's resources, they require a payment document to be provided for submission to the relevant parties.

1. What document do you think need to be prepared for the tourist?
2. What are the information needed to record while preparing the document?

#### Key Facts (The procedures for receiving and processing invoices)

Working in the group travel industry, one has the duty to answer every question consumer have. As so, one learns soon enough that it takes a combination of official information and experienced-travelers' ideas to avoid the most common pitfalls of travel. Among these, securing travel documents effectively is a major concern.

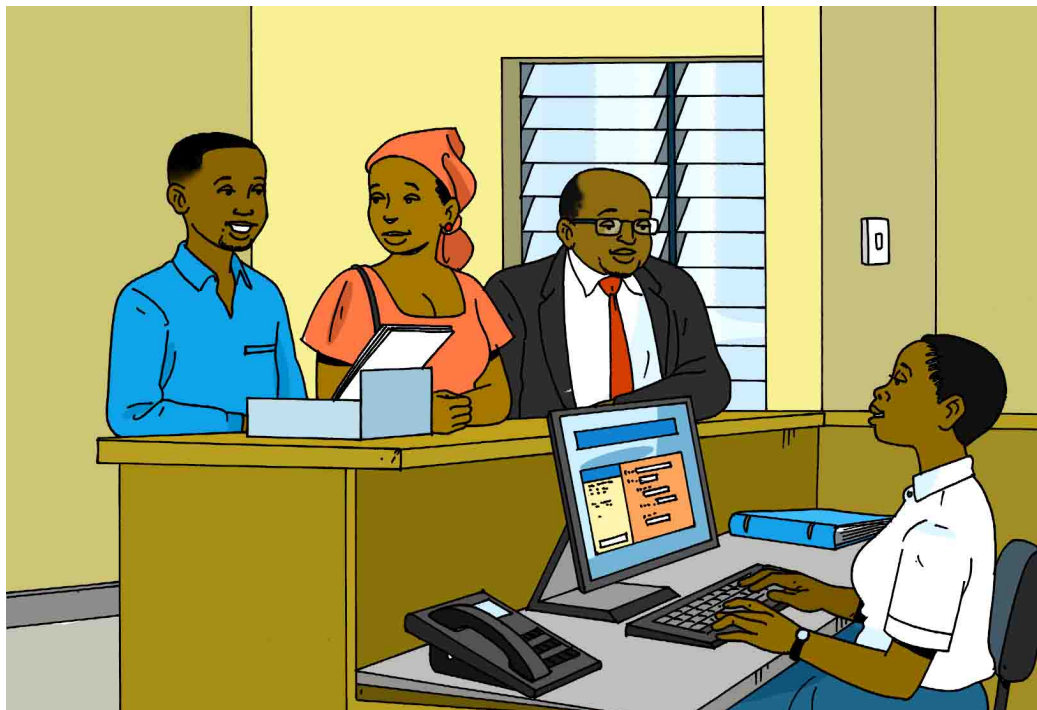


Figure 36 The procedures for receiving and processing invoices



## Types of travel documents

**The passport:** often comes in the form of a booklet that serves as proof of nationality for the bearer. The passport is also the travel document that grants visa-free access to certain countries.

**Laissez-passers:** are special travel documents issued by governments and certain international organizations. These are issued often in special circumstances, such as for a stateless person, as emergency passport, or to grant access for humanitarian reasons. A laissez-passer does not have to state any mention of nationality other than that of the issuing authorities and they grant only restricted access and right of travel to the holder.

The **National Identification card** could allow “international” travel. It is the case for citizens of the member-countries of the European Union or the Economic Community of West African States.

- **Applying the procedures for receiving and processing invoices**
  - ✓ **Preparing for invoicing**

Quotations are document stating all requested information relating to a travel product and service including inclusions, costs and considerations.

