

TourTools v5

User Guide



Table of Contents

Copyright & Trademarks	5
System Requirements	6
System Architecture.....	8
Chapter 1: Introduction	11
FileMaker Pro & TourTools	13
Workstation/Staff Setup	19
The TourTools v5 Dashboard	23
Key Metrics	25
User Settings	27
Business Settings	30
System Settings	35
New Enhanced Email Module.....	38
Sending Single Emails to Clients & Vendors	41
Sending eBlasts to Client & Vendor Groups	43
Sending eBlasts in the Tours Module.....	48
Sending Emails in the Packages Module	50
Emailing Charts, Documents, & Reports	52
Chapter 2: Clients.....	55
Client Module – List View	56
Client Module – Detail View	64
Adding a New Client.....	77
Making a New Booking for a Client.....	80
Making a New Proposal for a Client	81
Client Reports & Docs	82
Chapter 3: Vendors	84
Vendor Module – List View.....	85
Vendor Module – Detail View	91
Adding a New Vendor	97
Managing Currency	99
Vendor Product Notes	101
The Product Library & Contracted Services.....	107
Using “Set Pricing” with Restaurant Service Only	120
Vendor Reports & Docs.....	122
Chapter 4: Tours.....	123
Tours Module – List View	124
Tours Module – Detail View	126

Adding a New Tour	147
Duplicating a Tour	150
Moving a Tour to New Dates	153
Cancelling a Tour & Closing Out Bookings/Operations Records	154
Tour Reports & Docs.....	157
Chapter 5: Packages	160
Packages Module – List View.....	161
Packages Module – Detail View	163
Adding a New Package	171
Cruise Packages	173
Itinerary Building	175
Package Pricing & Publishing.....	183
Duplicating a Package	188
Creating & Managing Proposals	190
Package Reports & Docs	192
Chapter 6: Bookings	193
Bookings Module – List View.....	194
Bookings Module – Detail View	196
Adding a New Booking	207
Adding a New Group Leader Booking	215
Canceling or Rebooking a Reservation	224
Fundraising Distributions.....	225
Booking Reports & Docs	227
Credit Card Passthru Payment.....	233
Payments & Refunds.....	236
Chapter 7: Operations	244
Operations Module – List View.....	245
Operations Module – Detail View	247
Creating New Operations Records	258
Operations Reports & Docs.....	260
Chapter 8: Money	263
Money Module – List View	264
Money Module – Detail View	266
Money Reports & Docs	269
QuickBooks.....	270
Chapter 9: Tasks	271
Tasks Module – List View.....	273
Tasks Module – Detail View	275
Adding New Tasks	278
Task Reports & Docs	280

Chapter 10: Options	283
TourTools Online	284
Managing TourTools Online in FileMaker	285
Client Details	286
Tour Details	287
Package Details	291
Bookings & Payment Details	295
Global TTO Settings	300
TourTools Website Functionality	301
Accessibility	314
MailChimp	315
DocuSign Sync	320
Email/Task Automation Module (ETAM)	321
Sales Module	330
QuickBooks Module	332
.....	338

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TourTools v5 User Guide

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Last modified: December 25, 2022

System Requirements

TourTools System Requirements

General

TourTools is built on FileMaker technology and system requirements are closely linked to those of the FileMaker software itself. Specifications are subject to change as Claris, Inc. continues to evolve and test their products. **TourTools v5 supports FileMaker 17 or newer.**

» [FileMaker 19 Technical Specifications](#)

» [FileMaker 19 Installation and Configuration Guide](#)

Please note that if you do not have IT staff, we are happy to review your computers to confirm if they are compatible with TourTools and/or FileMaker products. Otherwise, consult your IT specialists if you are unsure. The basic system requirements for running FileMaker 19 and TourTools v5 are below.

Server

RECOMMENDED HARDWARE

- 4-Core CPU
- 8 GB RAM
- 500+ GB or more hard drive, SSD recommended (250 GB if no other software will be installed)
- Ethernet only

SUPPORTED OPERATING SYSTEMS*

- Windows Server 2016 or newer

*Windows Server Datacenter is compatible with FileMaker Server 19, but has not been fully tested; TourTools does not support Apple servers.

Workstations

APPLE/MAC

RECOMMENDED HARDWARE

- M1, Intel iSeries (i5/i7) Processor
- 8+ GB RAM
- Graphics device with minimum 1600 × 900 resolution (maximum 1920 × 1080)

SUPPORTED OPERATING SYSTEMS

- macOS Sierra 10.12 or newer

WINDOWS

RECOMMENDED HARDWARE

- Intel iSeries (i5/i7) Processor
- 8+ GB RAM
- Graphics device with minimum 1600 × 900 resolution (maximum 1920 × 1080)

SUPPORTED OPERATING SYSTEMS

- Windows 8.1 Standard and Pro Edition or newer
- 64-bit only

Note: Windows 7, Windows Home Edition, 32-bit Windows are not supported.

Last modified: November 27, 2022

System Architecture

TourTools is built using the FileMaker platform. FileMaker is a cross-platform relational database application from Claris International, a subsidiary of Apple Inc. It integrates a database engine with a graphical user interface (GUI) and security features, allowing users to modify the database by dragging new elements into layouts, screens, or forms. It is available in desktop, server, iOS and web-delivery configurations.

FileMaker Server allows centralized hosting of apps which can be used by clients running the desktop or mobile apps. It is also available hosted by Claris, called FileMaker Cloud.

This is the basic entity relationship diagram for TourTools v5 back office:



TourTools Online is built using PHP and Yii framework. It is an MVC based web application using the Bootstrap (twitter) framework to provide a compatible and accessible interface. Also, the use of standards compliant MVC/Front End architecture allows for TTO to be modified and enhanced as needed. All of the software used is open source and kept up to date as per client needs. The application is compatible with the most up to date version of PHP (currently, version 8).

The application acts as an interface to the backend FileMaker server application via the FileMaker/PHP API hosted either in-house or at an approved managed 3rd party hosting provider on a managed basis.

All libraries used in the web application are updated as per availability and the architecture (separated backend-database and front-end web application) allows for secure DMZ environments. The interface between the web application and the backend are implemented according to best practices and vendor specification.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: November 29, 2022

Chapter 1: Introduction

Getting Started with TourTools v5

This manual is intended to explain the basic functionality of TourTools™ and the “how to” of specific tasks. Because the software can accommodate diverse business models, the manual should be supplemented by specific notes taken during your training.



It's important to note that, in spite of the fact that TourTools™ was initially developed decades ago, it continues to evolve and improve based not only on technological advancements, but also input and requests from its many users. That being said, some of the customization that has been incorporated in the system may not be widely applied and so is not addressed in this manual. If you see fields or layouts that aren't explained but about which you are curious, be sure to ask...we'd be happy to do a “show and tell”!

New Features in TourTools v5

- New cleaner and more intuitive user interface
- Significant reporting workflow improvements and several new powerful reports
- New Enhanced Email Module for more powerful email marketing and campaign tracking; eliminated the need for an email plugin
- Integration with MailChimp for contact synchronization and management
- Improved QuickBooks interface and workflow; new compatibility with QuickBooks Online
- Optimized for the cloud for optimal performance on remote servers
- The ability to quickly change Tour dates
- A new built-in payment gateway with better features/security than Auth.net and PayPal
- Improved Client Module to facilitate additional contacts
- Improved Bookings Module provides “shopping cart” style workflow for multiple passenger bookings via TourTools Online
- Improved fundraising functionality to allow payment distribution from a single source

- Client duplication management and merge functionality
- Optimized group leader reporting for TourTools Online
- Improved access to data export functionality from primary areas of the system
- Much greater access to settings so you have greater control and do not need to request support for changes
- User-level settings that allow users to set color themes and certain dashboard and email preferences

TourTools v5 Demo



<https://player.vimeo.com/video/735877838>

Last modified: March 27, 2023

FileMaker Pro & TourTools

About FileMaker Pro

TourTools™ is written in FileMaker Pro®, the number one selling database software, that offers easy organization and sharing of data.

You should be aware of two somewhat unique features of FileMaker Pro. Generally speaking, there is no “save” command. A record is created as soon as you click on the “+ (new)” button. In addition, if you overtype data already present in a field, the original text is obliterated as soon as you leave the field. In most cases, you will not be asked if you want to save the record or the changes.

There is also no “un-delete” command. Once you delete a record, it’s gone forever, so be very certain that you know where you are in the system before you invoke the “delete” command (this function is “second guessed”; i.e. you will be asked to confirm the deletion). In most cases, the delete command is made available only to manager and owner level logins.

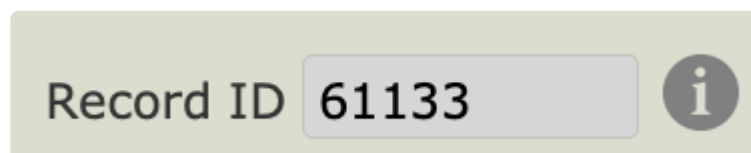
About Relational Databases

TourTools™ is what’s known as a “relational” database. What this means is, the different modules of TourTools™ are inter-related, so that when you enter data in one, the information is shared with other parts of the program that need it. For instance, when you enter a name in a Client record, you will never have to type that name again to make a Booking, print a piece of correspondence, or produce a rooming list or manifest.

General “Tips and Hints”

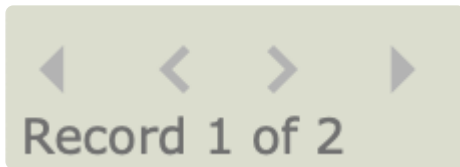
Screen Layout and Moving Around the System

In the upper right of most screens, you are able to reference the ID number of the record you have open. ID numbers are unique and are automatically assigned by the system as records are created. Click on the info button (as seen below, a circle with an “i” in the middle) to view creation and modification info related to the record you are viewing.



In the upper left corner of most screens, you can see the total number of records in your “found set” (explained in more detail later). Clicking the symbols < and > will advance you forward or back, one record at a time; clicking on the solid triangle button pointing left will take you to the first record in the set; clicking on the triangle button pointing right will take you to the last record.

A new feature in version 5 is the “CFS Portal” just below these arrows (CFS = Current Found Set). Clicking on any record in this portal produces the same result as advancing from record to record using the arrow buttons; but, using the CFS Portal you are not “blind” – you can actually jump right the to record you want by selecting it.



Record 2 of 17623

Vendor Details

VENDOR INFO: Blue Diamond Tours

Select/View Vendor

Country Cascades (David Kinney)

Blue Diamond Tours (Bob Davidson)

Charleston Area CVB (Jennifer Aiken)

Chelsea Brewing Company (Cindy Coligan)

Christ in the Smokies CLOSED (Dottie)

Clarion Hotel & Conference Center (Lorrie Motyka)

Clarion Hotel & Suites Montreal CLOSED (Connie Puga)

Clarion Hotel at the Palace (Tim Dent)

Clarion Hotel Universal (Kelly Deremiah)

Clayton County Convention & Visitors Bureau (Beth Bailey)

Collette Vacations (Kevin Carter)

New Orleans Steamboat Company/Gray Line (Dane Bano)

Newport Mansions of the Preservation Society (Dan Fryer)

Niagara Duty Free Shops Inc. (James Craig)

Norfolk Botanical Garden (Heather Fitzpatrick)

Active x

Vendor Name Blue Diamond Tours		Type of Vendor Tour Operator	Service Category Operations
Service/Onsite Address 207-4 Coxton Close		Metro Area	QB Vendor ID
City Halifax	St/Prov NS	Postal Code B3M 4J5	Taxpayer
Country Canada	Website info@bluediamondtours.com	OK to use? OK to Use	Default Currency USD
Reservations Link		CRITICAL NOTES Important notes that should be v	

Vendor Contacts & Notes

Products / Prices

Tours

Itinerary & Proposal Notes

Deadlines

Email Log

VENDOR CONTACTS

★	First Name	Last Name	Title	Email
	Bob	Davidson	Steve Cell: 782-234-5603	tourtoolsusa@gmail.com

☒ Onsite
 ☐ Group Sales
 ☐ Sales
 ☐ Meals
☐ Accounting
 ☐ Marketing
 ☐ Rooms
 ☐ Events

Work # (902) 444-6883
Cell #

Toll Free
Fax #

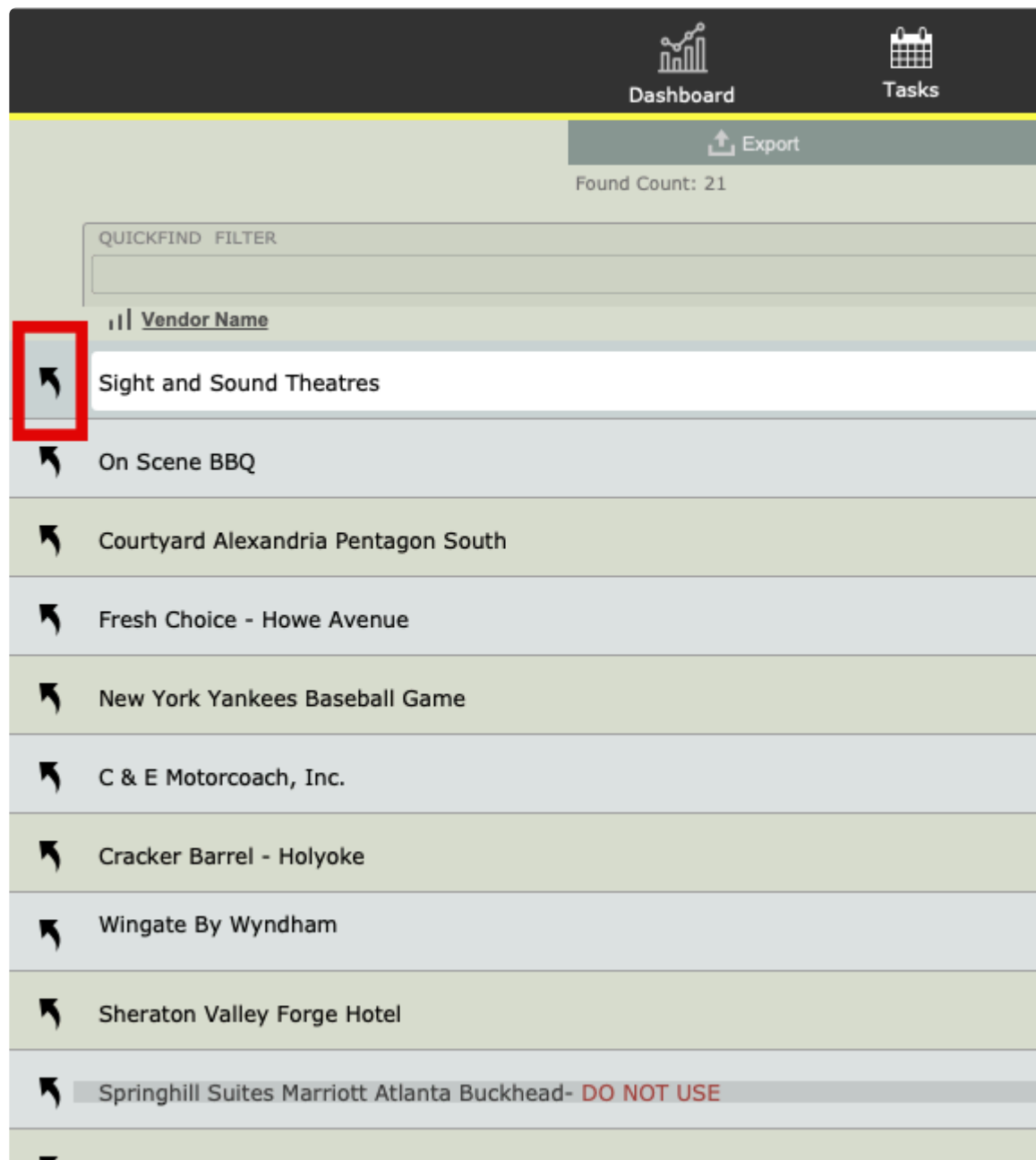
NOTES

+ General Note
+ Call
+ Email
+ Fax
+ Letter
+ Meeting

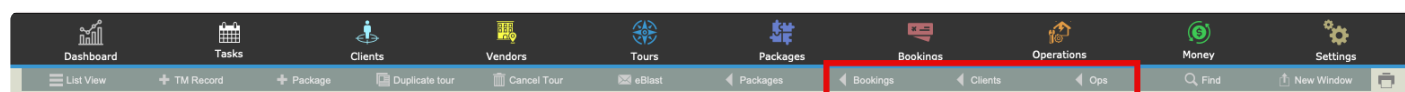
Compose a new note here, then click the applicable button above. The GENERAL button adds a general note to the vendor record (below), the specific buttons will add your note below and also add an entry to the activity log to the right.

CURRENT FOUND SET

While you are viewing any list, clicking on the up-arrow button to the left will open the details of that record.



Below the bank of large **Module Navigation Buttons** at the top of the screen, you will often find a thin green/gray bar of **Feature Buttons**. Some of the things these buttons can do is perform a **Find**, or **Show All** records, **Export** data, send an **eBlast**, or navigate you to **Related Records** in another module (any button with a back pointing solid triangle will take you to “related” records in the module indicated). Any button with a “+” on it invites you to create a new record of the specified type.



Using “Find”

Throughout the system, you will see “Find” buttons (see screenshot above) in the **Feature Button Bar**

which, when clicked, invite you to input search criteria and create a “found set” of matching records.

Example

In your Client module, you want to find all clients with the last name of Nelson. Once having clicked on “Find”, you will be asked if you want to stay on the current screen or use a “Find layout”. Click on “Find” and in the field designated Last Name, type “Nelson”. When you click “Submit”, you will be presented with a list of records that match the criteria. The limited number of records representing clients with the last name Nelson is called a “Found Set”.

To leave the “Found Set”, click on “Records” from the FileMaker menu (which runs along the very top of your screen) and then on “Show All Records”.

It is possible to do a “layered” Find by using one and then another criteria for your lookup.

Example

You want to do a mailing to all clients living in Michigan and Indiana. Using the “Use Find” layout, type MI in the “State/Prov” field, then click on “Another +”. This time type IN in the same field and click on the “Submit” button.

You can also use the “omit” function to find “everything but” a select group of records.

Example

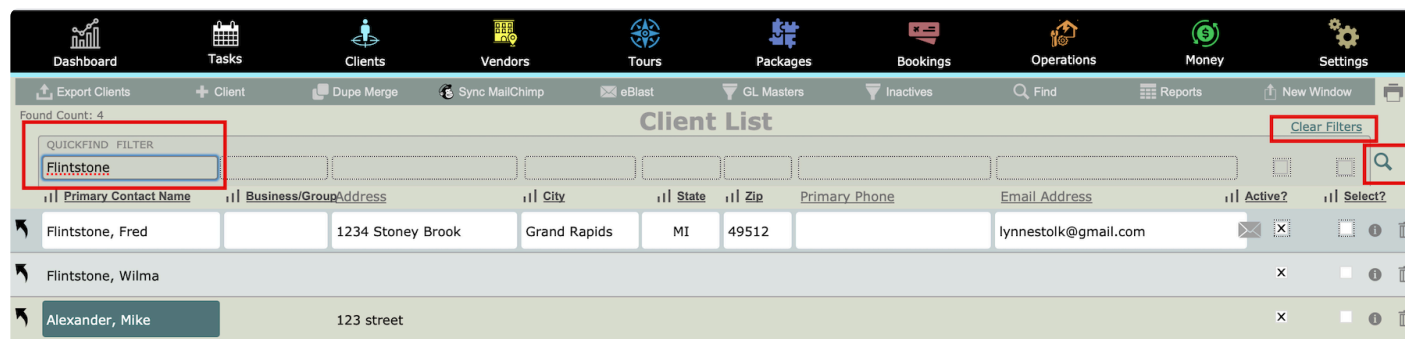
In your Client database, you want to find all customers except those living in Michigan and Indiana. Follow the instructions as outlined above and once your found set presents, click “Records” from the FileMaker menu and then on “Show Omitted Only”.