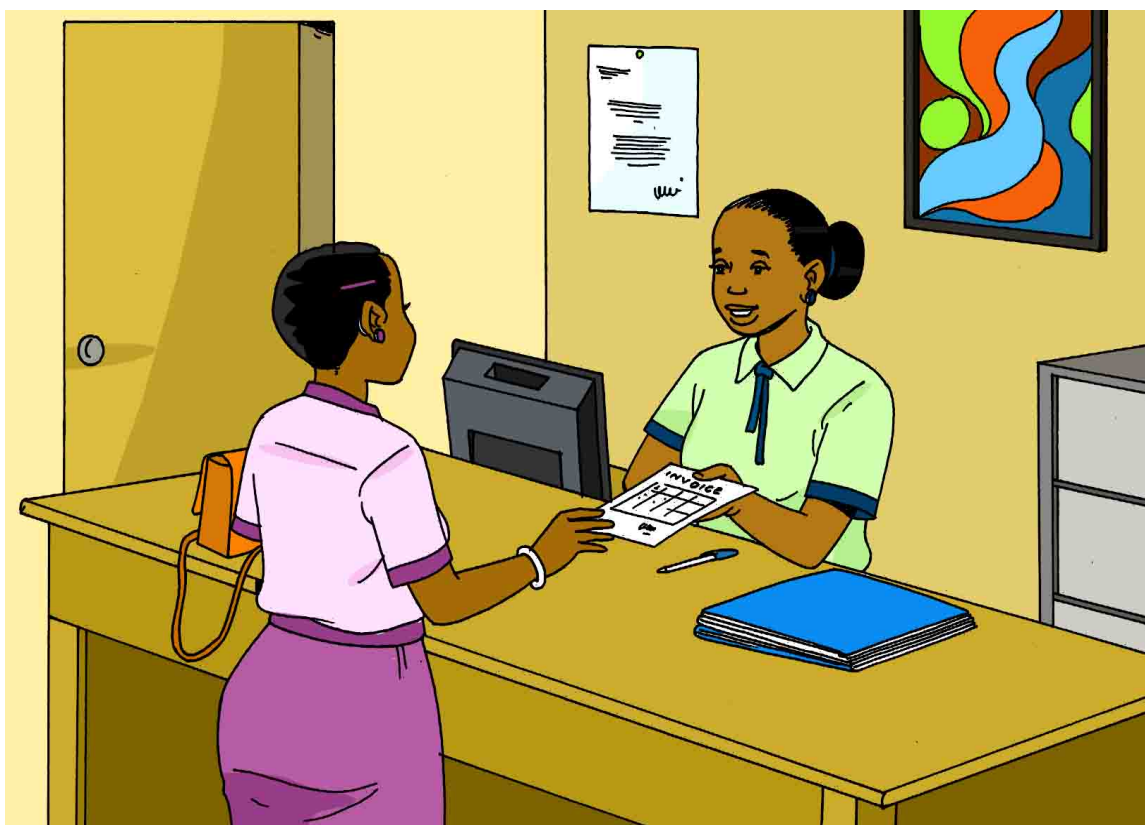


Figure 37: Preparing for invoice

### **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

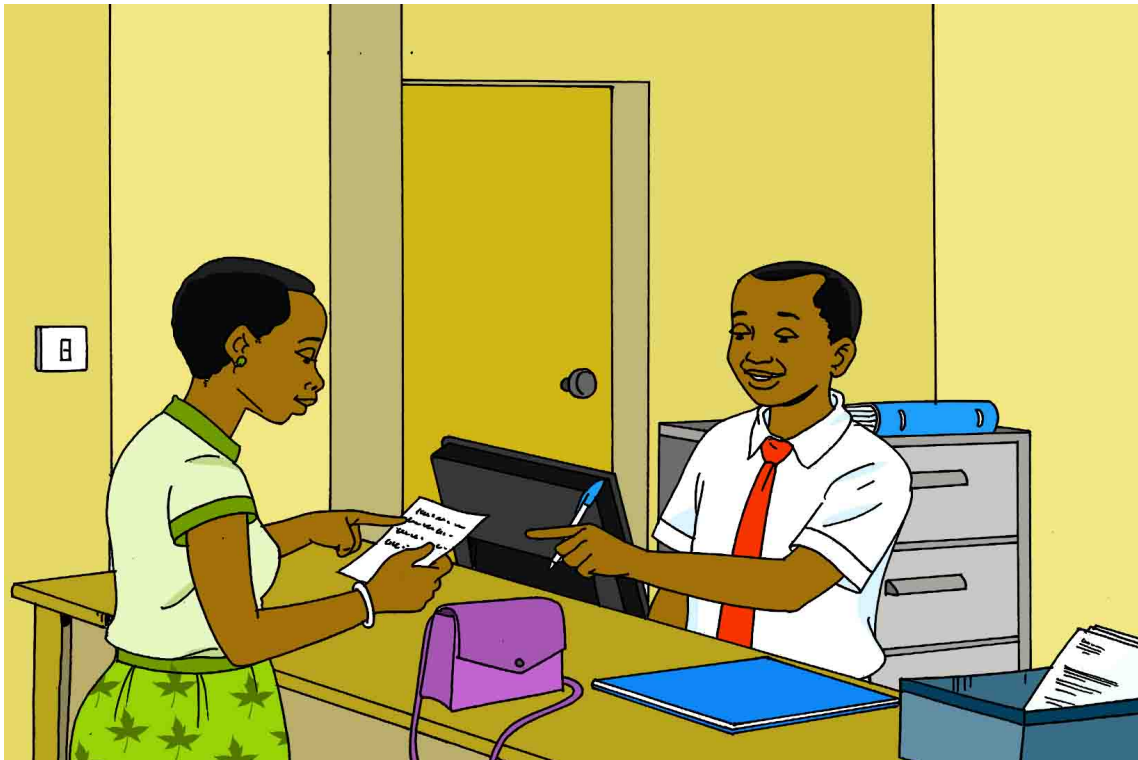


Figure 38: General quotation inclusions

- ✚ 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 Rwandan francs
- ✚ 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 be contacting them to follow-up.

**There are two primary ways in which a travel organization 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.**

Also, you will find that many travel bloggers and companies online refer to travel credit cards, travel insurances, and bookings as travel documents.



*Figure 39: Customer's details record*

While these are the most common travel documents, travel is extremely difficult without a visa or, often, vaccination records.

### **Process of collecting customer information and travel needs**

Before we look at possible methods of recording information for quotations, it is important to briefly understand the process involved in collecting information and preparing quotations for customers. Here is an example of a typical process:

- ✚ Initial customer contact – notes taken using a pro-forma quotation planner or enquiry sheet

- ✚ Quotation reference number allocated using internal office protocol – Manual or Electronic
- ✚ Follow-up quotation work with suppliers – notes added to pro-forma quotation planner, enquiry sheet – Manual or Electronic
- ✚ Copies of correspondence from suppliers –Printed and placed in file or saved electronically
- ✚ Copies of correspondence to customer –Printed and placed in file or saved electronically
- ✚ Calendar book or diaries for follow-up – with suppliers or customer

#### ✓ **Carrying out the invoicing process**

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:

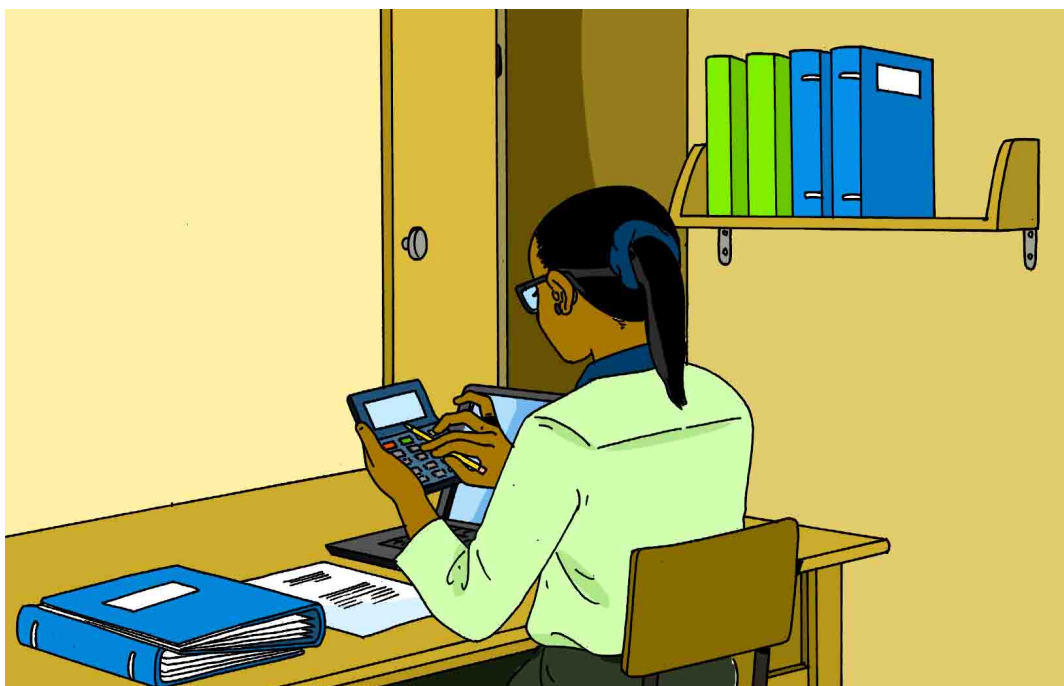
- ✚ Date of quotation and reference number (if applicable)
- ✚ Clients name
- ✚ Phone contacts and fax (if applicable)
- ✚ Email address
- ✚ Address
- ✚ Month of travel
- ✚ Length of travel and class of travel
- ✚ Flight details – at least two airlines including routing, stopovers, prices and taxes, special offers
- ✚ Tours
- ✚ Accommodation
- ✚ Transfers
- ✚ Inclusions and exclusions
- ✚ Insurance details
- ✚ Payment requirements and cancellation fees
- ✚ Conditions of the quote
- ✚ Deposits required

- ✚ Service fees
- ✚ Expiry date of the quotation
- ✚ General conditions and rules.

### **Activities associated with calculating costs of products and services on invoice**

Whilst some of these activities will be explored in more detail throughout this section, 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



*Figure 40: Activities associated with calculating costs*

- ✚ 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.

### ***General considerations when securing quotes 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



Figure 41: Securing quotes and costs<sup>15</sup>

- ✚ Listen and accurately record what you are told
- ✚ Get the name of the person you are dealing with
- ✚ Secure and record the quote reference number
- ✚ Request an email copy of the quote.

### **Submit draft quotation**

Once the draft quotation has been prepared along with any secondary quotations, providing viable options to the customer, it is now time to submit the quotation for approval or amendment before the final quotation can be prepared and sent to customers.

**Activities associated with submitting draft quotation may include:**

- ✚ Provision of draft quotation to supervisor, manager or designated internal departments
- ✚ Verifying inclusions, exclusions and calculations included in the quotation
- ✚ Checking accuracy and comprehensiveness of the quotation
- ✚ Ensuring the quotation conforms with internal formatting and presentation requirements



Figure 42: checking legitimacy of the quotation

- ✚ Checking the legitimacy of the quotation.
- ✚ Depending on the review of the draft proposal the following actions may take place
- ✚ Amend the quotation – where changes are required
- ✚ Record and file the approved quotation.

### **Considerations when providing quotation information**

When you provide information to customers it is absolutely essential that it is:

- ✚ Up-to-date
- ✚ Accurate
- ✚ Comprehensive – make sure you tell the customer about any ‘less than attractive elements’ of what you recommend





Figure 43: providing quotation

- ✚ Honest
- ✚ Straight-forward and easily interpreted and understood
- ✚ Concise – you certainly don't want to give customers the impression you are rushing them but you also need to be sensitive to:
  - Their need to 'get going'
  - Your need to get on with other work and serve other customers.





## Activity 2: Guided Practice



### Task:

A group of passengers have made reservation to visit at least the main available tourism resources in Rwanda. As a tour operator:

1. Identify the process of collecting customer information and travel needs to prepare invoice
2. List the activities associated with submitting draft quotation
3. Considerations when providing quotation information to passengers



## Activity 3: Application



### Task:

A traveler has made payments for various services, including tourism attractions, accommodation, activities, internet, food and beverage, transportation, rental car, and sauna massage. At the end of the tour, they will require a quotation or invoice for the services provided.

1. List the general quotation inclusions
2. Carrying out the invoicing process

## Topic 3.2: Applying the procedures to process licenses and permits



### Activity 1: Problem Solving



#### Task

Zachariah, is tourist who want to visit Rwanda and among his booking requests include self-tour guided and this service need tourist permit.