Important

Whenever you run documents, labels, etc., be aware of whether all records are available or if you are within a Found Set. If you want to generate labels for all clients, by example, but start the report within a “Found Set”, the output will be incorrect and you may not even realize it.

Using the “QuickFind Filter” in TourTools

Throughout the system, you will see the **QuickFind Filter** boxes and buttons at the top of most lists. Type search criteria in the appropriate boxes that sit above the column you want to search. Once all of your criteria is entered, click the magnifying glass button (or just hit the ENTER key on the keyboard) to filter the list. Click **Show All** in the **Feature Button Bar** to add all records back to the current found set. Click “clear filter” to clear the search criteria from the filter boxes.



Scripts

Scripts are sets of programmed instructions that basically drive the software. Most are working in the background, invisible to the user and many are attached to the various “buttons” visible on the layouts. A good example: The buttons that open various reports are simply running a script. Clicking on any one of them runs a script that results in the generation of a document or report. As you invoke various processes in the system, watch for script prompts to “continue”, “finish”, “submit”, etc.

Value Lists

Many fields have what are called “value lists” attached to them. The choices that denote the tour type in Tours, by example, are part of a “value list”. The choices that populate the various check boxes on the Marketing tab in Client also draw from value lists. The lists are maintained in one of several ways. At the end of some lists you will see the word “edit”. Clicking on it will take you directly to the place where you can do your editing. Many are maintained in Settings > Business Settings > System Modules > Value Lists.

Important

Before completely removing or changing the spelling of any value in a list, be aware that the original value may already be in use. Be sure to find those instances and update, as necessary, the records that will be affected by whatever change you have in mind. In addition, don’t type data directly in a field that is connected to a value list in lieu of choosing a value. Doing so will tag your record with a value that technically doesn’t exist, given it’s not in the list.

Fields

The majority of data fields used on layouts in TourTools™ are white or gray. The white invite input and most of the gray are inaccessible. Clicking on them usually generates a message that they are “non-modifiable”. This is usually because some sort of calculation or lookup is taking place in that field.




Portals

Throughout the system, you will find displays of records that are similar or related, presented in lists called “portals”. In this example, taken from the “Itinerary” tab in Package, 3 contracted services for a particular Package are shown.

REVIEW/MANAGE ITINERARY**Package Bookings**

Duplicate

Trav Adults Kids Single Double Triple Quad

Vendor	Description		Date Begin			Date End	
 Compass Coach	55-Seat Deluxe Motorcoach	—	Sun, Jun 25, 2023	+	Lock	Fri, Jun 30, 2023	+
 JW Marriott Hotel	Double-Double Rooms including Buffet Breakfast	—	Sun, Jun 25, 2023	+	Lock	Fri, Jun 30, 2023	+
 Sundance Grill	Three Course Dinner including Gratuity	—	Tue, Jun 27, 2023	+	Lock	Tue, Jun 27, 2023	+

Number of “Seats” Available in TourTools v5

If you have purchased 10 “seats” in TourTools, when the 11th person tries to log in they will receive a message indicating the seat count is at capacity and will be logged out. To purchase additional seats, contact the TourTools support team.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Workstation/Staff Setup

PC|Windows Workstation Setup

Please follow these steps to ensure proper setup of workstations that will be accessing the TourTools Back Office system. This document is written for Owners/Managers, working alongside IT personnel if needed, and assumes a certain level of familiarity with basic IT tasks.



<https://player.vimeo.com/video/780424945>

1. Add New Staff Member to the TourTools system

Step A

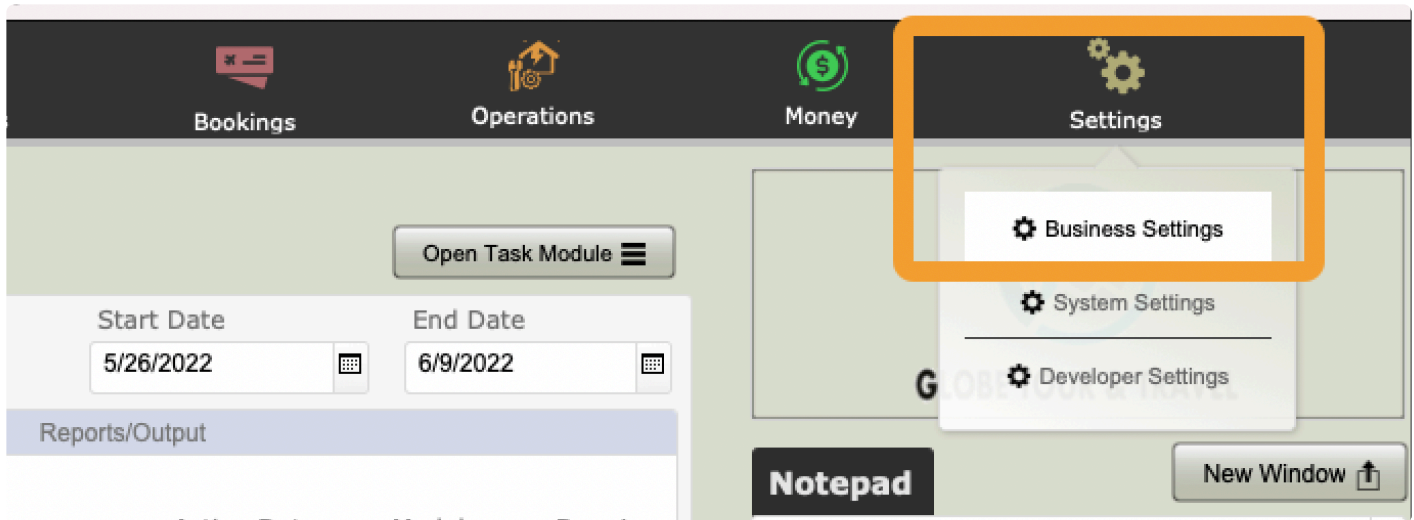
Log in to TourTools as Owner or Manager

Open TourTools and log in as either **Owner** or **Manager** – only these accounts are allowed to add and delete Staff Records. A list of login account names and passwords were provided to the Owner upon purchase of TourTools.

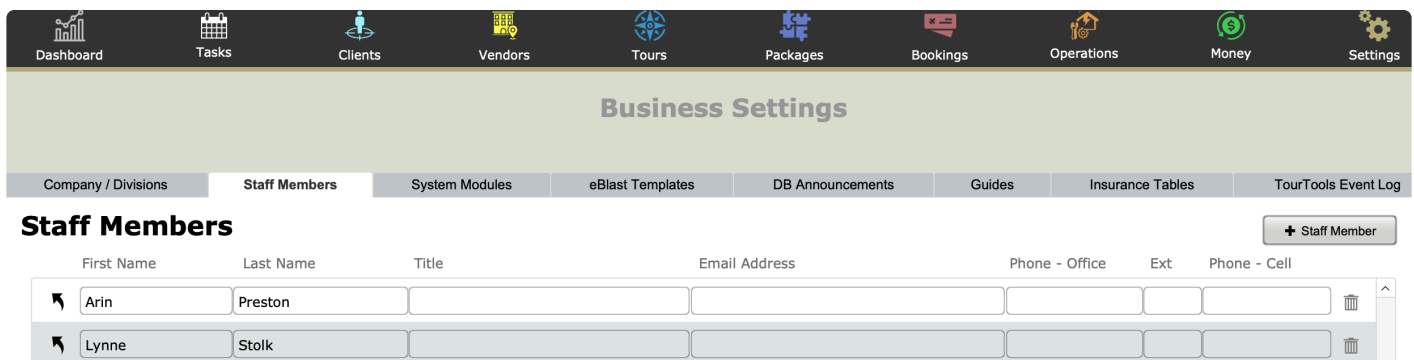
Step B

Add the Staff Member to TourTools

Add the new staff member to TourTools by opening the **Business Settings** and selecting the **Staff Members** tab.



From there, click the **+ Staff Member** button to add the new Staff member to TourTools. Note how the name is entered in the Staff record; it will be important to set the Username in FileMaker to match it, exactly (e.g. – If it is Barb Smith in the Staff record, it should not be Barbara Smith in the Username preferences to be set in step 3 below.



2. Install FileMaker Pro on the Staff Workstation

Once you complete the purchase of FileMaker, you will receive an email containing the license key and software download links. Download the installer for FileMaker Pro Advanced to be installed on user workstations.

Install and register the software as directed in the automated process. Do not add a shortcut to FileMaker to the user desktop, as this can cause confusion. You will be given a **Launch File** that can be distributed and placed on all user desktops to make access to TourTools quick and easy.

3. Set Up FileMaker Preferences & the TourTools Launch File

Step A

Set the Username in the FileMaker Pro Preferences

TourTools should be closed (if open) and FileMaker Pro should be opened by itself. Once it is open, go to

the **FileMaker Preferences** from the **Edit Menu** (If you are on a Mac, it will be in the **FileMaker Menu**). On the **General Tab** of the preferences, about half way down, type in the **User Name** as the staff member's Full Name as entered in the staff record in step 1.

Preferences

General | Layout | Memory | Shortcuts | Plug-Ins | Permitted

User Interface Options

- ☒ Allow drag and drop text selection
- ☒ Show recently opened files:
- ☒ Use Manage Database dialog to create files

Reset dialog sizes and positions:

User Name

☐ System: "AJ Preston"

☒ Other

Application

- ☒ Notify me when an update is available
- ☐ Notify me when a new version is available
- ☒ Use advanced tools
- ☐ At startup, open file

Step B


Identify Which Login Account is Assigned to the User

The Owner will assign the user with a TourTools login appropriate to the level of access they should have to

the system; these credentials should be saved to the Keychain or Credential Manager on the workstation and not given to the user directly.

TourTools has 5 accounts, by default, for accessing the system (credentials provided at time of purchase):

1. **Owner:** Allows the highest level of access to the system short of “full access” privileges, which are reserved for TourTools developers only – the Owner login has access to all system settings, data, and reports.
2. **Manager:** Allows access to value lists, layouts, exporting of records, deletion of records and data warning overrides; has access to limited financial information.
3. **Operations:** Can do all that the Reservations login can do but can also create Tour, Package, and Operations records; access is denied to spreadsheets after pricing.
4. **Reservations:** Can create and edit, but cannot delete or cancel, Client or Booking records; cannot create Tour, Package, or Operations records.
5. **Help:** Can basically browse records – cannot create or edit; can run some reports including brochure requests/labels; can run Receipts, Confirmations, and Invoices; Most data, including financial information, is restricted/protected.

 By Default, only Owner & Manager have access to Business/System Settings, the Money Module, Export/Delete Functionality, and the ability to toggle Clients from Active to Inactive.

For more information, here is a [detailed permissions matrix](#).

Step C

Add the TourTools Launch File to the User Desktop. Ask TourTools support to provide this if you have not received it.

Step D

Save the User Login Credentials

Open TourTools by double-clicking on the Launch File and check the box to save the TourTools Login information. Enter the account name and password that was identified in the previous step.

If at any point the user/workstation is given a different login account (a new level of access), the existing saved credentials will need to be deleted from the Keychain or Credential Manager and resaved with the new credentials.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

The TourTools v5 Dashboard

So, to begin, the TourTools Dashboard appears when you open the TourTools™ software solution.

The large **Module Navigation Buttons** at the top of the screen allow quick access to the primary modules of the system. There is a Notepad area for keeping track of random thoughts, task, notes as needed – these are user specific.

At the top of the Dashboard, you will be welcomed by name (if not, see “Workstation/Staff Setup” section just prior to Chapter 1) and a date range will be specified by the Start and End Date fields.

TourTools Dashboard

User Name: Arin Preston Start Date: 11/01/22 End Date: 12/10/22 + Add Task

Task Description	Group/Vendor	Details	Action Date	Origin	Done!
Make final payment to vendor	JW Marriott Hotel	EXPGR06252023	11/03/22	Ops	<input type="checkbox"/>
Call about past due payment again		EXPGR06252023 Fred Flintstone	11/19/22	Bookings	<input type="checkbox"/>
Send first payment reminder notice		DCPERF10282023	11/22/22	Tours	<input type="checkbox"/>
Send rooming list update	Courtyard Alexandria Pentagon South	Arin Preston	11/27/22	Vendor	<input type="checkbox"/>

PAST DUE DUE TODAY DUE WITHIN 7 DAYS

Key Metrics | Charts & KPIs

*Booking Activity: Total A/R: \$25,116 Total A/P: \$16,110 *Total Sales: *Total Profit:

DATE RANGE: 10/01/22 10/31/22 PRESETS: Last Month This Month Last Year This Year Refresh All Data

OWNER MANAGER STAFF

* these metrics are impacted by the date range selected

TourTools Support Resources

(888) 822-7988 New Support Ticket

tourtools.com/support support@tourtools.com Open User Guide

Saturday, November 19, 2022 **TOURTOOLS v5** ARIN PRESTON [ACCESS LEVEL: ARIN] SIGNED IN SIGN OUT

Any **Tasks** (explained in more detail in Chapter 9) assigned to you and due within that date range will appear in the Task List. To change the date range, use the small calendars that appear when you click in either or both date fields. To look at a colleague's tasks, if they are out sick for example, click in the User Name field and make a selection. Tasks are color coded: red if past due, yellow if due today, green if upcoming within the week, and no color if a task is farther out than a week.

At the bottom of the Dashboard, there is a section related to key metrics and performance indicators for your company. Some of the charts and metrics available here can be shown for a specific date range by using the start/end date selectors. The various charts and metrics are visible/available based on log in permissions – some are only accessible to those logged in as **Owner** or **Manager**. If you are not interested

in key metrics, this section can be disabled in **User Settings** and replaced with **System Module** buttons alternatively.

Default Setting/View – Key Metrics

Key Metrics Charts & KPIs					TourTools Support Resources	
*Booking Activity: 12 Total A/R: \$25,116 Total A/P: \$16,110 *Total Sales: \$2,387 *Total Profit: \$0					(888) 822-7988 New Support Ticket tourtools.com/support support@tourtools.com Open User Guide	
DATE RANGE: 01/01/22 12/31/22 PRESETS: Last Month This Month Last Year This Year Refresh All Data						
OWNER: [dropdown] MANAGER: [dropdown] STAFF: [dropdown]						

* these metrics are impacted by the date range selected

Alternate Setting/View – System Modules

System Modules				TourTools Support Resources	
Airport Codes	Guide Management	Staff Database	Value Lists	(888) 822-7988 New Support Ticket tourtools.com/support support@tourtools.com Open User Guide	
Currency	Marketing Data	Terms & Conditions	Zip Codes		

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

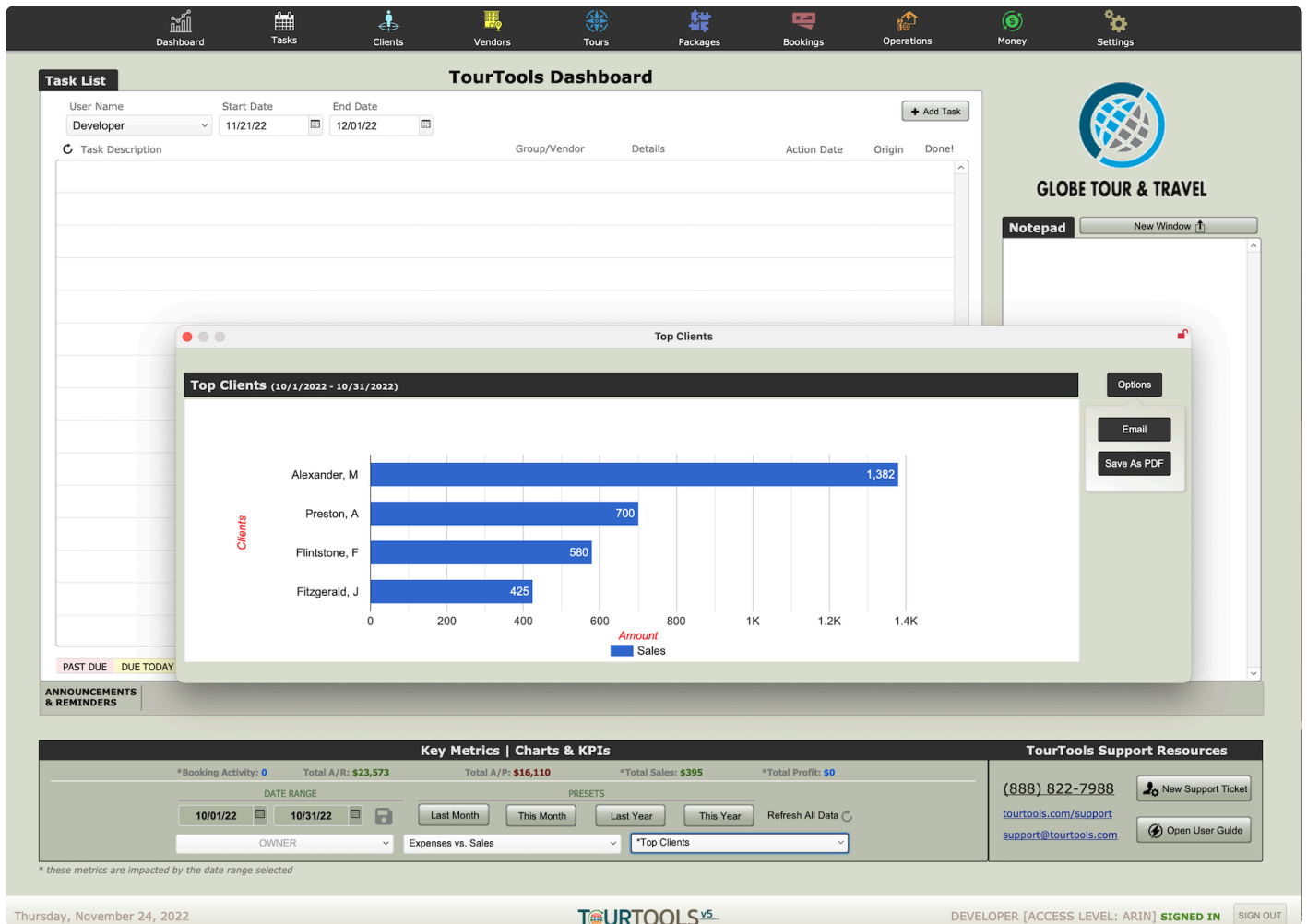
Last modified: December 14, 2022

Key Metrics

The **Key Metrics, Charts & KPIs** section of the dashboard is new in TourTools v5 and is located at the bottom of the Dashboard. Some of the charts and metrics available here can be shown for a specific date range by using the start/end date selectors (or the presets, like LAST MONTH, THIS YEAR, etc.); these items are marked with an asterisk. The various charts and metrics are visible/available based on log in permissions – some are only accessible to those logged in as Owner or Manager (items related to profit and sales primarily). If you are not interested in key metrics, this section can be disabled in User Settings and replaced with System Module buttons, which may be more useful and allow quicker access. Keep in mind that System Modules are accessible only to the Manager and the Owner logins.

The screenshot shows the 'Key Metrics | Charts & KPIs' dashboard. At the top, there are four KPIs: '*Booking Activity: 0', 'Total A/R: \$23,573', 'Total A/P: \$16,110', and '*Total Sales: \$395'. Below these is a row of controls. On the left, under 'DATE RANGE', are date selectors for '10/01/22' and '10/31/22' with calendar icons and a save icon. In the center, under 'PRESETS', are buttons for 'Last Month', 'This Month', 'Last Year', and 'This Year'. On the right is a 'Refresh All Data' button with a circular arrow icon. Below these controls are three dropdown menus: the first is set to 'OWNER', the second is 'Expenses vs. Sales', and the third is '*Top Clients'.

The KPIs along the top of the section display key figures drawn from the data in your system. The far right section provides quick access to TourTools Support resources. The drop downs at the bottom provide access to charts that are created by data drawn from your system. These charts can be printed or emailed. You can have as many charts as you like open at the same time for analysis. Click on the REFRESH DATA button to update the data with recent activity (NOTE: the refresh process can take up to 2 minutes).



You can have multiple charts open at a time and each one offers the option to **Save as PDF** or to **Email**

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

User Settings

Clicking on the large Module Navigation button labeled “Settings” at the top right of the screen allows access to various settings for the TourTools system. All can access User Settings; Business and System Settings are available to Owners and Managers only; Developer Settings are only accessible to the TourTools Support Team.



The USER SETTINGS are accessible to each TourTools user. These settings allow users to set preferences that impact their TourTools sessions only. Things like setting a color theme for their Dashboard, managing their email signature, setting a default window size, and more.

User Settings

TourTools Settings for Arin Preston

Set Default Window Size

☐ Compress ☒ Tighten ☐ Default ☐ Expand

Set Dashboard Theme

☐ Sand (default) ☒ Ivory ☐ Sky ☐ Melon ☐ Lemon ☐ Lime ☐ Indigo ☐ Blush

Additional Windows to Open at Login

☐ Tasks ☐ Vendor ☐ Packages ☐ Operations ☐ Quickbooks
☐ Client ☐ Tours ☐ Bookings ☐ Money

Mode

☐ Cascade ☒ Minimize

Set Default Task List Date Range at Login

Set the begin date to days prior to today

Set the end date to days after today

Set Default Metrics & KPI Date Range at Login

the default setting is "This Year"

☐ This Month ☒ Last Month ☐ This Year

Adjust Email Signature

Arin Preston
 Globe Tour & Travel
 (330) 333-0120 Mobile
 www.GlobeTours.com

Dashboard Metrics

☐ Disable and show System Modules instead

Default Window Size

If you use a small laptop to access TourTools v5, you might consider the "Tighten" or "Compress" setting here. If you have a larger screen, the default setting or "Expand" might provide a better experience.

Dashboard Theme

Add a splash of color to your Dashboard to change things up a little and personalize the application to suit your own taste or mood on a given day!

Additional Windows & Mode

Although there are NEW WINDOW buttons throughout the TourTools v5 application, you may find yourself

opening the same 4 windows every day to suit your working style. This setting allows you to have those windows auto-open every day when you log in – saving you a little time.

The MODE setting is related to this – it allows you to specify if these additional windows should open in a cascading fashion or if they should open and then minimize (like they did in TourTools v3).

Task List Date Range

Tired of resetting the date range of your Dashboard Task List to suit your preference every day when you log in? Maybe the default date range is not ideal for you. Use this setting to set a new default date range.

Metrics & KPIs

Tired of resetting the date range of your Dashboard Metrics to suit your preference every day when you log in? Maybe the default date range is not ideal for you. Use this setting to set a new default date range.

You can also disable the Dashboard Metrics and alternatively display the System Modules (as they were in TourTools v3/v4).

Email Signature

This is a quick way for users to update their email signature information. This is the signature that gets pulled into emails when they are sent out of TourTools.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Business Settings

Clicking on the large Module Navigation button labeled “Settings” at the top right of the screen allows access to various settings for the TourTools system. All can access User Settings; Business and System Settings are available to Owners and Managers only; Developer Settings are only accessible to the TourTools Support Team.



The BUSINESS SETTINGS are meant for the Owner and Managers. This is where TourTools defaults and system-wide settings and values can be set and managed. This is also where the Division and Staff databases are maintained.

Business Settings

Company / Divisions | Staff Members | System Modules | eBlast Templates | DB Announcements | Guides | Insurance Tables | TourTools Event Log | TourTools Online

Company & Division Info

TourTools v5 | Legacy | Auto Set Division 1 X

+ Division

Company Name	Code	Division #	Website	Address	Email	City	State/Province	Zip/Postal Code	Country	Phone	Toll Free	Fax	Logo
Globe Tour & Travel	GTT	1	www.GlobeTours.com	7789 West 42nd Street	info@globetours.com	Colorado Springs	CO	88756	USA	303-555-6856	800-548-7744	303-555-6866	
Elite Adventures	EAD	2	www.EliteAdventures.com	7789 West 42nd Street	info@eliteadventures.com	Colorado Springs	CO	88756	USA	303-633-5464	888-542-2300	303-633-5454	

Company / Division

Many TourTools clients have multiple divisions or brands under which they sell tours. This is where those details are managed. The logos and company information specified here will pipe out to reports and documents generated for Tours and Bookings associated with a specific division. Check the box labeled “Auto Set Division 1” if you only have 1 division. If you have more than 1 division, remember to set the appropriate division on each Tour you create. As long as the division is properly set in the Tour record, it will automatically be set for all Packages and Bookings associated with that Tour.

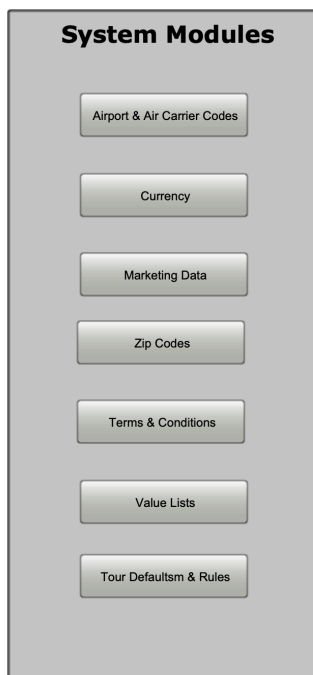
For those who need to set more than 1 division for certain Tours, you can do so. But, in this case, the

Package and each Booking will have to be set manually as they are created to indicate which division it should be associated with.

Staff Members

This is where all of your staff data is managed. When you hire a new person, be sure to add them here (or remove them when they leave). This is an important step in the new user/workstation setup process. TourTools will not function properly for a new staff member if they are not represented here.

System Modules



For those who have used previous versions of TourTools, you will recognize these system modules – they use to be called Support Files. These modules provide access to many areas of the system and allow managers to set up defaults and manage system-wide data.

Airport & Air Carrier Codes

These come pre-loaded with your TourTools v5 system. You can add/remove and modify values as needed. These are used in the Tours and Bookings modules for managing flight itineraries.

Currency

Create a new currency record by clicking on the “+ New” button and identify the currency with the universally accepted three-character code. Note there is a field where you can load the URL of your favorite currency exchange website, which can be accessed by clicking on the “Open” button.

EXCHANGE RATES AND ESTIMATES

Currency

CAD

Enter Exchange Rates

1\$ USD will buy

1.26322

CAD

1 CAD will cost

.79162

USD (Payments)

1 CAD =

.85

USD (Costing)

Calculated Estimates

1\$ USD =

1.2632323589601071

CAD

1 CAD =

.7916277449692057

USD (Payments)

URLS for Currency Converters

Open

<https://www.oanda.com/currency/converter/>

Post Update Note

Complete the record by filling in the first field, highlighted in this example at the top, in yellow. This amount represents what one US Dollar will *purchase* in the foreign currency. Once that field is loaded, the corresponding yellow-highlighted field below will auto-fill with the “inverse” value of the currency, or, what one currency unit will *cost* in US Dollars. Take that number — rounded if you wish — and load it in the field highlighted here in blue at the top of the screen. That is the exchange rate that will be in effect were you to make a payment from Ops. The inverse of *that* amount will auto-load to the blue highlighted field below.

The last — and most important — field to complete is the one highlighted in red, labeled “Costing.” As you build a Package using services from the Vendor in question, this amount is what will be used to convert/calculate the cost. **Since many tours are costed a year or more in advance of their actual operation, you will probably want to allow some “wiggle room” to allow for fluctuation in the exchange rate.** In this scenario, the exchange rate could change by more than five cents in the Vendor’s favor before the costing of the trip would be negatively affected. Conversely, if the exchange rate improves by the time we have to pay the Vendor, the profit margin on the Package increases.

When all of your input is complete, use the “Post Update Note” field to load some reference of who last updated the rate — perhaps their initials — and on what date.

More specifics on currency exchanges as they relate to costing tours and making payments are covered in the Package and Ops chapters.

*The importance of properly identifying the currency in which the supplier will be paid cannot be overstated. If it is mis-identified and the currency mis-valued, there will be cascading effects that could negatively

impact your pricing and profitability.

If an incorrect currency is associated with a Vendor record at this level and goes undetected to the point that Operations records have been created, there is no “fix” other than to strip the incorrect Price/Inventory record from each affected Package, and then delete the Contracted Service record from the Vendor record. Only then can you reassign the currency associated with the Vendor and start building your Contracted Service records, Packages, etc., all over again (all of this will be explained further as we move along).*

Marketing Data

This module is used to identify your marketing campaigns and then associate various Clients and Bookings with them. It allows a high level of analysis on how your marketing dollars are spent and which campaigns are most effective.

Zip Codes

You will most likely never need to access this database of zip codes. It is used to identify and auto-fill the cities and states as you enter the zip codes for Clients and Vendors.

Terms & Conditions

This is where the default text for your Terms & Conditions are set. These can be pulled into Packages on the Terms & Conditions tab. We suggest that you add as much verbiage here (for as many scenarios as possible) and then delete out what doesn't apply as the text is pulled into a package.

Value Lists

This allows Owners and Managers access to update value lists that populate in various parts of the system.

Tour Defaults & Rules

This is where you will set the default values for primary fields that will be added to every new Tour record. These values are entered as soon as you set a departure date for the Tour.

eBlast Templates

Manage your Client and Vendor eBlast templates on this tab. These can be used in recurring email campaigns. Your eBlast templates can include multiple attachments.

DB Announcements

There are 2 areas of the Dashboard set aside for announcements. Enter details on this tab and choose whether to highlight the information or not. All logged in users will see these announcements in real-time.

Guides

If you have regular guides that you use on your Tours, you can manage them here – much like an external staff database. Guides can be assigned to specific Tours and reports can be run to determine usage and availability.

Insurance Tables

If you are selling insurance within TourTools, manage the data tables on this tab. Contact the TourTools team if this is something you are interested in exploring.

TourTools Event Log

This event log will allow you to audit critical activity in your system and identify the user that performed the action and the date it occurred.

TourTools Online

This tab allows you to manage certain settings and default text for TourTools Online, if you have it as an add-on to your back office system.

Business Settings

Company / Divisions	Staff Members	System Modules	eBlast Templates	DB Announcements	Guides	Insurance Tables	TourTools Event Log	TourTools Online	Email & Task Automation
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TourTools Online Options & Settings

The following options can be managed from here and instantly implemented on the web in TourTools Online. The default setting is specified in parentheses.

<p><u>USERS</u></p> <p><input type="checkbox"/> Display Past Bookings (off)</p> <p><input checked="" type="checkbox"/> Display Past Bookings Status (off)</p> <p><input checked="" type="checkbox"/> Hide Cxld Bookings (off)</p>	<p><u>EMAILS</u></p> <p><input checked="" type="checkbox"/> Use Company Name as Sender (on)</p> <p><input type="checkbox"/> CC Tour Planner on Conf Emails (on)</p> <p><input checked="" type="checkbox"/> CC Res Agent on Conf Emails (on)</p>
--	--

Password Reset Help Text

Enter text below to be displayed on the "Recover Password" page.

Please call us at (800) 555-5555 if you have any trouble resetting your password.

Booking Confirmation Text

Enter text below to be displayed on the "Reservation Complete" page (and in the confirmation email) once the booking is completed.

Thank you for booking with Globe Travel. You will receive a confirmation email momentarily. Please call us at (800) 555-5555 if you have any questions.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

System Settings

Clicking on the large Module Navigation button labeled “Settings” at the top right of the screen allows access to various settings for the TourTools system. All can access User Settings; Business and System Settings are available to Owners and Managers only; Developer Settings are only accessible to the TourTools Support Team.



The SYSTEM SETTINGS are meant for your IT staff or consultants. If you do not have IT support, the TourTools team can help you manage these more technical settings for your TourTools v5 system.

Email & Integrations

The screenshot displays the 'System Settings' interface. At the top, there's a header 'System Settings'. Below it, a navigation bar contains three tabs: 'Email & Integrations' (selected), 'Payment Gateways', and 'System Access Log'. Under 'Email & Integrations', there are four sub-tabs: 'Email SMTP' (selected), 'MailChimp', 'Google Maps', and 'DocuSign'. The 'Email SMTP' tab shows the 'System Email Configuration' form with the following fields:

- Host:
- Port:
- SSL: ☒
- Username:
- Password:
- From Address:

The SMTP email account settings are accessible to your management and IT staff on the **Email SMTP** tab. In previous versions, clients had to open a support ticket to update their SMTP passwords when they changed; in v5, you can make changes to these settings without our assistance.

Other integrations and their configurations are managed here, as well, like the **MailChimp** and **Google Maps**.

TourTools v5 supports **DocuSign** and those credentials and settings are managed in this area, as well. This add-on feature provides the ability to send DocuSign documents (proposals, terms and conditions, etc.) from TourTools and can be configured to fit customized workflows, as well. Based on parameters you provide, TourTools can trigger DocuSign to send specified documents to all passengers on a particular Tour

and log responses/notifications as signed documents are submitted.

Payment Gateways

The screenshot shows the 'System Settings' interface with the 'Payment Gateways' tab selected. Under 'Active Payment Provider is', 'TranSafe' is selected. Below this, there are tabs for 'TourTools TranSafe', 'Authorize.net', 'PayPal PayFlow', 'Elavon Converge', and 'Stripe'. The 'TourTools TranSafe Gateway Configuration' section is active, showing fields for 'User Name' (test_retail:public), 'Password' (pub1ct3st), and 'URL' (https://test.transafe.com). A 'NOTE' section lists mandatory fields for processing: Amount, Card Number, Expiration Date, CV Code, and Zip Code. There are 'On' and 'Off' toggle buttons in the top right of the configuration area.

This is where your payment gateway configuration is managed. In previous versions, clients had to open a support ticket to update these details; in v5, you can make changes to these settings without our assistance if you have IT staff or consultants. By default, TourTools supports the following gateways: TourTools/TranSafe, Authorize.net, Elavon Converge, PayPal Payflow Pro, and Stripe.

System Access Log

The screenshot shows the 'System Settings' interface with the 'System Access Log' tab selected. The table displays login and logout information for various users. A 'System Access Log' title is at the top left, and an 'Open Access Log' button is at the top right. The table has columns for Login Date and Time, Account, Username, Platform, Last Layout, and Logout Date and Time.

Login Date and Time	Account	Username	Platform	Last Layout	Logout Date and Time
9/11/2022 11:09:15 PM	Arin	Marcie Vargo	1		
9/11/2022 11:15:37 PM	Arin	Arin Preston	1		
9/11/2022 11:37:05 PM	Arin	Arin Preston	1		
9/12/2022 3:23:32 PM	Developer	Developer	-2		
9/12/2022 3:25:39 PM	Arin	Arin Preston	1		
9/12/2022 8:42:22 PM	Developer	Developer	-2		
9/12/2022 4:51:21 PM	Arin	Arin Preston	1		
9/14/2022 11:48:58 AM	developer	developer	1		
9/15/2022 3:59:35 PM	developer	Mike	-2		
9/15/2022 7:38:50 PM	developer	Mike	-2		
9/16/2022 11:37:51 AM	developer	Mike	-2		
9/17/2022 5:00:16 PM	Developer	SAM	-2		
9/17/2022 5:02:11 PM	Developer	SAM	-2		

The system access log is a quick way to identify login activity in the TourTools v5 application.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

New Enhanced Email Module

We are pleased to introduce the new **Enhanced Email Module** – it will supercharge your Client and Vendor communication workflows. You can use templates to optimize recurring marketing and notification campaigns and save time & money. Add multiple attachments with the option to save them in the related Client/Vendor/Tour email log.

TourTools can send campaigns to **found sets** of Clients and Vendors, or to all Vendors/Passengers on a given Tour. Your sent emails will also show up in the SENT folder in the email application you use outside of TourTools

! TourTools does not RECEIVE reply emails. If you want to track replies, those will need to be manually added into the notes section for a given Client or Vendor.

SMTP Settings in TourTools (for IT staff)

All emails sent out of TourTools are sent from a single email address selected by the management team. Typically, this is an address like “info@globetours.com” or “admin@abctravel.com”. The SMTP settings are configured with the credentials for this primary email account.

The screenshot displays the TourTools interface with a dark navigation bar at the top containing icons for Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. Below this is a light green header for 'System Settings'. Underneath, there are three tabs: 'Email & Integrations' (selected), 'Payment Gateways', and 'System Access Log'. Within the 'Email & Integrations' tab, there are four sub-tabs: 'Email SMTP' (selected), 'MailChimp', 'Google Maps', and 'DocuSign'. The 'Email SMTP' sub-tab shows the 'System Email Configuration' form with the following fields:

- Host:
- Port:
- SSL: ☒
- Username:
- Password:
- From Address:

Review Your Email Signature in User Settings

When a staff member sends an email, it will add their personalized email signature to the body of the email (signatures are managed in **Settings > User Settings**, see below for details) and the REPLY-TO email address will be set to their email address as entered in their Staff record (managed in **Settings > Business Settings > Staff Members**).

Business Settings

Company / Divisions **Staff Members** System Modules eBlast Templates DB Announcements Guides Insurance Tables TourTools Event Log TourTools Online

Staff Members + Add Staff Member

First Name	Last Name	Title	Email Address	Phone - Office	Ext	Phone - Cell
Arin	Preston		arin@datavast.net			

The USER SETTINGS are accessible to every TourTools user, regardless of their level of access or which login account they use. These settings allow users to set preferences that impact their TourTools sessions only. Things like setting a color theme for their Dashboard, managing their email signature, setting a default window size, and more.