1. Where do you think Mr. Zachariah will get permission to visit Rwanda?
2. What are the basic information may be needed to know so that the tourist will drive himself?
3. Identify the concerned part or board where he can get more clarification of applying tourist permit

#### Key Facts: Procedures to process licenses and permits

- Applying the procedures to process licenses and permits

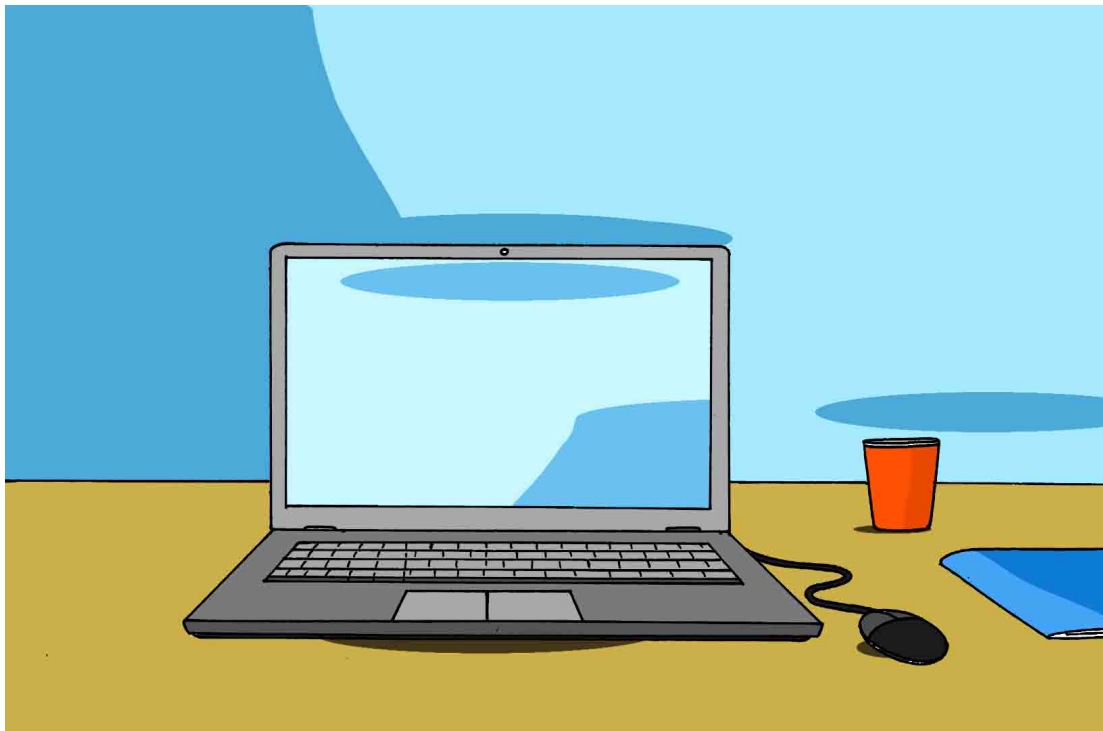


Figure 44 The procedures to process licenses and permits

✓ **Identifying the requirements to obtain licenses or permits**

Ensure that each visitor does their part by clarifying and verifying their passports against supporting documents. If there is any discrepancy such as incorrect spelling of names, it should be brought to the attention of the tour operator immediately for amendments.

## Application for Tourist Permit

PRODUCT AND VISIT DETAILS	VISITOR DETAILS	SUMMARY
Fields marked with an asterisk (*) are mandatory.		
Product And Visit Details		
Site *	<input type="text" value="Please select"/>	
Product *	<input type="text" value="Please select"/>	
Date Of Visit *	<input type="text"/>	
Slots Available	<input type="text"/>	
Number of Visitors *	<input type="text"/>	
Visitor Category *	<div><input type="radio"/> African Citizens</div> <div><input type="radio"/> African Residents</div> <div><input type="radio"/> East African Citizen</div> <div><input type="radio"/> East African Resident</div> <div><input checked="" type="radio"/> Foreigner</div> <div><input type="radio"/> Foreign Resident in Rwanda</div> <div><input type="radio"/> Rwandan Citizen</div>	
Notification details		
Notification mode *	<input type="checkbox"/> SMS <input type="checkbox"/> Email	

16

If visitors require an immigration card to travel, ensure that it is completed accurately and attach together with the passport.

- ✚ All people wishing to enter Rwanda must possess a valid passport or other internationally recognized travel documents
- ✚ An applicant should hold any genuine acceptable travel document valid not less than 6 months.
- ✚ A vaccination certificate may be required at the border post.
- ✚ In the event of a major disease outbreak, specific requirements could be set and put to the knowledge of the public.
- ✚ These are fees for processing of applications.

<sup>16</sup> [https://visitrwandabookings.rdb.rw/rdbportal/web/tourism/touristpermit#\\_48\\_INSTANCE\\_vnEd4049BXg8\\_%3Dhttps%253A%252F%252Fvisitrwandabookings.rdb.rw%252FrdBooking%252Ftourismpermit\\_v1%252FTourismPermit\\_v1.xhtml%253F%2526lang%253Den](https://visitrwandabookings.rdb.rw/rdbportal/web/tourism/touristpermit#_48_INSTANCE_vnEd4049BXg8_%3Dhttps%253A%252F%252Fvisitrwandabookings.rdb.rw%252FrdBooking%252Ftourismpermit_v1%252FTourismPermit_v1.xhtml%253F%2526lang%253Den)

- ✚ A citizen of East African Community Member States (Burundi, Kenya, Uganda, United Republic of Tanzania and South Sudan) shall be issued a pass/entry visa free of charge upon arrival to stay for the period of six months.

✓ **Identifying the cost of obtaining licenses or permits**

The cost of obtaining license or permits is provided by the concerned organization of RNP (Rwanda national police)

This service allows Rwanda citizens who passed the provisional driving test to apply for their provisional driving license. The service is provided by Rwanda National Police (RNP).

✓ **Obtaining licenses or permits**

**Experience Permit Booking Procedures**

Booking and reservations for all tourism experience permits are done on a first-come, first-serve basis;

Information about tourism experience in Rwanda are available at the **Visit Rwanda** website at <https://www.visitrwanda.com/> or any Rwanda Tourism Information and Sales Office.

Booking and reservations for all tourism experiences are done on-line with **IREMBO** at:

[www.irembo.gov.rw/tourism](http://www.irembo.gov.rw/tourism)

In case of any query or disagreements about experience permit applications and supporting documents please send your supporting documents to **RDB Tourism Reservation & Sales Offices** or by email at: [reservation@rwandatourism.com](mailto:reservation@rwandatourism.com).