User Settings

TourTools Settings for Arin Preston

Set Default Window Size

☐ Compress ☒ Tighten ☐ Default ☐ Expand

Set Dashboard Theme

☐ Sand (default) ☒ Ivory ☐ Sky ☐ Melon ☐ Lemon ☐ Lime ☐ Indigo ☐ Blush

Additional Windows to Open at Login

☐ Tasks ☐ Vendor ☐ Packages ☐ Operations ☐ Quickbooks
☐ Client ☐ Tours ☐ Bookings ☐ Money

Mode

☐ Cascade ☒ Minimize

Set Default Task List Date Range at Login

Set the begin date to days prior to today
Set the end date to days after today

Set Default Metrics & KPI Date Range at Login

the default setting is "This Year"

☐ This Month ☒ Last Month ☐ This Year

Adjust Email Signature

Arin Preston
Globe Tour & Travel
(330) 333-0120 Mobile
www.GlobeTours.com

Dashboard Metrics

☐ Disable and show System Modules instead

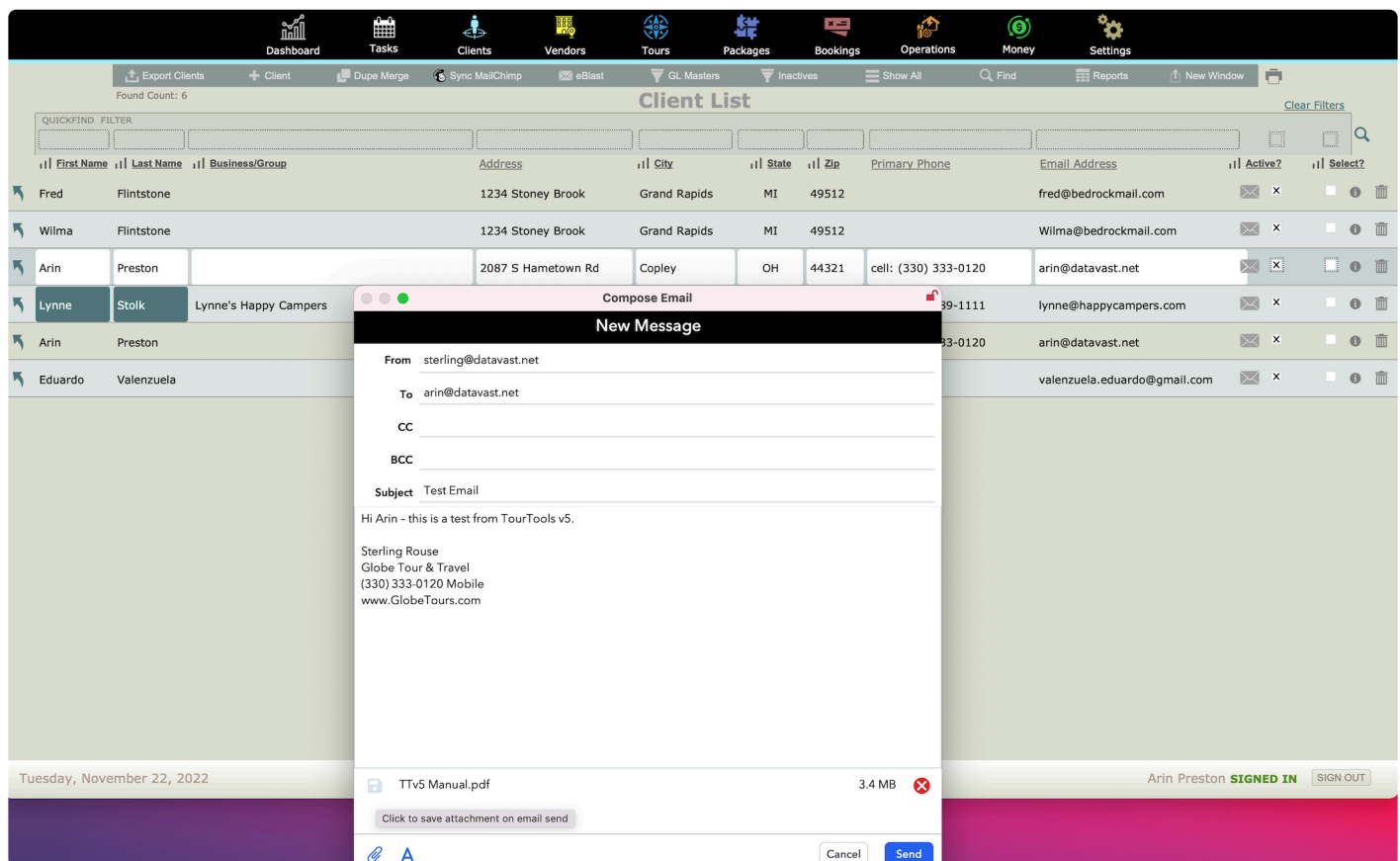
If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Sending Single Emails to Clients & Vendors

Sending a Single Email to a Client or Vendor Contact

To send a single email to a Client or Vendor contact, click on the envelope icon to the right of that contact's email address. An email message window will appear and your email signature will be added to the body of the email. Add any email addresses you'd like to CC or BCC, enter a subject line, add content to the body of the email, and attach any documents or images (up to 10MB). If you'd like to save the attachments to the email log for that Client or Vendor, to be able to open/review them at a later date, click on the DISK ICON (just to the left of your attachment) and it will turn dark, indicating that it will be stored in the Client/Vendor record. Click the CANCEL button to cancel sending of the email; click the SEND button when you are ready to send it.



The process is exactly the same in the Vendor Module. For both Clients and Vendors, you will see an **Email Log** tab in the Detail View – this is where you can review email activity for that particular Client/Vendor. If you elected to SAVE your attachments, they will be accessible from this area for you to open and review at any time.

Active x

GL MASTER

Primary Contact

★

DETAILS

Title

First Name

Last Name

Business/School/Group

Business Title

Primary Email Address

Preferred Contact Method

Mailing Address

Client Categories

Home #

Cell #

Work #

Primary #

Home Address

☐ Home
☐ Business
☐ Don't Mail

☐ Group Leader
☐ Decision Maker
☐ Individual Traveler
☐ Other
☐ Payer
☐ Tour Operator

RELATED CLIENTS

+ Add Related

CRITICAL NOTES

Important notes that should be visible at all times.

First Traveled

Last Traveled

Notes / Activity

Business / Group

Marketing

Bookings / Proposals

Email Log

Tasks / Docs

Reports

EMAIL LOG

Subject	Sent To	Body Preview (hover to view full preview content)	Time	Attachments
Reminder	arin@datavast.net	Test Reminder	11/3/2022 10:12:45 AM	
Test Email	arin@datavast.net	Hi Arin - this is a test from TourTools v5.	11/22/2022 6:49:52 PM	

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

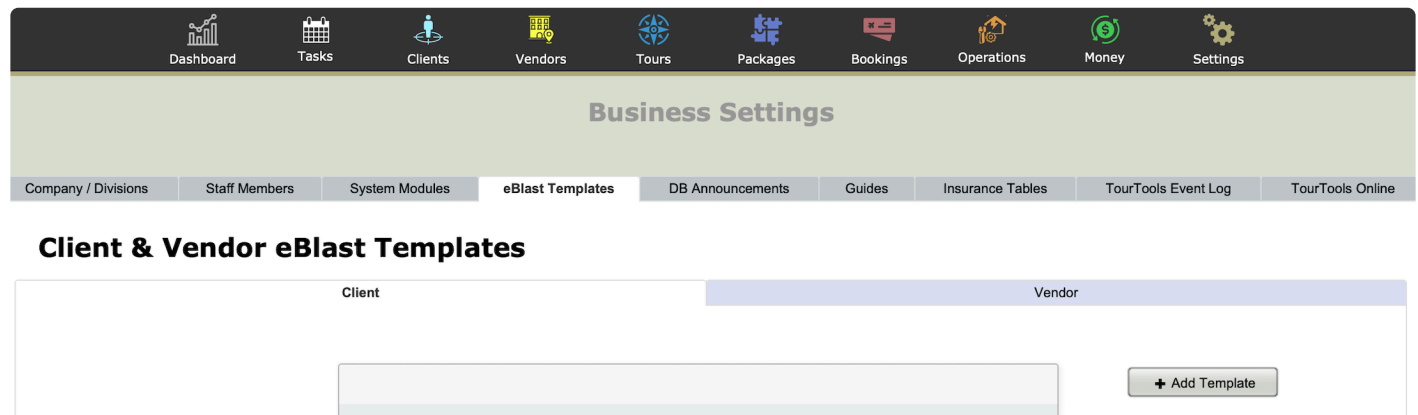
Last modified: March 27, 2023

Sending eBlasts to Client & Vendor Groups

Creating Client and Vendor eBlast Templates

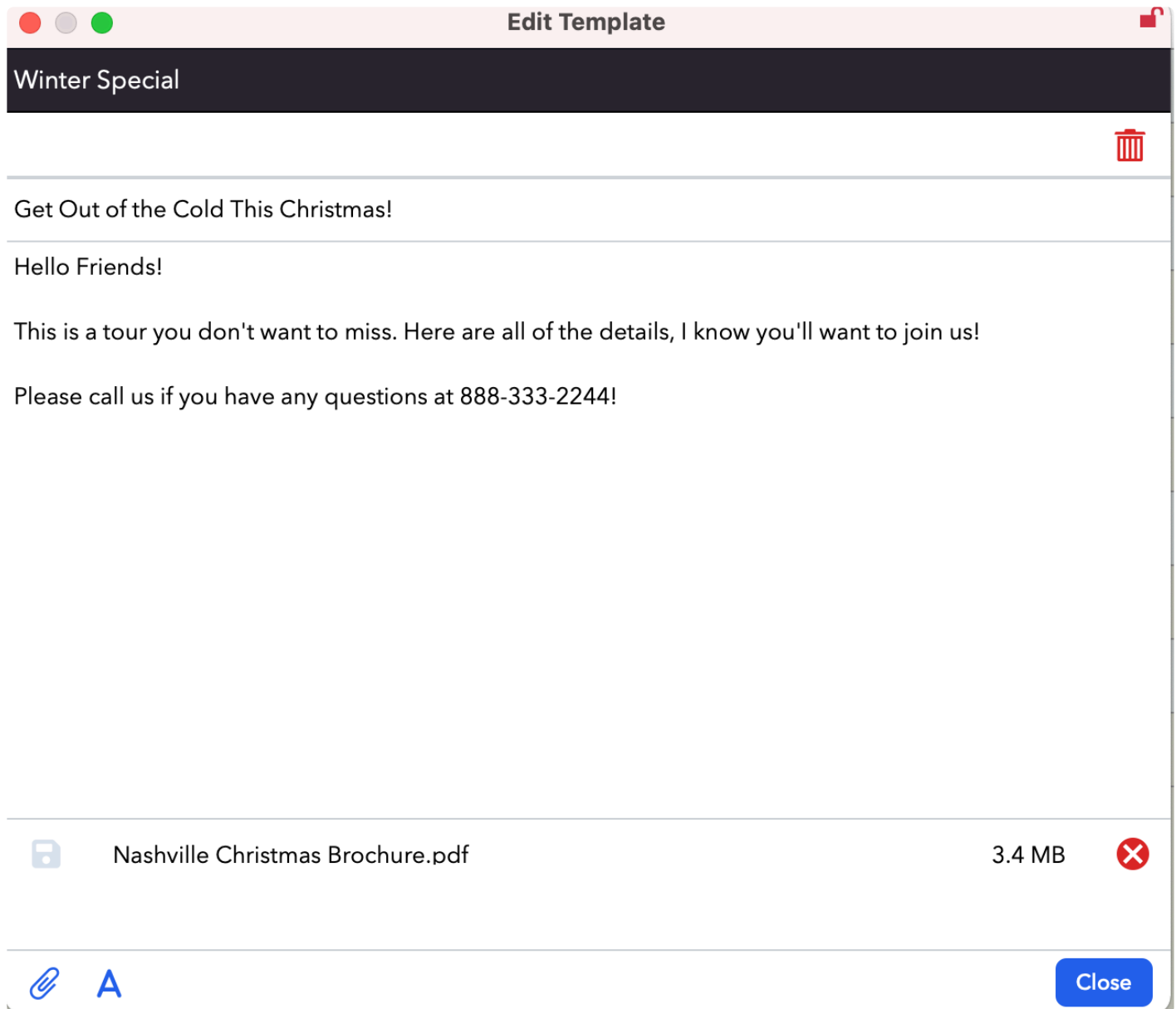
To create and manage eBlast Templates, navigate to **Settings > Business Settings > eBlast Templates**. Your Vendor and Client templates are stored on separate tabs for more efficient management. Click on the **+ Add Template** button at the top right corner.

You can also create a new eBlast template as you are building an eBlast (look for the **New Template** button in the 2nd step of the process).



Next, create your template. Keep in mind that this is just the default text; your staff will be able to add/delete comments to specific recipients on-the-fly as an eBlast campaign is prepared for sending. You can add attachments here and they will be included any time the template is used (again, they can be deleted from specific emails if needed).

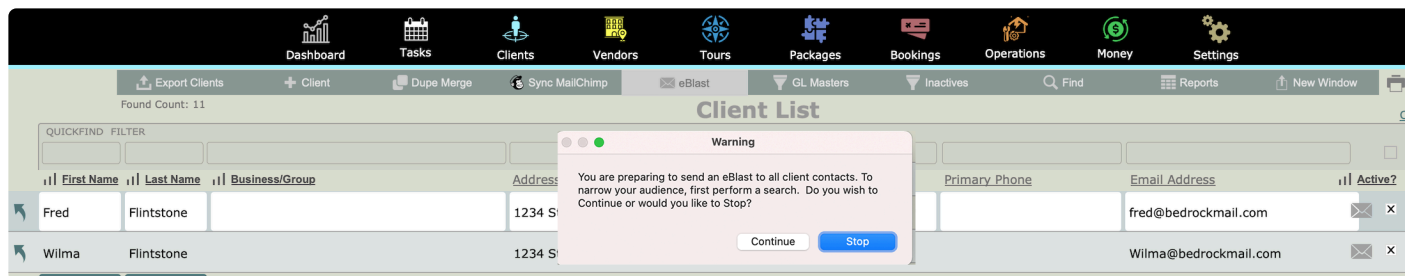
Once your template is complete, click the CLOSE button.



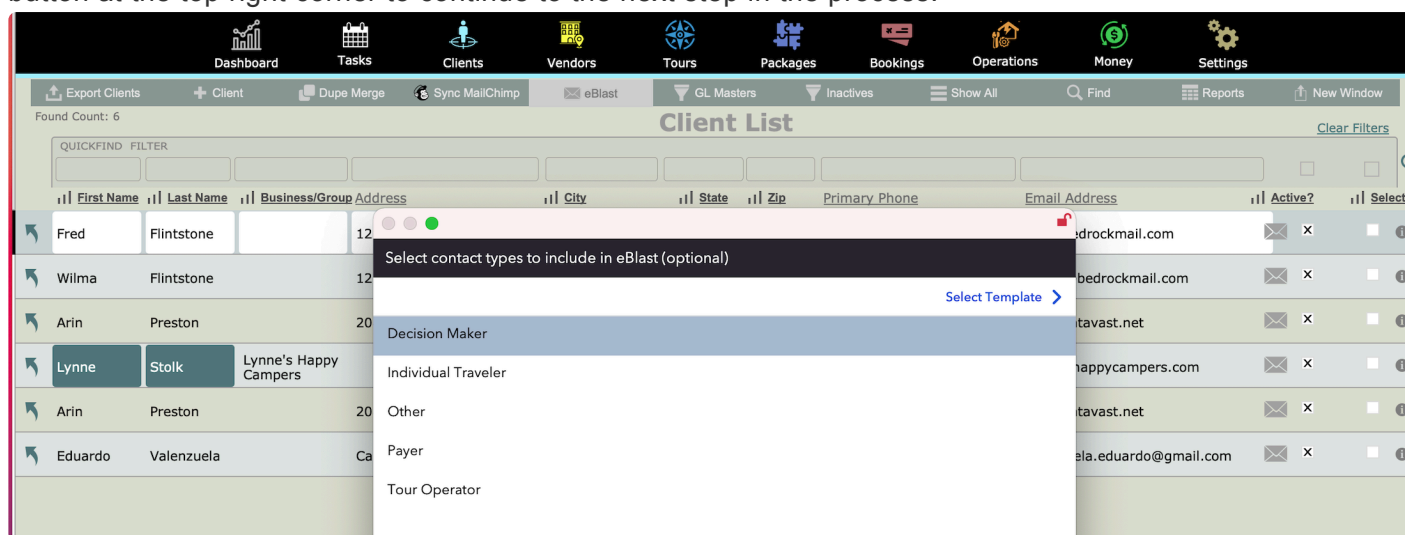
Creating an eBlast to Clients/Vendors

The eBlast process in Client and Vendor are nearly identical so the directions for both will be found in this section. Whether you are in the Client Module or the Vendor Module, the first step in the eBlast process is to create a **found set** – the group of Clients/Vendors to whom you want to send an email. This set might be passengers on a specific tour, Vendors in a certain state, or Clients interested in a particular destination.

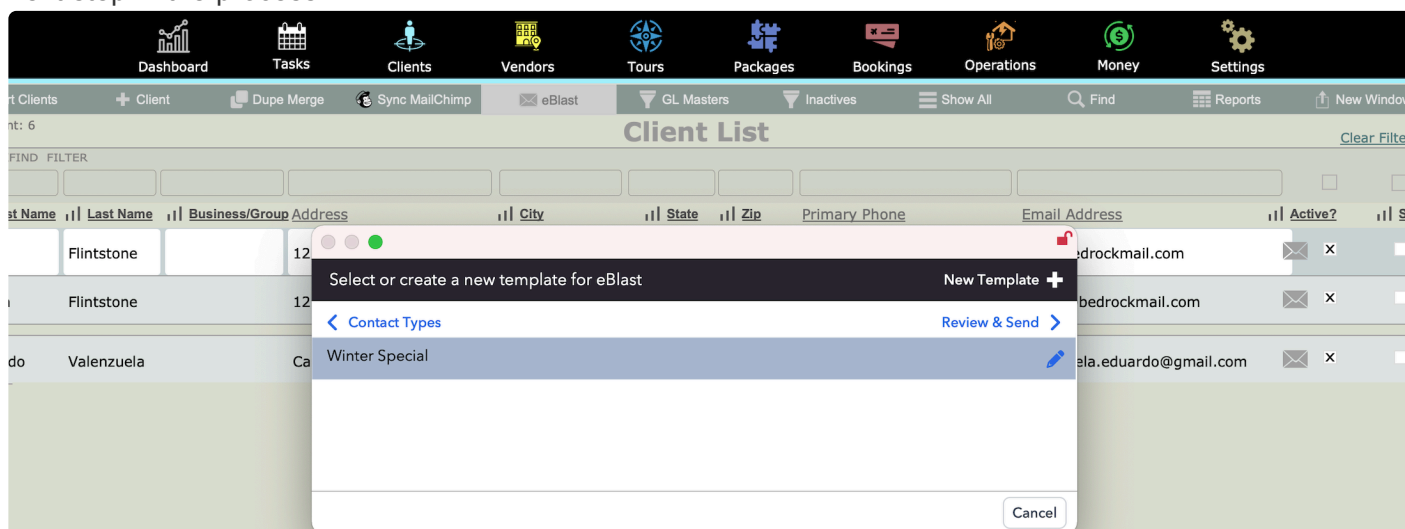
When you click the eBlast button at the top of the Client or Vendor List View, in the **Feature Buttons** bar, a message will remind you to first assemble your found set.



Next, click to highlight the contact types you want to include in the eBlast; then click the **Select Template** button at the top right corner to continue to the next step in the process.

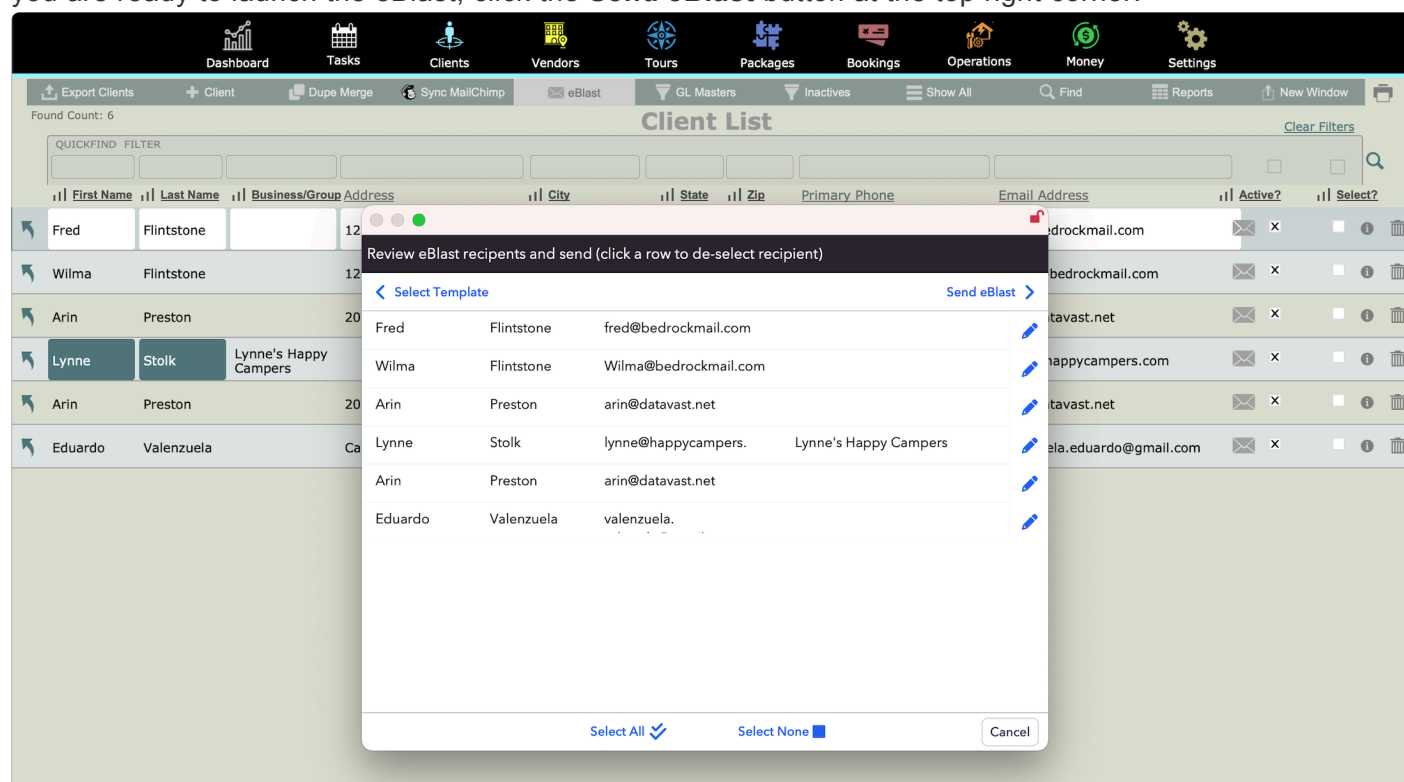


Next, click to highlight the template you would like to use in the eBlast (you can also click the **New Template** button to create one on-the-fly). The pencil button to the far right can be used to view and edit the template as needed. When ready, click the **Review & Send** button at the top right corner to continue to the next step in the process.

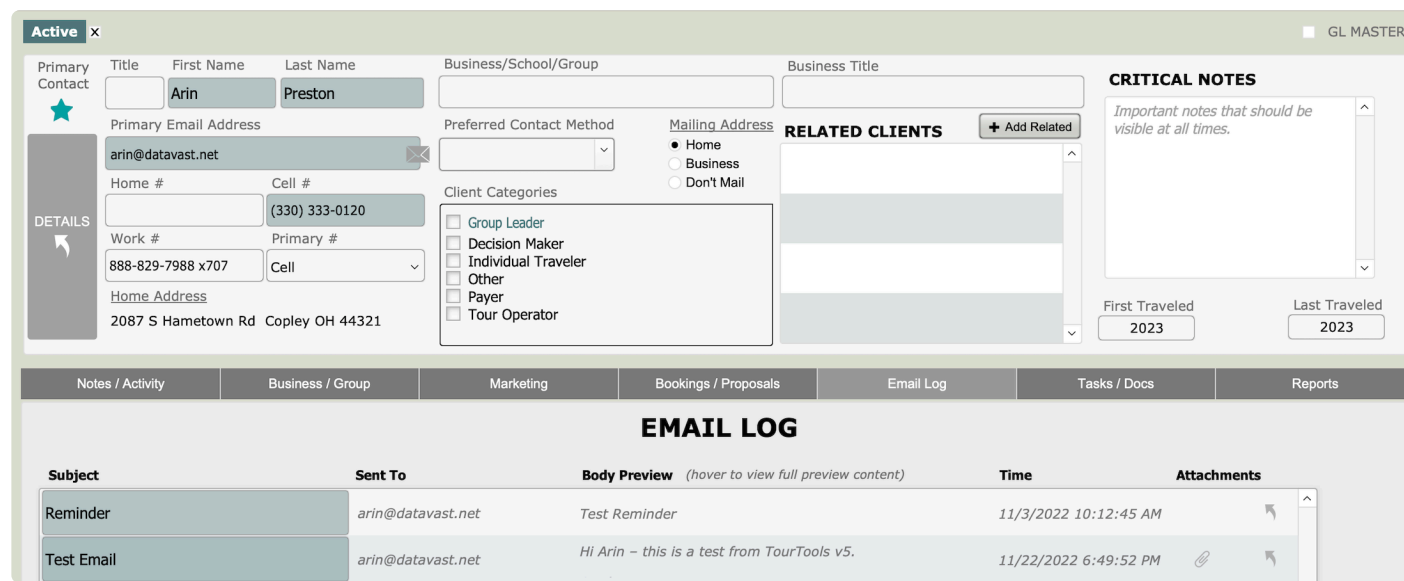


In this final step, click to highlight the contact types you want to include in the eBlast; then click the **SELECT TEMPLATE** (or **NEW TEMPLATE**) button at the top right corner to continue to the next step in the process. The pencil button to the far right can be used to view and edit the each individual email as needed; text can

be added or removed, attachments added, etc. and if you click on an email it turns gray, indicating it will be removed from the campaign and not receive the email. Click on it again to re-add it to the campaign. When you are ready to launch the eBlast, click the **Send eBlast** button at the top right corner.



An email log entry will be made in every Client or Vendor record that was included in the eBlast; the log entry will contain all related content (and attachments, if you chose to save them; if you chose NOT to save them you will simply see a paperclip icon indicating attachments were present and the files names will be logged).



If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Sending eBlasts in the Tours Module

Creating an eBlast to Tour Vendors and/or Passengers

The eBlast process in the Tours Module functions a bit differently than it does in the Client and Vendor Modules. The eBlast button is not on the List View, it's on the Detail View in Tours. The reason for this is that the eBlast is specific to one Tour only. When you click the eBlast button, you will see a drop down menu with additional options; you can send an eBlast to (1) All Tour Pax, (2) All Tour Vendors, or (3) Just Tour Hotel Vendors

The screenshot shows the 'Tours' module detail view for the tour 'EXPGR06252023 - Explore Grand Rapids'. The 'Send eBlast' button is highlighted with a red box, and its dropdown menu is open, showing three options: 'Tour PAX', 'Tour Vendors', and 'Tour Hotels'. The tour details include: Tour Code: EXPGR06252023, Name: Explore Grand Rapids, Start Date: 06/25/23, Days: 6, End Date: 06/30/23, Nights: 5, Tour Status: Active, Res Status: Avail, Default Bus Size: 47. The tour type is 'Historical Tours' and the destination is 'Grand Rapids'.

If you select **Tour PAX**, the eBlast process will be similar to what you are familiar with in the Client Module. You will be asked to select or create a Client Template, then presented with the individual emails that are about to be sent so that you can adjust as needed, then click **Send eBlast** to launch the eBlast. The emails will be logged in the related Client records and one entry will be made in the Tour record on the **Email Log** tab, indicating that an **All PAX eBlast** was sent on that date with content and details specified.

The screenshot shows the 'Active' client record for 'Arin Preston'. The 'Email Log' tab is selected, displaying a table of email logs. The table has columns for Subject, Sent To, Body Preview, Time, and Attachments. Two entries are shown: a 'Reminder' sent to arin@datavast.net on 11/3/2022 at 10:12:45 AM, and a 'Test Email' sent to arin@datavast.net on 11/22/2022 at 6:49:52 PM. The client details include: Title: Arin, First Name: Preston, Last Name: Preston, Business/School/Group: Creston High School, Business Title: Creston High School, Primary Email Address: arin@datavast.net, Home #: 888-829-7988, Cell #: (330) 333-0120, Work #: 888-829-7988, Primary #: 888-829-7988, Home Address: 2087 S Hametown Rd, Copley OH 44321. The client categories include: Group Leader, Decision Maker, Individual Traveler, Other, Payer, and Tour Operator.

Subject	Sent To	Body Preview	Time	Attachments
Reminder	arin@datavast.net	Test Reminder	11/3/2022 10:12:45 AM	
Test Email	arin@datavast.net	Hi Arin - this is a test from TourTools v5.	11/22/2022 6:49:52 PM	

If you select **Tour Vendors**, the eBlast process will be similar to what you are familiar with in the Vendor Module. You will be asked to select the contact type (e.g. – Billing, Onsite, etc.), next to select or create a

Vendor Template, then presented with the individual emails that are about to be sent so that you can adjust as needed. The final step is to click **Send eBlast** to launch the eBlast. The emails will be logged in the related Vendor/Operations records and one entry will be made in the Tour record on the **Email Log** tab, indicating that an **All Vendors eBlast** was sent on that date with content and details specified.

If you select **Tour Hotels**, the eBlast process will be the same as above but only the hotel Vendors will be included.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Sending Emails in the Packages Module

Email Functionality in the Packages Module

Email functionality has been added to the Packages Module to allow for quick communication with Vendors as Tours are being built and operated. It saves the step of navigating to the Vendor Module to send an email to a hotel or attraction.

The process here should be familiar by now, it is very similar to the process in other modules and follows the same steps.

Vendors can be email quickly from the **Main / Itinerary** tab or the **Add Products/Services** tab.

The screenshot shows the 'Package Details' screen for 'Core Package' (EXPGR06252023). The 'REVIEW/MANAGE ITINERARY' tab is active. A modal window titled 'Select contact types to include in eBlast (optional)' is open, listing various contact types: Onsite, Accounting, Group Sales, Marketing, and Sales. A red box highlights the email icon in the bottom right corner of the modal.

The screenshot shows the 'Package Details' screen for 'Core Package' (EXPGR06252023). The 'BUILD ITINERARY' tab is active. A modal window titled 'Select contact types to include in eBlast (optional)' is open, listing various contact types: Onsite, Accounting, Group Sales, Marketing, and Sales. A red box highlights the email icon in the bottom right corner of the modal.

Once emails are sent, you will find details logged in the Vendor and Operations Modules on the **Email Log** tab.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Emailing Charts, Documents, & Reports

Emailing Documents, Lists, and Reports

Every module in TourTools has a **Reports** tab that has pre-built reports, lists, and documents that can be created and output (preview, print, export to PDF or Excel, or email).

The screenshot displays the TourTools Booking Details interface. A modal dialog box titled "Report Options" is open, showing options for a "Rooming List". The background interface includes a top navigation bar with icons for Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. Below this is a "Booking Details" header with a "Record ID 38607". The main content area is divided into sections for "BOOKING / PAX INFO", "TOUR", and "PAX". The "BOOKING" section shows details for "Explore Grand Rapids" with a date booked of 09/01/22 and a status of "CONFIRMED". The "TOUR" section shows the tour name "Explore Grand Rapids" with start and end dates of 06/25/23 and 06/30/23. The "PAX" section lists passengers: Fred Flintstone and Wilma Flintstone. The "Report Options" dialog box has buttons for "Preview", "Print", "Save As PDF", "Browse & Edit", "Email", and "Save As Excel". At the bottom of the dialog is a "Stop / Close Window" button. The background interface also shows a "Lists" section with options for "Rooming List", "Ticket List", and "Cruise Dining List".

Click on the **Email** button to create a PDF of the report and attach it to an email for sending.

Compose Email

New Message

From sterling@datavast.net


To arin@datavast.net

CC


BCC


Subject Rooming List Report

The Rooming List Report is attached.

 Rooming List Report.pdf

113.1 KB



 **A**

Cancel

Send

Emailing Charts from the Dashboard

Charts can be created from the TourTools Dashboard and output (Save as PDF or Email).

The screenshot displays the TourTools v5 interface. The main window shows the 'Expenses vs. Sales' report for the year 2022. The report includes a line graph and a table of data. The graph shows a significant peak in August. The table below provides the following data:

Month	Sales	Expenses
JAN	0	0
FEB	0	0
MAR	0	0
APR	0	0
MAY	0	0
JUN	0	0
JUL	0	0
AUG	20,625	0
SEP	0	5,684
OCT	0	0
NOV	0	0
DEC	0	0

The 'Expenses vs. Sales' window has an 'Options' menu with 'Email' and 'Save As PDF' buttons. A 'Compose Email' window is open, showing the 'New Message' form. The 'Subject' field is 'Expenses vs. Sales' and the 'Body' field is empty. The 'Attachments' section shows 'Expenses vs. Sales.pdf' (68.5 KB). The 'Email' button in the 'Options' menu and the 'Expenses vs. Sales.pdf' attachment are highlighted with red boxes.

Click on the **Email** button to create a PDF of the report and attach it to an email for sending.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Chapter 2: Clients

The Client Module – A Powerful CRM

*The Client module in TourTools stores contact information about your clients—name, address, phone, etc.—proposal history, current and past travel, information requests and other important information; **it is a powerful CRM and marketing tool built right into your TourTools Back Office system.***

The Client module represents, first of all, your mailing list. You will create a record for every person or organization that does business with you. Client is also where your marketing efforts are recorded and is where you will begin the booking process. Over time, the records in Client become a treasure chest of information reflecting the destinations of interest, the brochure request history, and the travel history of each of your clients.



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Client Module – List View

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

Primary Contact Name	Business/Group/Address	City	State	Zip	Primary Phone	Email Address	Active?	Select?
Flintstone, Fred	1234 Stoney Brook	Grand Rapids	MI	49512		lynnestolk@gmail.com	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Flintstone, Wilma	1234 Stoney Brook	Grand Rapids	MI	49512			<input checked="" type="checkbox"/>	<input type="checkbox"/>
Preston, Arin	2087 S Hametown Rd	Copley	OH	44321	cell: (330) 333-0120	arin@datavast.net	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stolk, Lynne	Lynne's Happy Camper						<input checked="" type="checkbox"/>	<input type="checkbox"/>
Stephens, Marquita	Minneapolis Urban League						<input checked="" type="checkbox"/>	<input type="checkbox"/>

Deleting Client Records

Although there is a trash can button (available to owners and managers only) to delete a Client record – it most often makes better sense to instead deactivate (uncheck the **Active** checkbox) rather than delete the record in order that you can maintain the history associated with the person or entity. If you do decide to delete it, you will be “second guessed” as to whether you really want to delete the record and once having answered “yes”, the record will be PERMANENTLY deleted, in other words, **there is no “undo”**, so be careful when you use this function.

Sorting

If you want to view the records in a particular order, you can sort them by clicking on the sort button at the top of any column. Clicking on the sort button again will sort them by that field again, in reverse order.

Dashboard	Tasks	Clients	Vendors	Tours	Packages
Export	+ Vendor	eBlast	Show All		
Found Count: 15					
Vendor List					
QUICKFIND FILTER					
Vendor Name	Address	City	State	Zip	Primary Phone #
↶ Lake Louise Sightseeing Gondola (Sue Cameron)	P.O. Box 5	Lake Louise	AB	T0L 1E0	(403) 522-3555
↶ Sight & Sound Theatres	300 Hartman Bridge Road	Strasburg	PA	17579-0310	(717) 687-4220
↶ Wendella Sightseeing Boats		Chicago	IL	60611	(312) 337-1446
↶ Shoreline Sightseeing - Architecture Cruise (Toni	474 N. Lake Shore Drive	Chicago	IL	60611	(312) 373-7258
↶ Ozark Mountain Sightseeing, Inc. (Ed		Springfield	MO	65804-7210	(417) 334-1850
↶ Wendella Sightseeing		Chicago	IL	60659-7815	(312) 337-1446
↶ Sequoia Sightseeing Tours		Three Rivers	CA	93271	(559) 561-4189
↶ Barefoot Princess Riverboat Sightseeing	P O Box 1759	Myrtle Beach	SC	29598	(843) 272-6796
↶ City Sights, Inc. Not offering step-on guides	369 East 900 South	Salt Lake City	UT	84111	(801) 531-1001
↶ City Sightseeing New Orleans	101 Burgundy Street	New Orleans	LA	70112	(504) 636-1029

If you have a higher-level login, you can also click on the “Records” menu at the top of the screen and then on “Sort Records”. Doing so will open a window listing the fields in use on the layout you are on. Select the one(s) you want to use (such as Last Name), by double clicking on the field name to move it to the right, then click on “sort” and the records will sort in the manner you selected. If you want to re-order the fields on the right, clicking and dragging on the double-arrow symbols to the left of the field name will accomplish that task.

The screenshot shows the FileMaker Pro application window. The menu bar includes FileMaker Pro, File, Edit, View, Insert, Format, Records, Actions, Scripts, Tools, Window, and Help. The 'Records' menu is open, displaying various options. The background shows a table with columns for Vendor Name, Address, and Primary Phone #. The 'Sort Records...' option is highlighted in blue.

Records Menu Options:

- New Record (⌘N)
- Duplicate Record (⌘D)
- Delete Record... (⌘E)
- Delete Found Records...
- Go to Record >
- Refresh Window (⇧⌘R)
- Show All Records (⌘J)
- Show Omitted Only
- Omit Record (⌘T)
- Omit Multiple... (⇧⌘T)
- Modify Last Find (⌘R)
- Saved Finds >
- Sort Records... (⌘S)**
- Unsort
- Replace Field Contents... (⌘=)
- Relookup Field Contents
- Revert Record... (⌘Z)
- Next (⌘↓)

Table Data:

Vendor Name	Address	Primary Phone #
Lake Louise Sightseeing Gondola (Sue Cameron)	P.O. Box 5	(403) 522-3555
Sight & Sound Theatres	300 Hartman Bridge Road	(717) 687-4220
Wendella Sightseeing Boats		(312) 337-1446
Shoreline Sightseeing - Architecture Cruise (Toni)	474 N. Lake Shore Drive	(312) 373-7258
Ozark Mountain Sightseeing, Inc. (Ed)		(417) 334-1850
Wendella Sightseeing		(312) 337-1446
Sequoia Sightseeing Tours	Three Rivers CA 93271	(559) 561-4189

The screenshot shows the 'Vendor List' interface. At the top, there is a 'Feature Bar' with buttons: Export, Vendor, eBlast, Show All, and Find. Below this is a 'QUICKFIND FILTER' section with several input fields. The main table has columns: Vendor Name, Address, City, State, Zip, Primary Phone #, and Vendor Type. A 'Sort Records' dialog box is open in the center. It has a 'Current Layout ("VEN_List_View")' dropdown and a list of fields to sort by: Active, Address 1, City, g_Vendor_Search_rep, Selected, State, Type Service, VendorNamePlusContactName, Zip, VENDOR_Contacts::PhoneWork, and VENDOR_MainContact::EmailAddr... The 'Sort Order' section shows 'State' and 'City' selected with ascending order. There are buttons for 'Clear All', 'Clear', 'Ascending order', 'Descending order', 'Custom order based on value list', 'Reorder based on summary field', 'Override field's language for sort', 'Specify...', and 'Sort'. A checkbox 'Keep records in sorted order' is checked.