Visitors, or Rwanda-based Licensed Tour Operators on their behalf, who make reservations for an experience permit must provide their full details at the time of payment including names, passport or national identification number, date of birth, country of residence, email and telephone number. Documents necessary for obtaining a tourist experience permit include:

- Passport or Identity / Residency Card;
- Proof of East African citizenship or East African residency; and
- Student identification card.
- For Children under 7 years of age – copy of passport and student ID. If no passport or national identification is available, an official document from the local government offices can be used as evidence of age.

17

<https://irembo.gov.rw/rolportal/web/dgie/east-africa-tourist-visa>, upon arrival or from Rwanda Diplomatic missions abroad.

18

<sup>17</sup> [https://www.visitrwanda.com/wp-content/uploads/2019/06/TOURIST-PRODUCTS-BOOKING-GUIDELINES\\_compressed-1.pdf](https://www.visitrwanda.com/wp-content/uploads/2019/06/TOURIST-PRODUCTS-BOOKING-GUIDELINES_compressed-1.pdf)

<sup>18</sup> <https://www.google.com/search?q=requirement+to+obtain+driving+license+in+rwanda&sxsrf>



## Activity 2: Guided Practice



### Task:

A family named Ketty is making a booking for a tour, and the head of the family requires tourism permits for various tourism experiences in Rwanda.

1. Identify the requirements to obtain licenses or permits
2. Identifying the cost of obtaining licenses or permits
3. Describe the ways to obtaining licenses or permits



## Activity 3: Application



### Task:

Visit the website and proceed the process followed while applying driving licence. Remember no to submit because you are not going exactly apply the licence.

## Topic 3.3: The procedures to restock outdoor tools and equipment



### Activity 1: Problem Solving



#### Task

A group of tourists have made a reservation to enjoy water bodies especially Kivu lake. To get more experience, there need more recreational tools and equipment.

1. Identify what recreational tools and equipment needed to enjoy water
2. Describe what factors to consider while selecting recreational tools and equipment.

#### Key Facts: The procedures to restock outdoor tools and equipment

Inventory restocking refers to the process of replenishing products at the right time and at the right place based on demand and projected sales.

- **Applying the procedures to restock outdoor tools and equipment**

#### ✓ Identifying the tools and equipment to restock

- ✚ Users must surrender their I.D. at the issue area to check out equipment.
- ✚ Users are responsible for the equipment they check out. An individual who fails to return checked out equipment or who returns damaged equipment must pay to replace the lost, stolen or damaged equipment.
- ✚ A variety of equipment for use in all areas of the facility is available for checkout



Figure 45 The tools and equipment to restock<sup>19</sup>

<sup>19</sup> <https://www.freepik.com/free-photos-vectors/camping-equipment>

- ✓ **Purchasing the tools and equipment to restock**

Figure 46 Purchasing the tools and equipment to restock

- ✚ Purchase orders
- ✚ Verbal orders
- ✚ Standing orders
- ✚ Telephone orders
- ✚ Online orders
- ✚ Facsimile orders
- ✚ Manual or computerized stock control/management systems.

- + Item required by description – brand name, type, quality
- + Size – bottle, drum, carton, individual item

- ✚ Ability of employees to use the items
- ✚ Quantity – numbers of each item required
- ✚ Price – as listed in a catalogue provided to the venue by the supplier (note that not all suppliers provide a catalogue/price list)
- ✚ Name of the supplier and their contact details
- ✚ Name of the venue ordering the items and their contact details
- ✚ Location the stock should be delivered to
- ✚ Date/time the stock is required.

✓ **Recording the tools and equipment to restock**

✚ **Methods to record**

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

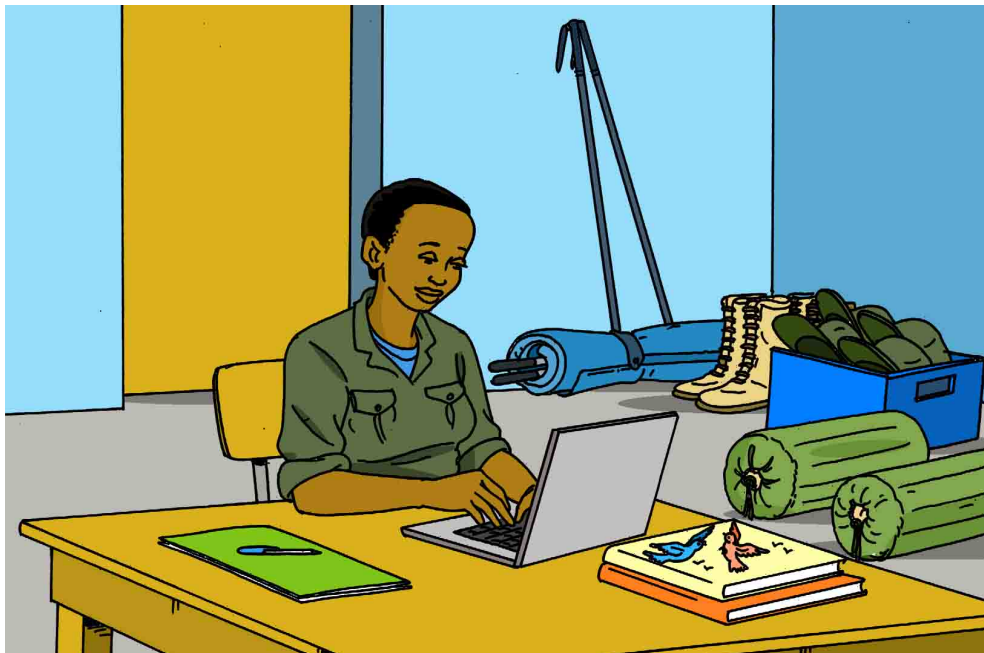


Figure 47: Recording the tools and equipment to restock

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

✓ **Ways to record tools and equipment to restock**

When recording tools and equipment to restock, the use of the three types of inventory recording (category, vendor, and item records) can be helpful.