Printing



All primary modules have a printer button at the top right of both List View screens and Detail View screens. Click this button to print the data you are currently viewing on the screen.

Feature Buttons

In the thin green/gray button bar we call the **Feature Bar** (just below the Module Navigation bar) at the top of this screen, you will find access to various scripted functionality related to the list.

The Feature Bar contains four buttons: 'Export Clients' (with an export icon), 'Client' (with a plus icon), 'Dupe Merge' (with a merge icon), and 'Sync MailChimp' (with a MailChimp logo icon).

Export Clients

Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

+ Client

Use this button to add a new Client record to your CRM (process described in more detail below).

Dupe Merge

TourTools v5 has a new “Dupe Merge” feature that automatically isolates potential duplicate records (based on criteria that we can customize) and presents them for analysis. The user can then select which records to keep, ignore, and merge so no data is lost in the process of cleaning up duplicate Client records.

Duplicate Merging

Viewing Set 1 of 2

Keep Ignore

Title: Fred First Name: Flintstone Last Name: Business/School/Group: CURRENT BOOKINGS: Explore Grand Rapids Sun 25 Jun 23 BOOKINGS AS GROUP LEADER: PROPOSALS: Fred Explores Grand Rapids Sat 1 Jul 23

Email: fred@bedrockmail.com Job Title: Business Address: Home Address: 1234 Stoney Brook Grand Rapids MI 49512

Home #: Cell #: Work #: Primary #: Business Address: Home Address: 1234 Stoney Brook Grand Rapids MI 49512

Viewing Set 2 of 641

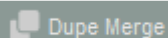
Keep Ignore

Title: Mrs. Wilma First Name: Flintstone Last Name: Business/School/Group: CURRENT BOOKINGS: BOOKINGS AS GROUP LEADER: PROPOSALS:

Email: Job Title: Business Address: Home Address: 1234 Stoney Brook Grand Rapids MI 49512

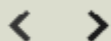
Home #: Cell #: Work #: Primary #: Business Address: Home Address: 1234 Stoney Brook Grand Rapids MI 49512

Print Ignore Set Merge



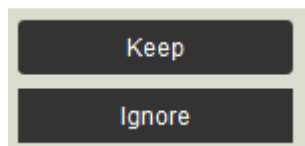
From the Client List, click the “Dupe Merg” button.

Sets of duplicated Clients will be shown, one set at a time. A Client is considered a duplicate if the Last Name, Street Address and Zip code match another client.

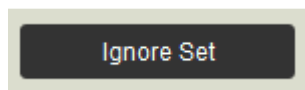


Viewing Set 2 of 641

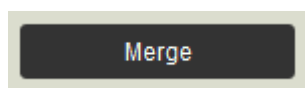
Clicking the Arrow icons at the top left will move through the sets. The set currently being viewed and total number of sets are displayed next to the arrow buttons.



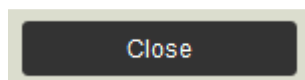
Pressing the Keep button will mark that client to be kept. If you decide to keep a different client in the set, click Keep on that record and it will be marked to keep, but the other Client records in the set will no longer be marked to keep. Only one record can be kept from each set. However, you can use the ignore button so that the client record is no longer treated as a duplicate, and will not be merged or deleted.



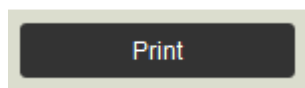
Pressing Ignore Set button at the bottom of the screen will set all client records in the set to be ignored, meaning none are marked to be deleted or merged.



Pressing the Merge button will Merge all the sets that have a record marked to Keep. Any Client records that are marked as ignore, will not perform any action and will not show up as a duplicate again. Any Client records that are marked Keep, will keep the details of that Client, delete any duplicate clients (that aren't marked as ignore), and move any records related to the kept client (bookings/proposals/payments). User will be returned to the Client list.



The Close button, at the top right of your screen, can be pressed at any time to exit the Duplicate Merging screen. No records will be merged or deleted when pressing the Close button, but any ignored records will take effect. The screen will be closed and any kept selections will be reset.



Clicking the Print button will save a PDF of all the possible duplicate clients to your desktop. The print size is letter, landscape. The file will be named "DuplicateClients.pdf". After a dialog box, the user will be returned to the List Client layout.

Sync MailChimp

If you have the MailChimp sync feature, this button will sync your TourTools CRM with your MailChimp account (if a new contact and email address is added to MailChimp it will be added in TourTools and vice versa). Contact us if you use MailChimp and are interested in this add-on, optional functionality.

eBlast

This button is the gateway to creating an eBlast or marketing campaign to a target set of Clients. A few things to do first – create an eBlast Template, in the Business Setting area of the system, to use in your campaign. Create a found set of Client records based on your campaign criteria. We recommend limiting eBlasts to no more than 250 Clients at a time to avoid issues with your email provider and having your emails flagged as spam. For complete details on using the Client eBlast (and other email functionality in TourTools) see Chapter 11.

GL Masters

This button will bring your **GL Master** records, only, into the List View. Once you've done this, you can click the Show All button to bring all active Client records back into the List View.

Inactives

This button will bring your inactive records, only, into the List View. Once you've done this, the button name will change to "Actives" and you can click it again to toggle back to viewing only your active Client records.



Show All

Eliminates any filters you have on your list and shows all Clients. This button only shows when you are in a found set and NOT viewing all records.

Find

You can search for one or a group of record(s) by clicking on the "Find" button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the "Find" screen. This second option allows you to search using fields that are actually resident in another part of the system.

By example, if you want to assemble the Client records for all passengers confirmed on a specific tour, you would search on the Tour Name and Res Status "Active". Similarly, you could locate the records of anyone having traveled on a tour that has already been archived by using some of the fields in the "Pax History Fields" section. Lastly, when you "find" on the Last Name field on this layout, TourTools will search for that name on both the first and second name fields in Client.

When you are ready to initiate the process, click on the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

Reports

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Client Module – Detail View

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Client.

The screenshot shows the 'Client Details' page for 'Mike Alexander' (Record ID 150496). The interface includes a top navigation bar with icons for Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. Below this is a sub-navigation bar with buttons for List View, Client, Booking, Proposal, Availability, Bookings, Find, and New Window. The main content area is divided into several sections:

- CLIENT INFO:** Mike Alexander
- Select/View Client:** A list of clients including Fred Flintstone, Wilma Flintstone, Mike Alexander (selected), and Arin Preston.
- Active:** A star icon and the word 'Active'.
- Form Fields:**
 - Title, First Name (Mike), Last Name (Alexander)
 - Business/School/Group
 - Business Title
 - Primary Email Address
 - Preferred Contact Method
 - Mailing Address (Home, Business, Don't Mail)
 - Home #, Cell #, Work #, Primary #
 - Home Address (123 street)
 - Client Categories (Group Leader, Decision Maker, Individual Traveler, Other, Payer, Tour Operator)
- RELATED CLIENTS:** A section with an 'Add Related' button.
- CRITICAL NOTES:** A section for notes, with a placeholder text 'Important notes that should be visible at all times.'
- First Traveled:** 2023
- Last Traveled:** 2023
- GL MASTER:** A button in the top right corner.
- Bottom Tabs:** Notes / Activity, Business / Group, Outside Sales / RFQs, Marketing, Bookings / Proposals, Email Log, Tasks / Docs, Reports.

Feature Buttons

This bar contains three buttons: 'List View' (with a hamburger menu icon), '+ Client', and '+ Booking'.

List View

Use this button to return to the Client List View.

+ Client

Use this button to add a new Client record to your CRM (process described in more detail below).

+ Booking

Use this button to begin the booking process for this client (process described in more detail in Chapter 7).

This bar contains three buttons: '+ Proposal', '? Availability', and '< Bookings'.

+ Proposal


Use this button to begin the process of creating a proposal for this client. All proposals should begin in the associated Client record.

? Availability

Use this button to jump to the Tours module and check availability for a particular Tour.

< Bookings

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Bookings module and show all bookings related to this Client.

 Find
  Show All
  New Window

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search using fields that are actually resident in another part of the system. By example, if you want to assemble the Client records for all passengers confirmed on a specific tour, you would search on the Tour Name and Res Status “Active”. Similarly, you could locate the records of anyone having traveled on a tour that has already been archived by using some of the fields in the “Pax History Fields” section. Lastly, when you “find” on the Last Name field on this layout, TourTools™ will search for that name on both the first and second name fields in Client.

CLIENT & PRIMARY CONTACT INFORMATION					BOOKING INFORMATION			
First Name <input type="text"/>	Last Name <input type="text"/>	Sales Representative <input type="text"/>			Tour Name <input type="text"/>	Tour Date <input type="text"/>	Date Entered <input type="text"/>	Tour Code <input type="text"/>
Business/School/Group Name <input type="text"/>					Product <input type="text"/>	# PAX <input type="text"/>	Total Cost <input type="text"/>	Bal Due <input type="text"/>
Address <input type="text"/>					Tot Paid <input type="text"/>			
City <input type="text"/>	St/Prov <input type="text"/>	Zip <input type="text"/>	Country <input type="text"/>	Date Client Added <input type="text"/>	Res Status <input type="text"/>			
Phone Numbers <input type="text"/>		GL Master? <input type="text"/>	Active <input type="text"/>	Source <input type="text"/>				
Last Contact <input type="text"/>	FYT <input type="text"/>	LYT <input type="text"/>						
ALT CONTACT INFORMATION					PAX HISTORY INFORMATION			
First Name <input type="text"/>	First Name <input type="text"/>	Type <input type="checkbox"/> Decision Maker <input type="checkbox"/> Individual Traveler <input type="checkbox"/> Other <input type="checkbox"/> Payer			Tour Name <input type="text"/>	Tour Date <input type="text"/>	Tour Code <input type="text"/>	Description <input type="text"/>
<input type="checkbox"/> Tour Operator					Tour Year <input type="text"/>			
					ACTIVITY INFORMATION			
					Info Requested <input type="text"/>	Destination <input type="text"/>	Request Date <input type="text"/>	Fulfillment Date <input type="text"/>
					Action Type <input type="text"/>	Request Notes / Mailing Name <input type="text"/>	Source <input type="text"/>	Segment <input type="text"/>

Show All

This button only appears if you are in a “found set”; it allows you to bring all records back into the List View.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

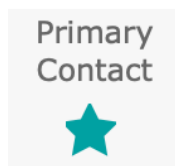
Exploring the Client Details Layout

To keep things simple, we're going to address first of all the information seen on the top half of the Client record. After that, we'll go tab by tab through the bottom section.

The screenshot shows the 'Client Details' form in TourTools. At the top left, there's a tab labeled 'Active' with a close button. The form is divided into several sections. On the left, there's a 'Primary Contact' section with a star icon. The main form area contains fields for: Title, First Name (Lois), Last Name (Peterson), Business/School/Group (American Hospitality), Business Title (Operations Manager), Primary Email Address (tourtoolsusa@gmail.com), Preferred Contact Method (Email), Mailing Address (Home, Business, Don't Mail), Client Categories (Group Leader, Decision Maker, Individual Traveler, Other, Payer, Tour Operator), and a list of Related Clients. On the right, there's a 'CRITICAL NOTES' section with a text area and a 'First Traveled' date field (2012) and a 'Last Traveled' date field (2019).

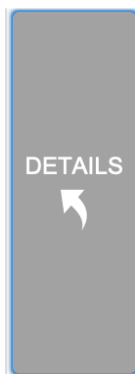
By default, the record will be marked **Active** upon creation; to de-activate it, click on the “Active” checkbox at the top left.

The **GL Master** checkbox is at the top right and can be set and unset from there. For more information about **GL Master** records, jump to [Adding a New Client](#) in the next section.



Click on the **STAR button** if the Client will be the “primary” in a group of related records (e.g. – the father’s record might be marked as “primary” if other family members also have a Client record). If a Client record is set as “primary” the STAR button will turn blue; the record is NOT treated as “primary” when the STAR is gray in color.

Critical Client Information is used to capture just that...information that is critical for you to know about that potential traveler; perhaps that they require a wheelchair, are legally blind, etc.



Click on the large “Details” button to add or edit all other details related to this Client. You will see the popover screen below. Click through all of the tabs to find fields that will store the various details for your Client. The “Performance” tab is for Clients who book musical/performance tours; the “Web” tab contains the login information for that Client if you have TourTools Online added to your TourTools Back Office system.

Contact Details for Lois Peterson

Contact	Addresses	Personal Details	Business / School / Group	Emergency	Passport/Visa	Performance	Loyalty Programs	Web
<div>★</div> <div>Primary Contact</div> <div> <input checked="" type="checkbox"/> Group Leader <input type="checkbox"/> Decision Maker <input checked="" type="checkbox"/> Individual Traveler <input type="checkbox"/> Other <input type="checkbox"/> Payer <input type="checkbox"/> Tour Operator </div> <div>Type Contact</div>	<div> <div>Title</div> <div>First Name</div> <div>Middle Name</div> <div>Last Name</div> <div>Nickname</div> </div> <div> <div>Business Title</div> <div>Preferred Method of Contact:</div> <div>Email Address</div> <div>Work Phone</div> <div>Cell Phone</div> <div>Home Phone</div> <div>Primary Phone</div> <div>Parent Cell Phone</div> <div>Other Phone</div> <div>Other Phone Type</div> </div>							
	<div> <div>Lois</div> <div></div> <div>Peterson</div> <div></div> </div> <div> <div>Operations Manager</div> <div>Email</div> <div>tourtoolsusa@gmail.com</div> <div>(202) 856-9988</div> <div>(202) 896-2525</div> <div></div> <div></div> <div></div> <div></div> <div></div> </div>							

Addresses Tab in Client Details Popover

On the tab labeled **Addresses**, you are able to edit the address associated with the business or school.

Primary Home		Alternate Home	
ALTERNATE HOME ADDRESS			
Street	Apt, Suite		
1234 Sunnyside lane			
City	State/Province		
Phoenix	AZ		
Postal Code	Country		
From Date (e.g. - 3/1)	To Date (e.g. - 5/31)		
11/1/2022	3/15/2022		

In the pane on the right, labeled “Home”, you can reference your contact’s primary address, and—if they are a “snowbird” who winter in Arizona, by example— you can enter the Alternate Address and the dates “from” and “to” that they will be at that address. If a mailing label or a document with an address block is generated during that time frame, the alternate address is the one that will be grabbed.

The information reflected under “Mailing Address” is pretty much self-explanatory. **Note: Marking a record “Don’t Mail” will not prevent the Client record from being picked up in any found set that might be assembled for a mailing, but labels or letters will be missing an address which would prompt them being tossed.**

Preferred Contact Method is a value list choice to reference the preferred method for contacting this Client—home or business phone, e-mail, etc.

To close the Client Details popover, click on the round “x” button at the top right of the popover window to close it and return to the main Client Details screen.

Notes / Activity Tab

On this tab, enter your note in the small text box above the primary Notes field then click one of the buttons above it to indicate the source of the info (e.g. – if the note is related to an email you sent or received, click the email button to add the note). A record will be added to the Activity portal as well, which provides a high-level overview of recent activity with the Client. You will notice that the notes that have been entered are auto-tagged with the date and the user name of the staff member who entered the note. Once a note is entered, it is protected and cannot be modified or deleted.

The screenshot shows the 'Client Details' form for 'Fred Flintstone'. The interface includes a top navigation bar with icons for Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. Below this is a sub-navigation bar with buttons for List View, Client, Booking, Proposal, Availability, Bookings, Find, and New Window. The main header area displays 'Record 1 of 8', 'Client Details', and 'Record ID: 150494'. The 'CLIENT INFO: Fred Flintstone' section is active, showing a list of clients on the left and a detailed form on the right. The form includes fields for Primary Contact, Title, First Name, Last Name, Business/School/Group, Business Title, Primary Email Address, Preferred Contact Method, Mailing Address, Home #, Cell #, Work #, Primary #, Home Address, and Client Categories. The 'RELATED CLIENTS' section lists 'Wilma Flintstone' as an 'Individual Traveler'. The 'CRITICAL NOTES' section is empty. The 'NOTES' section has a text area for composing a new note and buttons for General Note, Call, Email, Fax, Letter, and Meeting. The 'ACTIVITY LOG' section shows a list of activities, including '09/01/22 Booking' and '08/11/22 Email sent by Lynne Stolk'.

Client Details

Record 1 of 8 Record ID: 150494

CLIENT INFO: Fred Flintstone

Select/View Client

- Fred Flintstone
- Wilma Flintstone
- Mike Alexander
- Arin Preston
- Lynne Stolk - Lynne's Happy Campers
- Joseph Fitzgerald
- Josephine Fitzgerald
- Marquita Stephens - Minneapolis Urban League

Active x GL MASTER

Primary Contact

Title: [] First Name: Fred Last Name: Flintstone Business/School/Group: [] Business Title: []

Primary Email Address: lynnestolk@gmail.com Preferred Contact Method: Email Mailing Address: Home Business Don't Mail

Home #: [] Cell #: []

Work #: [] Primary #: []

Home Address: 1234 Stoney Brook Grand Rapids MI 49512

Client Categories

- ☐ Group Leader
- ☐ Decision Maker
- ☒ Individual Traveler
- ☐ Other
- ☐ Payer
- ☐ Tour Operator

RELATED CLIENTS + Add Related

- Wilma Flintstone Individual Traveler

CRITICAL NOTES

Important notes that should be visible at all times.

First Traveled: 2023 Last Traveled: 2023

NOTES

+ General Note + Call + Email + Fax + Letter + Meeting

Compose a new note here, then click the applicable button above. The GENERAL button adds a general note to the client record (below), the specific buttons will add your note below and also add an entry to the activity log to the right.

8/11/2022 Lynne Stolk: Type here to add a general note

ACTIVITY LOG

- 09/01/22 Booking
- 08/11/22 Email sent by Lynne Stolk

Business / Group Tab

If it hasn't already been done, you can designate a client as a travel agent or group leader or associate a client with a travel agent or group leader (explained earlier in the Client Entry section) from this tab.

Linkages that have been associated with the Client will appear at the bottom of the screen.

On the **Group Leader Preferences** subtab, capture the preferences of your group leader as far as things like preferred departure points, whether gratuities are to be provided as part of the tour cost, etc. Click on the “Print GL Prefs” button to produce a paper copy of the information logged.

On the **Agency Management** subtab, you will use the “Join to Agency” button if your contact should be linked to an agency already resident in your system. In their Client record, clicking this button will step you through a “Find” and then presents a “Select” screen. Pick from the list of “hits”, and once you confirm the selection, that agency’s address, phone, etc., details will load to your current record. Before the process is complete, you will want to manually update things like e-mail addresses, private phone numbers or extensions, and similar.