- ✚ **Category records:** This involves recording by keeping information about groups of items to be restocked.





**Vendor records:** This involves recording by keeping information about the companies and people you buy items from.

**Item records:** This involves recording based on information of the individual tools or equipment to be restocked. You may have heard them called SKUs. Each item record must have a category and vendor associated with it.



## Activity 2: Guided Practice



### Task:

A group of travelers composed by 5 children and 8 youth and 4 elders. Youth wanted to enjoy adventure-based tourism activity that is hiking activity, children wanted to play piano, football, and swimming in a swimming pool, then, elders wanted to enjoy nature.

At the end of the tour, as a recreational officer, you are required to:

1. Identify the factors considered while collecting recreational tools and equipment
2. To describe how the stock area must be prepared for restocking



## Activity 3: Application



### Task:

A group of travelers composed by 5 children and 8 youth and 4 elders. Youth wanted to enjoy adventure based tourism activity that is hiking activity, children wanted to play piano, football, and swimming in a swimming pool, then, elders wanted to enjoy nature.

1. Select the recreational tools and equipment to be used by each sub-group
2. Collect the recreational tools and equipment used by each sub-group
3. Restock the used recreational tools and equipment as used by each sub-group

## Topic 3.3: Maintaining the activity documentation



### Activity 1: Problem Solving



#### Task

The Kivu beach is one of the rwandan place that receive mass tourists. And they came in different period of times with different purposes.

1. What are the travel documents that may be processed in tourism and hospitality industry for received customers?
2. What are the main factors considered while preparing client files?

#### Key Facts: Maintaining the activity documentation

**Client files** means of all information including data collection forms, client details, working papers, notes, research and corresponding which you have access (whether hard copy, in electronic form or otherwise) relating to any client to whom you have provided dealing or advising services under and during the term of this agreement.

#### Preparing clients files

- ✓ A travel document refers to an identification document issued by a government or an organization to facilitate the movement of individuals across country borders

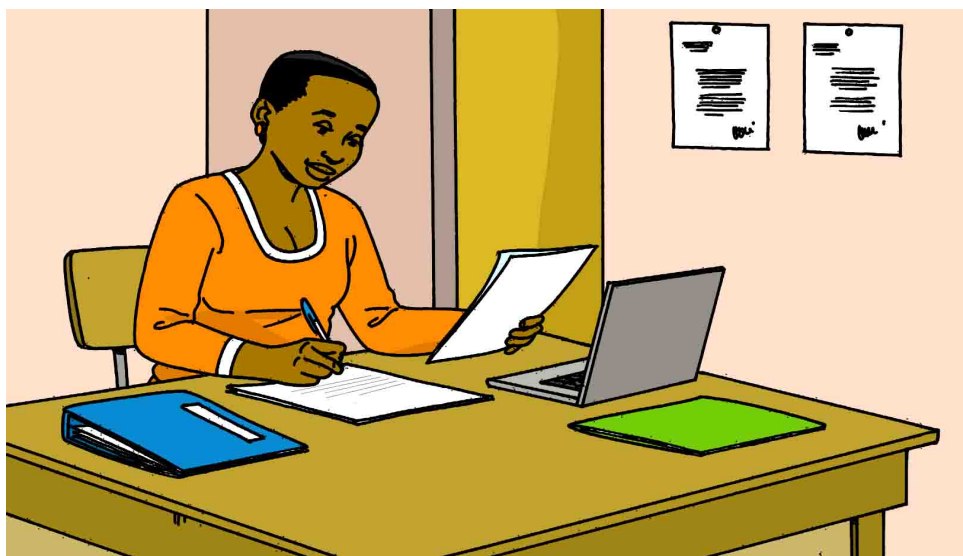
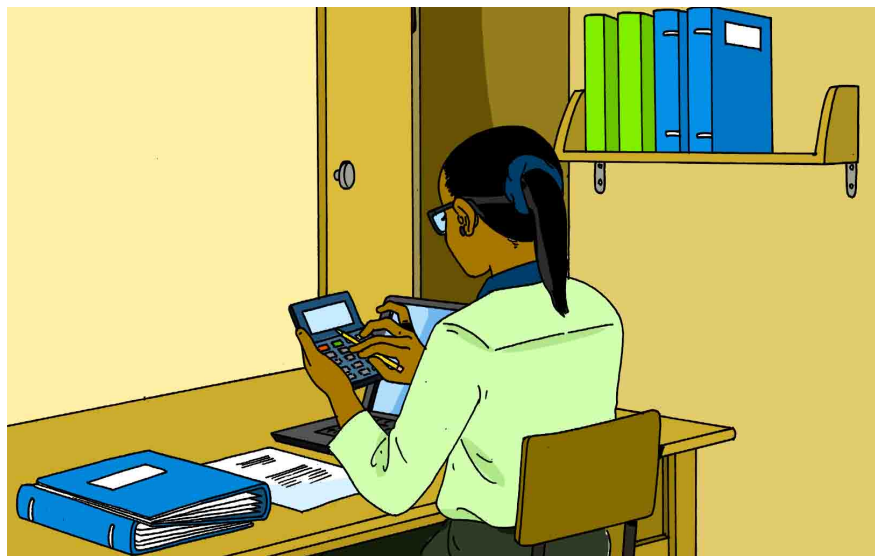


Figure 48: Preparing clients files

- ✓ However, note that not all identification documents are acceptable everywhere in the world.
- ✓ It is your responsibility as a traveler to check with your destination's officials and official tourism guides to make sure that you meet their requirements.