If your contact leaves to join an agency/school not yet resident in your system, update all of the name, address, contact detail, etc., in their record and click on the “Make New Org” button.

Use the “Edit Org” button if there has been some change in the detail loaded for a given agency—change of address, phone, commission level—that you want applied to all records at the same time. Begin in any one of the records, click on the “Edit Org” button, make whatever change is desired, and confirm that you want that change applied to all related records.

Use the “Make Manager” button to designate the Client who is the manager of a given agency. Begin in the record of the agent that you want to appoint manager and click the “Make Manager” button. The pop-up window will give an indication of who is currently designated manager, at which point you can confirm the change or halt the process. Note the field labeled “**Org Manager**”. That is a “yes/no” indicator of whether the record you have open is, indeed, that of the manager.

While all of this functionality can be applied to a school as well as an agency, it’s fairly obvious (also because of the additional fields that are included in the same quadrant) that it’s more geared toward multiple-location travel agencies. In large part, this functionality exists in order that you can track production from a given agency that has multiple locations. If that is not important to your business model, you will want to simply maintain separate Client records for each individual agent or teacher.

Some of the remaining fields are obvious as to their use. The **ARC** and **IATA** number fields are for free-form entry.

Before explaining what you see under “**Commission Rates**”, let’s look at what is going on back in “Business Settings”, where there is a place to load Commission Defaults on the SYSTEM MODULES tab. As can be seen from this screenshot, 5% is set as the default value, 8% as “Top”, and 10% as “Comm 2”.

Commission Defaults

Max list items for Commission Level list in Package; currently first 3 levels are being used in Package and Client

.05	Comm Default	[up to 6 values]
.08	CommTop	
.10	Comm_2	
	Comm_3	
	Comm_4	
	Comm_Low	
	None	

Format - .10 or .05

First value is default and will be used for all packages and options if no other rate is indicated

Second value is top

Third is next lower

6th values is lowest

Fill in as many as you need

You do not need to load "0"

Back in Client, clicking on the button labeled “Defaults/Clear” will load these values (or, conversely, will clear values previously loaded as appropriate).

What you have done in loading these fields is set the stage for commission to be calculated on Booking eventually made from this record (explained further in the Booking chapter).

Defaults/Clear

Commission Rates

Level Top

0.08

Level 2

0.10

Marketing Tab

On this page, you can assign your Client to one or more marketing niches. At some point, checked values might be part of a “find” used to do a mailing or an email blast.

The appearance is different than most, but the choices that appear as check boxes in the various panes come from value lists which are maintained in the “Value Lists” System Module found in Business Settings on the SYSTEM MODULES tab. Only Managers and the Owner can access and modify these value lists.

Active x

GL MASTER

Primary Contact

Title

First Name

Last Name

Business/School/Group

Business Title

Lynne

Stolk

Lynne's Happy Campers

Program Leader

Primary Email Address

Preferred Contact Method

Mailing Address

lynne@happycampers.com

Email

☐ Home
☐ Business
☐ Don't Mail

Home #

Cell #

Work #

Primary #

Home Address

(456) 789-1111

Cell

Client Categories

☒ Group Leader
☐ Decision Maker
☐ Individual Traveler
☐ Other
☐ Payer
☐ Tour Operator

RELATED CLIENTS

+ Add Related

CRITICAL NOTES

This client is a VIP & long-time customer

First Traveled

Last Traveled

2023

2023

Notes / Activity

Business / Group

Outside Sales / RFQs

Marketing

Bookings / Proposals

Email Log

Tasks / Docs

Reports

MARKETING GROUPS

Client's Role

☐ Teacher
☐ Parent
☐ School Staff
☒ Administrator
☐ Travel Agent
☐ Adult Group Leader
☐ Student Traveler
☐ Adult Traveler
☐ Other Role

Group Type

☐ School Group
☐ Youth Group
☐ Plan Outside the School
☐ College Group
☒ Adult Group
☐ Church Group
☐ Family Group
☐ Community Group
☐ International Group
☐ Other Group Type

Interests & Activities

☐ Art & Architecture
☐ Beach
☐ Black History Tour
☐ Business
☐ College Visits
☐ Criminal Justice
☐ Cruise
☐ Eco Tours
☐ Educational
☐ Faith Based
☐ Fashion
☐ Food Tours
☐ Fun
☐ Graduation/Senior Trip
☐ Hawaii
☐ International
☐ Historical Tours
☐ Incentive Trip
☒ Nature/Outdoors
☐ Performance
☐ Resort
☒ Sightseeing
☐ Theatre
☒ Theme Parks
☐ Other Tour Type

Marketing Source Data for Lynne Stolk

Salesperson

Arin Preston

Source

ABA Conference

Segment

Last Contact

2021

8/21/2022

Salesperson: Reference the salesperson to whom the client is credited by selecting from the staff list that presents. Bookings made from the Client record will be tagged with this name and you can get a breakdown of activity attributable to the salesperson by running the Salesperson Totals report in Bookings. **Note: If a salesperson's name is loaded in the Client record when it is linked to a specific Tour Master record, the salesperson will be credited with all of the reservations activity on that tour when you run the P/L**

Report by Salesperson from Tours.

Last Contact will indicate the date on which you last were in contact with the Client.

Source and Segment Fields: Working in tandem, these fields allow you to identify how the client became your client. Generally, the Source is something that is “recurring”, and the Segment more finely defines it.

Marketing Source Data for Lynne Stolk

Salesperson

Arin Preston

Source

ABA Conference

Segment

2021

Last Contact

8/21/2022

In this example, the Client was in contact after interaction at the 2021 ABA Conference. As you add ABA conferences for other years you attended, your Source record remains the same, but multiple “Segments” will be attached. Once you select a Source from the value list that appears, a list of Segments associated with that Source will drop into view, from which you can chose.

In the “Source” field, reference the mailing piece, advertising source, or event that represents your marketing effort; as well as the number mailed and/or the cost of your effort, as appropriate. If the event or marketing effort has “multiples”, move over to the “Seg Codes” field to load the factors. Here, the ABA Annual Convention is identified as the “Source” and there are two “Segments”, one for the 2020 Convention and one referencing the 2021. As you continue to participate in the conventions, add new segments to reflect the dates and descriptions. Marketing source and segment data is accessed for editing in Business Settings on the System Modules tab.

MARKETING DATA				Q Find
8	YES			
Record Number	Active			
ABA Annual Convention				
Source				
Number Mailed	Date Mailed			
Cost				
Seg Codes	Louisville, 2020	Seg Date		
Name	Louisville 2020 Convention			# 9
Description				
Seg Codes	Baltimore, 2021	Seg Date		
Name	Baltimore 2021 Convention			# 10
Description	Cancelled due to Covid			
Seg Codes		Seg Date		
Name				#
Description				

By running the “Source Report” from the Client Reports tab, you are able to track your “return on investment” for a specific marketing effort in terms of either how many new Client records were added or how many requests for information were received compared to the cost of that effort.

Bookings / Proposals Tab

On the left-hand side of the tab, you will see a list of bookings currently linked to this client. Click on “More Detail” to see additional information about the bookings, or click the up-arrow icon preceding to actually open the reservation in question. On the right, in the area named “Bookings for this Record as Group Leader”, a list of bookings related to a Client identified as a “Master/GL” record will display. In the area “Proposals/Records” you will see a list of all proposals sent to the Client. Clicking on the up-arrow that references either will take you to the related record.

CLIENT INFO: Lynne Stolk Lynne's Happy Campers

Select/View Client

- Fred Flintstone
- Wilma Flintstone
- Mike Alexander
- Arin Preston
- Lynne Stolk - Lynne's Happy Campers**
- Joseph Fitzgerald
- Josephine Fitzgerald
- Marquita Stephens - Minneapolis Urban League

Active x

Primary Contact

Title: Lynne, Last Name: Stolk, Business/School/Group: Lynne's Happy Campers, Business Title: Program Leader

Primary Email Address: lynne@happycampers.com, Preferred Contact Method: Email

Home #: (456) 789-1111, Cell #: , Work #: , Primary #: , Client Categories: ☒ Group Leader, ☐ Decision Maker, ☐ Individual Traveler, ☐ Other, ☐ Payer, ☐ Tour Operator

Mailing Address: ☐ Home, ☐ Business, ☐ Don't Mail

RELATED CLIENTS + Add Related

CRITICAL NOTES

This client is a VIP & long-time customer

First Traveled: 2023, Last Traveled: 2023

Notes / Activity | **Business / Group** | **Outside Sales / RFQs** | **Marketing** | **Bookings / Proposals** | **Email Log** | **Tasks / Docs** | **Reports**

CURRENT BOOKINGS

+ More Detail (1 Records)

Tour	Begin Date	Tour Code	PAX
Bahamas Cruise	Mon 28 Aug 23	CRU08282023	6

BOOKINGS FOR THIS CLIENT AS GROUP LEADER

Tour Name	Begin Date	Tour Code	PAX	First Traveler Name
Bahamas Cruise	Mon 28 Aug	CRU08282023	6	

PROPOSALS

Tour Name	Begin Date	Tour Status	PAX
-----------	------------	-------------	-----

Email Log Tab

This tab contains a log of emails sent to the Client out of TourTools. Hover over the various sections to see additional details. If an attachment was included (and if it was selected to be saved to the Client record at the time it was sent) you will find that attachment in the Document Library on the **Tasks / Docs** tab.

CLIENT INFO: Fred Flintstone

Select/View Client

- Fred Flintstone
- Wilma Flintstone
- Mike Alexander
- Arin Preston
- Lynne Stolk - Lynne's Happy Campers
- Joseph Fitzgerald
- Josephine Fitzgerald
- Marquita Stephens - Minneapolis Urban League

Active x

Primary Contact

Title: [] First Name: **Fred** Last Name: **Flintstone** Business/School/Group: [] Business Title: []

Primary Email Address: **lynnestolk@gmail.com** Preferred Contact Method: **Email** Mailing Address: ☐ Home ☐ Business ☐ Don't Mail

Home #: [] Cell #: [] Client Categories: ☐ Group Leader ☐ Decision Maker ☒ Individual Traveler ☐ Other ☐ Payer ☐ Tour Operator

Work #: [] Primary #: []

Home Address: **1234 Stoney Brook Grand Rapids MI 49512**

RELATED CLIENTS + Add Related

- Wilma Flintstone Individual Traveler

CRITICAL NOTES

Important notes that should be visible at all times.

First Traveled: **2023** Last Traveled: **2023**

Notes / Activity Business / Group Outside Sales / RFQs Marketing Bookings / Proposals Email Log Tasks / Docs Reports

EMAIL LOG

Subject	Sent To	Body Preview (hover to view full preview content)	Time	Attachment(s) Preview
Test Email	lynnestolk@gmail.com	This is a test	8/11/2022 10:01:34 AM	

Tasks / Docs Tab

On either tab, click on the “+” button to create a new task or add a new document to the library. As in all modules, the tasks will come find you on your dashboard when the due date approaches.

CLIENT INFO: Mike Alexander

Select/View Client

- Fred Flintstone
- Wilma Flintstone
- Mike Alexander
- Arin Preston
- Lynne Stolk - Lynne's Happy Campers
- Joseph Fitzgerald
- Josephine Fitzgerald
- Marquita Stephens - Minneapolis Urban League

Active x

Primary Contact

Title: [] First Name: **Mike** Last Name: **Alexander** Business/School/Group: [] Business Title: []

Primary Email Address: [] Preferred Contact Method: [] Mailing Address: ☒ Home ☐ Business ☐ Don't Mail

Home #: [] Cell #: [] Client Categories: ☒ Group Leader ☐ Decision Maker ☐ Individual Traveler ☐ Other ☐ Payer ☐ Tour Operator

Work #: [] Primary #: []

Home Address: **123 street**

RELATED CLIENTS + Add Related

CRITICAL NOTES

Important notes that should be visible at all times.

First Traveled: **2023** Last Traveled: **2023**

Notes / Activity Business / Group Outside Sales / RFQs Marketing Bookings / Proposals Email Log Tasks / Docs Reports

TASKS / DOCUMENTS

Tasks

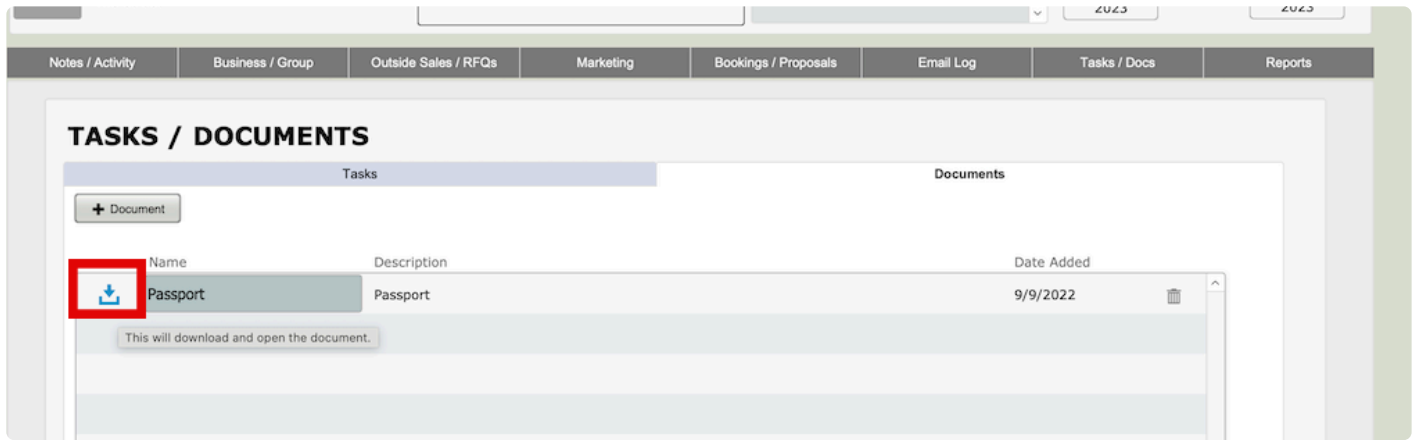
+ Task

Action Date	Action	Related Details	Assigned To	Entered By	Complete
08/16/22	Call Friday	Mike Alexander	Arin Preston	Arin Preston	<input type="checkbox"/>

Documents

PAST DUE DUE TODAY DUE WITHIN 7 DAYS Open Task List

On the Documents tab, click the button shown below to download and open the document.



Reports Tab

There are a few pre-built reports that come included with the Client module. You can add as many custom reports, docs, and lists as you'd like. Contact TourTools support if you have something in mind, we can build it for you quickly. For details, see the [Client Reports & Docs](#) section that follows.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Adding a New Client

✿ Before creating a new Client, search the module to be sure it does not already exist. Making this a standard part of the creation process can prevent issues related to duplicate records and bad data. Dupes can create havoc in a database. TIP: If the client name is Robert, for example, search for Bob as well – think of other ways the client name or business name may have been entered.

To create a new Client record, click on the “+ Client” button in either the List View or the Detail View.

You will be presented with two tabs where you are able to enter the information for a new Client. As soon as you add a First Name on the first tab, the “**Salutation (Dear) Name**” field will populate with that same name. The content of that field is what will appear after the “Dear” in any letter that you eventually generate from the system. If your relationship to the clients is friendly; “Gail”, might suffice; if a more formal salutation is appropriate, type “Ms. Barron”.

✕ Stop
Create New Client Record
Continue ➔

Click on Home Address or Business Address, complete the form then click Continue

Home Address

CLIENT DETAILS

Title	First Name	Middle Name	Last Name
<input type="text"/>	<input type="text" value="Gail"/>	<input type="text"/>	<input type="text" value="Barron"/>
Nickname	Salutation (Dear) Name		
<input type="text"/>	<input type="text" value="Gail"/>		

HOME ADDRESS

Street Address	Suite, Apt, Unit
<input type="text"/>	<input type="text"/>
City	State/Prov
<input type="text"/>	<input type="text"/>
Postal Code	Country
<input type="text"/>	<input type="text"/>

Send Mail To:

☐ Home
 ☒ Business
 ☐ Don't Mail

ALTERNATE ADDRESS

Street Address	Suite, Apt, Unit
<input type="text"/>	<input type="text"/>
City	State/Prov
<input type="text"/>	<input type="text"/>
Postal Code	Country
<input type="text"/>	<input type="text"/>

First Date at Alt Address

Last Date at Alt Address

Business Address

PHONE NUMBERS & EMAIL

Preferred Method of Contact:

Email Address

Work Phone	Cell Phone
<input type="text"/>	<input type="text"/>
Home Phone	Primary Phone
<input type="text"/>	<input type="text"/>
Parent Cell Phone	Other Phone
<input type="text"/>	<input type="text"/>
	Other Phone Type
	<input type="text"/>

MAILING GROUPS & MARKETING

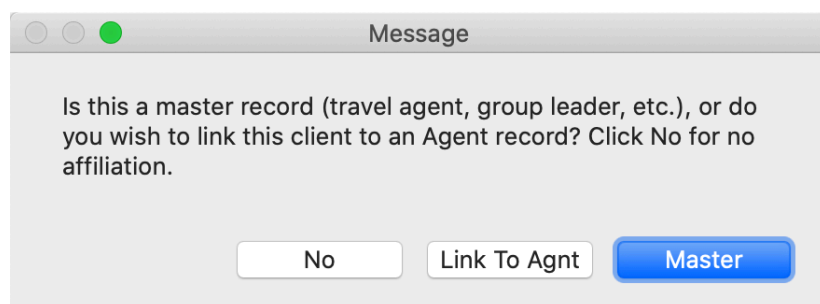
- ☐ Sold
- ☐ Currently Working With
- ☐ Past Sold
- ☐ Serious Follow Up
- ☐ Blast
- ☐ Cancel
- ☐ Archives

Source

Segment

Input address details as well as phone numbers and email addresses.

Note that, dependent on which tab you are working—Home Address or Business Address—the related “Send Mail To” value will have been selected automatically. That value can be changed manually as appropriate, and in cases where you don’t want mail to be directed to the Client in question, click “Don’t Mail”.



The remaining fields are explained in detail as we continue tab by tab through a completed Client record. Meanwhile, there is one question that you will be prompted to answer before a record is complete, and that is whether or not it is a “Master” or should be *linked* to a “Master”.

You will mark the Client as a “Master” when the record is for a re-seller of your product; another tour operator or travel agent, a group leader, perhaps the director of a senior center. A “Master” could also be a set of grandparents who are taking their entire family on a vacation that they are financing. Two things generally dictate tagging the record a “Master”: 1) You will not be receiving any contact information for their travelers; and 2) You will not be receiving payments from those travelers direct. Identifying a Client as a “Master” is what will enable your generating what is called a “Group Leader Invoice” in Bookings; i.e. an invoice representing charges for the entire group (explained in more detail in Chapter 7).

If the client is someone who sometimes books directly with you, and sometimes travels with one of your group leaders, you will click on the “Link to Agnt” button. When you do so, a dialog box will open, prompting you to identify the Master Record to which the record should be linked. From the list of clients who meet your “find” criteria, click on the name of choice and click “Continue”. Once you finish you will be returned to the main client entry screen.

If the record is for a travel agency the process differs slightly. Complete the fields on the Business Address tab then click on either the “New Agency” or the “Load Agency Defaults” button. When you click the *former*, you are first of all identifying the entity as a “Master Record”. When you click on the *latter*, you will be stepped through a process by which you will identify a previously created master record whose address, phone, commission level, etc., you want copied into the record you are creating (think agencies with multiple agents that you work with).