### **Preparing financial documents files**

Generate reservation-related documentation, when creating a reservation there is always documentation that needs to be prepared and issued to the customer or stored internally. This documentation needs to be stored appropriately and be easily accessible.



*Figure 49: Preparing financial documents files*

### **Receipts**

When guests make a payment such as a deposit (part payment) or full payment this will guarantee the reservation. Some guests choose to come into the establishment and pay by cash while others prefer to pay by credit card. The credit card information is taken. However, the amount is not usually processed until the guest arrives.



Figure 50: Receipts

In either case the customer must be issued with a receipt for proof of payment. This can be done either manually or printed by a computer or cash register. This record of payment is recorded on to the customer's reservation in the computer system.

### Invoices

Usually invoices are only issued to companies and travel agents for reservations made.

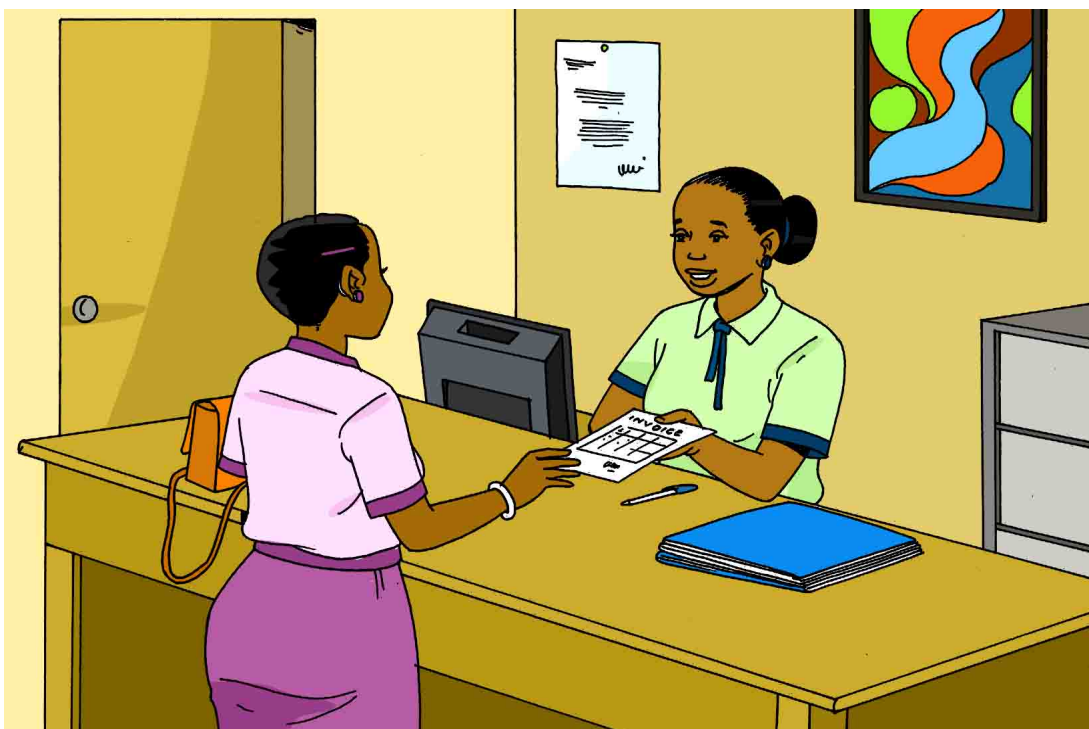


Figure 51: Invoices

This invoice will show the details of the reservation, room rate that has been quoted, the

commission payable and the total amount due.

### **Vouchers**



*Figure 52: voucher*

Vouchers are usually issued for prepaid reservations. The voucher states the value of the purchase to the bearer. Vouchers can also be gift vouchers given to people as presents or vouchers for conference delegates.

These vouchers are usually exchanged at the establishment as a form of payment and have a use by date or a specific date the voucher can be used on.

### **Confirmation letters**

A confirmation letter is sent to confirm a reservation. It will list all the details about the reservation; arrival and departure date, name, address, rate quoted, package details payment details and any special requests. These letters are usually printed on company letterhead and dated and signed by either the person who took the reservation or a manager.

### **Information packs and brochures**

An establishment might send out an information pack or brochures to provide additional information about itself.

Most establishments have printed information promoting the venue and its products and services.



Figure 53 Information packs and brochures<sup>20</sup>

Reservations staff can use these information packs as marketing to their customers.

## Process of collecting customer information and travel needs

Before we look at possible methods of recording information for quotations, it is important to briefly understand the process involved in collecting information and preparing quotations for customers.

Here is an example of a typical process:

- ✓ Initial customer contact – notes taken using a pro-forma quotation planner or enquiry sheet
- ✓ Quotation reference number allocated using internal office protocol – Manual or Electronic
- ✓ Follow-up quotation work with suppliers – notes added to pro-forma quotation planner, enquiry sheet – Manual or Electronic
- ✓ Copies of correspondence from suppliers – Printed and placed in file or saved electronically

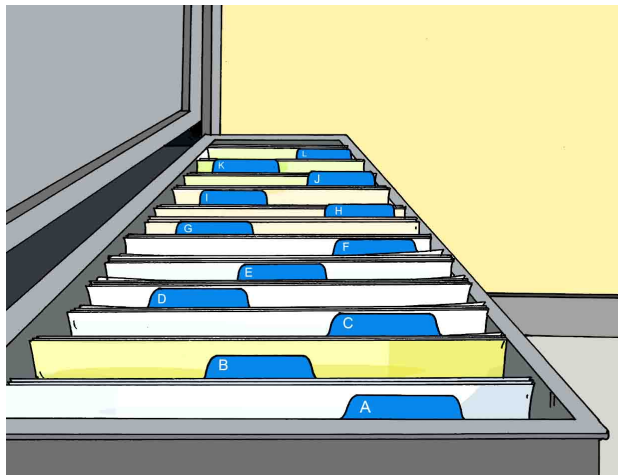
<sup>20</sup> <https://www.google.com/search?q=rwanda+tourism+attractions+BROCHURE&tbm=isch&ved=2ahUKEWiEq-PAYbr-AhVWcaQEHa4ZDhQQ2->



- ✓ Calendar book or diaries for follow-up – with suppliers or customer.
- ✓ **Preparing tools and equipment files**

#### **Filing methods:**

There five filing methods:



- ❖ Filing by subject/ category
- ❖ Filing by numbers/numerical order
- ❖ Filing by places/geographical order
- ❖ Filing in Alphabetical order
- ❖ Filing by dates/ chronological order.

*Figure 54: Filing methods*

Before filing any documents, you need to:

- ✓ Collect all relevant documents
- ✓ Inspect the quality of the documents
- ✓ Cross-reference your files
- ✓ Code the files
- ✓ Sort the files; then
- ✓ File the documents.

#### **Methods to record and file quotations**

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

- ✓ Hard copies – physical printouts filed in date order

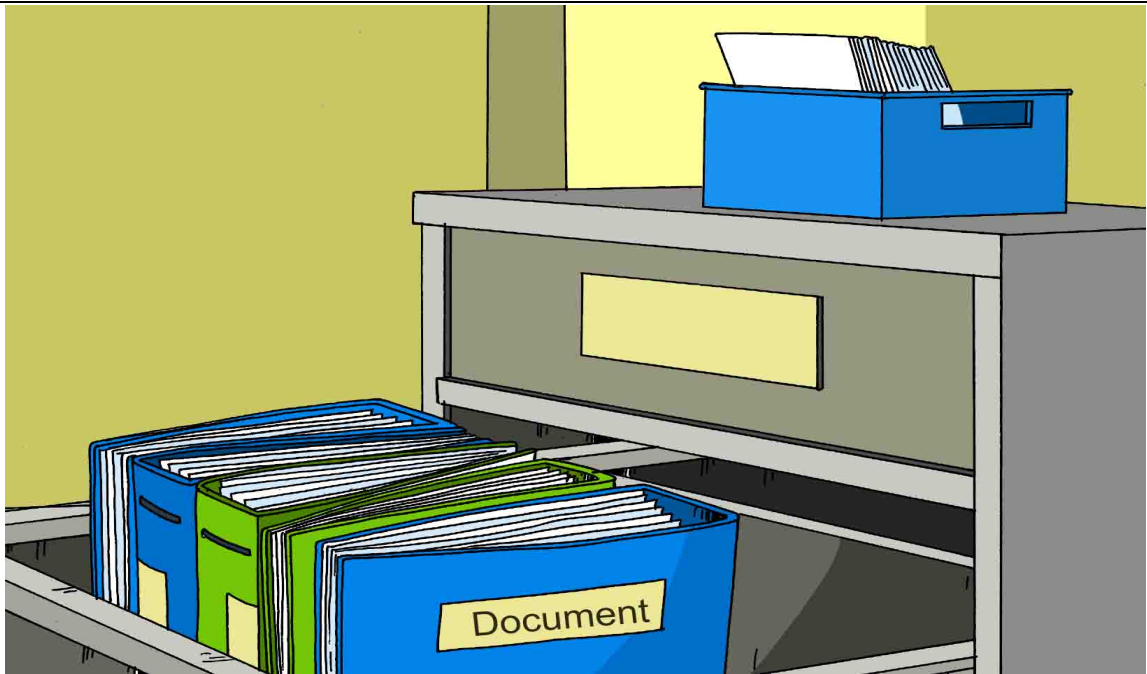


Figure 55 Record and file quotations

- ✓ 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 organization 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 2: Guided Practice



### Task:

If a group of tourists come and apply tourism activities where it is a must to pay for them.

1. Identify different ways they may use to pay for the tourism activities
2. Identify different financial documents that may be given back after payment.
3. How may you file the financial document?





### Activity 3: Application



#### Task:

Imagine you work in the front office of a large mass market tour operation.

1. Which 5 types of office documents may you come in contact with tourists at the end of tour?
2. Visit any closer tour operation and make a copy of an invoice used there



### Self-Reflection

At the end of every unit trainees should:

- 2) Re-take the self-assessment they did at the beginning of the unit.
- 3) Fill in the table above and share results with the trainer for further guidance.

Areas of strength	Areas for improvement	Actions to be taken to improve
1.	1.	1.
2.	2.	2.

## **Formative Assessment**

1. What are the five information of visitor's information on his/her invoice?
  - A. Clients name
  - B. Phone contacts and fax (if applicable)
  - C. Email address
  - D. Address
  - E. Month of travel
  - F. Length of travel and class of travel
2. The factors considered to obtain tourist licenses or permits involves:
  - A. Age
  - B. Travel document
  - C. Purposes of visit
  - D. A. and C
  - E. None of them
  - F. All of them
3. Identify the way a visitor may obtaining licenses or permits
4. Manual recording is the only one way used to record the tools and equipment to for restocking after tour.
  - A. True
  - B. False
5. Describe the two main types of client files
6. Choose one tour company you many know in Rwanda, go there and observe how practically the financial manager maintains the activity documents. Make a report on what you have learnt from your study tour, and respond to the following questions:
  - A. What are the five information of visitor's information on his/her invoice?
  - B. What did he perform poorly?
  - C. What is your advice to him?



## Points to Remember

- Knowledge of different types of invoices together with the difference between invoice and receipt is very important when applying procedures for receiving and processing invoices.
- Knowing the right information sources is very helpful when applying the procedures to process licenses and permits.
- Effective and periodic stock inventorying, is very helpful when applying the procedures to restock outdoor tools and equipment.
- Knowledge on how to prepare client files, financial document files, and tools and equipment files is very important when maintaining the activity documentation.

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