✖ Stop

Create New Client Record

Continue ➔

Click on Home Address or Business Address, complete the form then click Continue

Home Address
Business Address

Load Agency Defaults
New Agency

BUSINESS ADDRESS & CONTACT INFO

Business / School / Group Name

Street Address

Suite, Apt, Unit

City

State / Province

Zip Code

Country

Business Website

Business Phone

Business Fax

Business Cell

Business Email Address

Business Phone 2

As you create records, they will be marked as **“Active”** (status displays in the upper half of the record, on the right). This allows that a Booking can be made from the Client record. You can change the status, in other words de-activate a record and thereby prevent the possibility of a Booking being made, by clicking on the star icon. Some reasons you may want to “deactivate” a client include:

1. A client may have caused repeated problems on tour and you don't want them on a future trip. By deactivating their client record and *noting why you did so in “Notes”*, you can prevent recurring problems.
2. A client may have a balance outstanding that you are having difficulty collecting on and, until the account is closed, you don't want to allow additional booking activity. Again, you will want to make a note in the record to document the situation.

Note: De-activating a Client record does not prevent its being included in a set of labels you might prepare for a mailing. Usually it is advisable to use “Active” as one criteria when finding records for this purpose. If you de-activate a record for any of the above reasons, you may also want to put them on a “don't mail” status.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Making a New Booking for a Client

The booking process begins in a Client record. For details on [Making a Booking](#), click this link to jump to that section in Chapter 6.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: December 14, 2022

Making a New Proposal for a Client

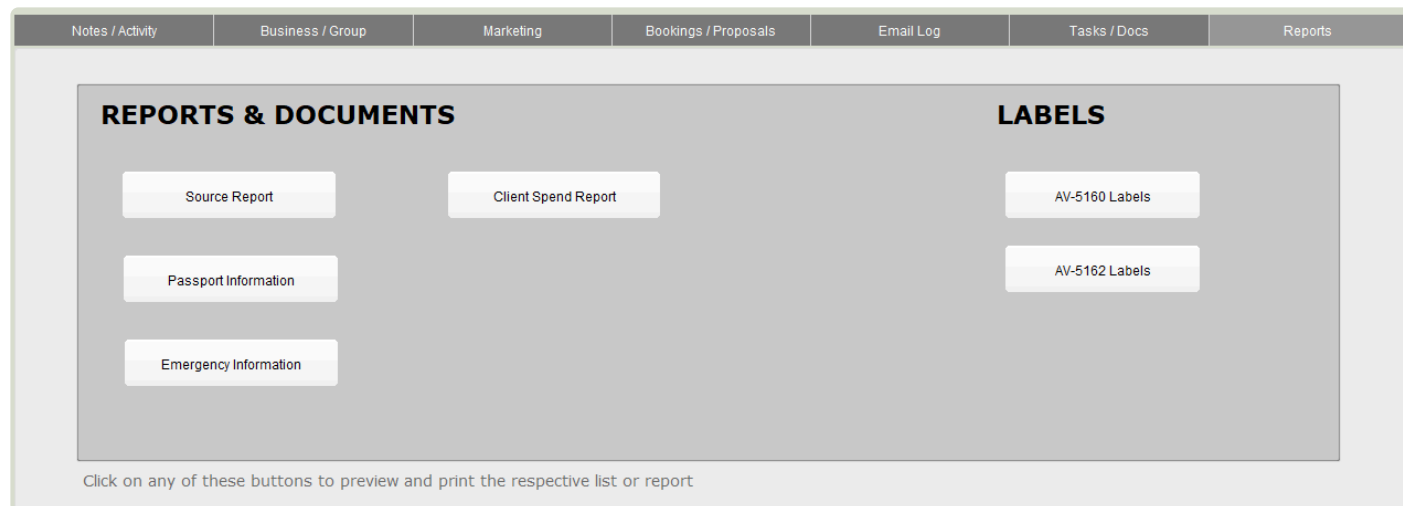
The proposal process begins in a Client record. For details on [Creating a Proposal](#), click this link to jump to that section in Chapter 5.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: December 14, 2022

Client Reports & Docs

There are a few pre-built reports that come included with the Client module. You can add as many custom reports, docs, and lists as you'd like. Contact TourTools support if you have something in mind, we can build it for you quickly.



Source Report

By running the “Source Report”, you are able to track your “return on investment” for a specific marketing effort in terms of either how many new Client records were added or how many requests for information were received compared to the cost of that effort.

Passport Information

This report is initially a form that can be used to solicit from your traveler their passport and emergency information and may then serve as a report you can provide to an escort accompanying a particular tour. In such a case, you would perform a “find” on the tour code from the “Use Find” layout and then print the document.

Emergency Information

Use this report as you would the Passport Information report. This form reflects the information included on the Emergency Info screen as well as birth dates, anniversary dates, etc.

Client Spend Report

Run this report to determine which Clients spent the most with you for a given date range.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Chapter 3: Vendors

The Vendor Module – CRM & Inventory Management System

TourTools v5 has a powerful Vendor module that allows you to store/manage contact details, documents, and communications. It also features a robust inventory management system for the suppliers you work with to build out your tours.

In many ways, the Vendor module is at the very heart of TourTools. The Contracted Services created here are the elements that are ultimately bundled into the Packages being sold, thereby creating receivables. And, each of those Package elements has a corresponding Operations record, where Bookings meet services sold, thereby creating payables.



Last modified: November 27, 2022

Vendor Module – List View

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

The Vendor List View allows you to see, at a glance, all of the Vendor records in the current found set.

Vendor Name	Address	City	State	Zip	Primary Phone #	Vendor Type	Primary Email Address	Active?	Select
Sight and Sound Theatres (Arin Preston)	Route 896	Strasburg	PA	17579-0310	(222) 333-4444	Attraction	arin@sightandsound.com	✓	<input type="checkbox"/>
On Scene BBQ	P.O. Box 3421	Arnold	ca	95223-3421		Restaurant		✓	<input type="checkbox"/>
Courtyard Alexandria Pentagon South	4641 Kenmore Avenue	Alexandria	VA	22304		Hotel		✓	<input type="checkbox"/>
Fresh Choice - Howe Avenue	535 Howe Avenue	Sacramento	CA	95815-8314		Restaurant		✓	<input type="checkbox"/>

Deleting Vendor Records

Although there is a trash can icon (delete) that is available to owners and managers only – it most often makes better sense to instead deactivate rather than remove the record in order that you can maintain the history associated with the person or entity. If you do decide to completely remove a record, select “Records” and then “Delete Record” from the FileMaker menu. You will be “second guessed” as to whether you really want to delete the record and once having answered “yes”, the record will be PERMANENTLY deleted, in other words, there is no “undo”, so be careful when you use this function.

Sorting

If you want to view the records in a particular order, you can sort them by clicking on the sort button at the top of any column. Clicking on the sort button again will sort them by that field again, in reverse order.

Dashboard	Tasks	Clients	Vendors	Tours	Packages
Export	+ Vendor	eBlast	Show All		
Found Count: 15					
Vendor List					
QUICKFIND FILTER					
Vendor Name	Address	City	State	Zip	Primary Phone #
↶ Lake Louise Sightseeing Gondola (Sue Cameron)	P.O. Box 5	Lake Louise	AB	T0L 1E0	(403) 522-3555
↶ Sight & Sound Theatres	300 Hartman Bridge Road	Strasburg	PA	17579-0310	(717) 687-4220
↶ Wendella Sightseeing Boats		Chicago	IL	60611	(312) 337-1446
↶ Shoreline Sightseeing - Architecture Cruise (Toni	474 N. Lake Shore Drive	Chicago	IL	60611	(312) 373-7258
↶ Ozark Mountain Sightseeing, Inc. (Ed		Springfield	MO	65804-7210	(417) 334-1850
↶ Wendella Sightseeing		Chicago	IL	60659-7815	(312) 337-1446
↶ Sequoia Sightseeing Tours		Three Rivers	CA	93271	(559) 561-4189
↶ Barefoot Princess Riverboat Sightseeing	P O Box 1759	Myrtle Beach	SC	29598	(843) 272-6796
↶ City Sights, Inc. Not offering step-on guides	369 East 900 South	Salt Lake City	UT	84111	(801) 531-1001
↶ City Sightseeing New Orleans	101 Burgundy Street	New Orleans	LA	70112	(504) 636-1029

If you have a higher-level login, you can also click on the “Records” menu at the top of the screen and then on “Sort Records”. Doing so will open a window listing the fields in use on the layout you are on. Select the one(s) you want to use (such as Vendor Name), by double clicking on the field name to move it to the right, then click on “sort” and the records will sort in the manner you selected. If you want to re-order the fields on the right, clicking and dragging on the double-arrow symbols to the left of the field name will accomplish that task.

The screenshot shows the FileMaker Pro application window. The menu bar includes FileMaker Pro, File, Edit, View, Insert, Format, Records, Actions, Scripts, Tools, Window, and Help. The 'Records' menu is open, displaying various options. The background shows a table with columns for Vendor Name, Address, and Primary Phone #. The 'Sort Records...' option is highlighted in blue.

Records Menu Options:

- New Record (⌘N)
- Duplicate Record (⌘D)
- Delete Record... (⌘E)
- Delete Found Records...
- Go to Record >
- Refresh Window (⇧⌘R)
- Show All Records (⌘J)
- Show Omitted Only
- Omit Record (⌘T)
- Omit Multiple... (⇧⌘T)
- Modify Last Find (⌘R)
- Saved Finds >
- Sort Records... (⌘S)**
- Unsort
- Replace Field Contents... (⌘=)
- Relookup Field Contents
- Revert Record... (⌘Z)
- Next (⌘↓)

Table Data:

Vendor Name	Address	Primary Phone #
Lake Louise Sightseeing Gondola (Sue Cameron)	P.O. Box 5	(403) 522-3555
Sight & Sound Theatres	300 Hartman Bridge Road	(717) 687-4220
Wendella Sightseeing Boats		(312) 337-1446
Shoreline Sightseeing - Architecture Cruise (Toni)	474 N. Lake Shore Drive	(312) 373-7258
Ozark Mountain Sightseeing, Inc. (Ed)		(417) 334-1850
Wendella Sightseeing		(312) 337-1446
Sequoia Sightseeing Tours	Three Rivers CA 93271	(559) 561-4189

The screenshot shows the 'Vendor List' application window. At the top is a 'Feature Bar' with buttons: Export, Vendor, eBlast, Show All, and Find. Below this is a 'QUICKFIND FILTER' section with several input fields. The main table has columns: Vendor Name, Address, City, State, Zip, Primary Phone #, and Vendor Type. A 'Sort Records' dialog box is open in the center. It has a 'Current Layout ("VEN_List_View")' dropdown and a list of fields: Active, Address 1, City, g_Vendor_Search_rep, Selected, State, Type Service, VendorNamePlusContactName, Zip, VENDOR_Contacts::PhoneWork, and VENDOR_MainContact::EmailAddr... To the right of this list are 'Clear All' and 'Clear' buttons. Below the list is a 'Sort Order' section with a list containing 'State' and 'City' (which is highlighted). Below the 'Sort Order' list are radio buttons for 'Ascending order' (selected), 'Descending order', and 'Custom order based on value list'. There is also a '<unknown>' dropdown. Below these are checkboxes for 'Reorder based on summary field' and 'Override field's language for sort', with a 'Specify...' button and an 'English' dropdown. At the bottom of the dialog are checkboxes for 'Keep records in sorted order' (checked), 'Unsort', 'Cancel', and 'Sort' buttons.

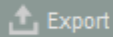
Printing



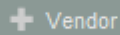
All primary modules have a printer button at the top right of both List View screens and Detail View screens. Click this button to print the data you are currently viewing on the screen.

Feature Buttons

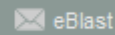
In the thin green/gray button bar we call the Feature Bar (just below the Module Navigation bar) at the top of this screen, you will find access to various scripted functionality related to the list.



Export



+ Vendor



eBlast

Export

Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

+ Vendor

Use this button to add a new Vendor record to your TourTools system. For more details see the following section on [Adding a New Vendor](#).

eBlast

This button is the gateway to creating an eBlast to a target set of Vendors. Create a found set of Vendor records based on your campaign criteria. We recommend limiting eBlasts to no more than 250 Vendors at a time to avoid issues with your email provider and having your emails flagged as spam. Click this link to see complete details on using the [TourTools eBlast Feature](#) in Chapter 1.



Find



Reports

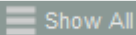


New Window

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen. When you are ready to initiate the process, click on the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

Show All



Show All

Eliminates any filters you have on your list and shows all Vendors. This button only shows when you are in a found set and NOT viewing all records.

Reports

This button is a shortcut to the Vendor Reports tab.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Vendor Module – Detail View

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Vendor.

Feature Buttons

List View

Use this button to return to the Vendor List View.

+ Vendor

Use this button to add a new Vendor record to the system. Click this link to jump to the section detailing the process to [Add a New Vendor](#) to your system.

< Ops

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Operations records related to this Vendor.

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Vendor Details Layout

To keep things simple, we're going to address first of all the information seen on the top half of the Vendor record. After that, we'll go tab by tab through the bottom section.

Most of the fields are obvious as to the content. Phone fields will automatically format; in other words, there's no need to include punctuation as you input the number, the system will add that for you. Select the **Service Category** and **Type of Vendor** from value lists that present. These lists are maintained in the Value Lists system module, accessed from the Settings > Business Settings. The **Reservations Link** is to jump to the page where you can book services with the Vendor, if different than the **Website URL**.

Vendor Details Record ID 4683

McKellar Family Farm

Active x

(Arin)

agon

je

I Game

Vendor Name: McKellar Family Farm

Type of Vendor: Attraction

Service Category: Admission

Service/Onsite Address: 32988 Road 164

Metro Area:

City: Ivanhoe St/Prov: CA Postal Code: 44321

OK to use? OK to Use

Default Currency:

Country: United States Website: https://farmerbobsworld.com/ Reservations Link: https://farmerbobsworld.com/events/

CRITICAL NOTES

This Vendor requires a signed waiver

Critical Notes are important comments about the Vendor that you want to remain always visible – regular notes get pushed downward on the page as new notes are entered, creating a history of sorts.

There is a container for a **Vendor image** at the top right of the Vendor record. You can drag and drop an image here to keep handy for marketing purposes.

The **Default Currency** field will auto-fill with “USD”. If this is not correct, select from the value list the monetary unit that the Vendor will be paid in (this value list compiles based on the currency records that exist in the Currency system module, accessed from the Settings > Business Settings).

The **QB Vendor ID** is only relevant if you have the QuickBooks Module. This ID number relates to the associated record in your QuickBooks account. Add the Vendor's **Taxpayer ID** if it is relevant to you.

Vendor Contacts & Notes Tab

VENDOR CONTACTS + New Contact

★ **First Name** **Last Name** **Title** **Email** **Address**

Arin Preston Manager arin@sightandsound.com

☒ Onsite ☐ Group Sales ☐ Sales ☐ Meals
☐ Accounting ☐ Marketing ☐ Rooms ☐ Events

Work # (222) 333-4444 **Toll Free**
Cell # **Fax #**

Notes:

NOTES + General Note + Call + Email + Fax + Letter + Meeting **ACTIVITY LOG**

Compose a new note here, then click the applicable button above. The GENERAL button adds a general note to the vendor record (below), the specific buttons will add your note below and also add an entry to the activity log to the right.

8/9/2022 Arin Preston: test
 Arrive 45 min early - Allow 1 hr to next stop - No Shows Sun or Mon // Section ___ // S/S Bus Greeter will deliver tickets to EPL at MC

Enter all of your contacts for this Vendor in the Contacts portal. The contact that you designate as “primary” (by clicking on the star icon and seeing it turn yellow) will push this contact’s information to the list view for the Vendor.

Products / Prices Tab

The loading of services you have contracted with your Vendors begins here.

It might be helpful to think of the relationships in this part of the system as a series of file cabinets, each of which has multiple drawers, in which are contained all of your contracts. In the example that follows, Lynne’s Cruise Line — the Vendor — is the file cabinet, and we are about to allocate and label one drawer (a Product record), in which we expect to find paperwork documenting all of the reservations we have made for accommodations and meals anytime during 2022 (represented by Contracted Service records). At the point we contract services for 2023, we will create — manually or via the “duplicate” process — a second Product record (a second drawer), in which we will find Contracted Service records (contracts) related to reservations for the new year.

Click on this link for details on how to use the [Product Library & Contracted Services](#).

Tours Tab

This tab shows a list of Tours that include products/services from this Vendor.

Active x

Vendor Name: **Courtyard Alexandria Pentagon South** Type of Vendor: **Hotel** Service Category: **Rooms**

Service/Onsite Address: **4641 Kenmore Avenue** Metro Area: **Washington DC** QB Vendor ID: Taxpayer ID:

City: **Alexandria** St/Prov: **VA** Postal Code: **22304** OK to use?: **OK to Use** Default Currency: **USD**

Country: Website: Reservations Link:

CRITICAL NOTES
Important notes that should be visible at all times.

Drag & Drop Vendor Image for Marketing & Web

Vendor Contacts & Notes | Products / Prices | Tours | **Itinerary & Proposal Notes** | Deadlines | Email Log | Tasks / Docs | Reports

Tours

Tour#	Tour Name	Date Begin	Date End	Days	Nights	Status
18582	DC Performance	Sat 28 Oct 23		7	6	Active
Double-Double Rooms including Buffet Breakfast						

Itinerary & Proposal Notes Tab

This is one of many spots where you can enter “notes” that become part of printed documents later on. The field labels give an indication of which notes appear on what documents.

List View + Vendor Ops Find Show All New Window

Record 2 of 2

VENDOR INFO: Chattanooga Choo Choo Hotel Kelly Skinner

Select/View Vendor

Choo Choo Barn, Inc.

Chattanooga Choo Choo Hotel

Active x

Vendor Name: **Chattanooga Choo Choo Hotel** Type of Vendor: **Hotel** Service Category: **Rooms**

Service/Onsite Address: **1400 Market Street** Metro Area: QB Vendor ID: **80000AFA** Taxpayer ID:

City: **Chattanooga** St/Prov: **TN** Postal Code: **37402-4429** OK to use?: **Ok to Use** Default Currency: **USD**

Country: **USA** Website: **www.choochoo.com** Reservations Link:

CRITICAL NOTES
Important notes that should be visible at all times.

Drag & Drop Vendor Image for Marketing & Web

Vendor Contacts & Notes | Products / Prices | Tours | **Itinerary & Proposal Notes** | Deadlines | Email Log | Tasks / Docs | Reports

Itinerary & Proposal Notes

Level 1 Notes - flows forward to products in the Vendor Product Library

Proposal Notes (appears on proposals)

The Chattanooga Choo Choo is the only Historic Hotels of America resort in Chattanooga, TN. The Terminal Station in Downtown Chattanooga has been converted into the most fun and beautiful of all Chattanooga hotels!

This evening you enjoy dinner at the hotel's Station House Restaurant with singing waiters.

Relax in the center of lush green plants and enjoy the view of the formal gardens. The Gardens is located off the dome lobby, where you will start your morning with a delightful breakfast buffet.

Itinerary Notes (appears on itineraries)

Welcome to one of the South's most renowned and unique landmarks. This 24-acre vacation and convention complex is located in the heart of Chattanooga and has something for everyone. The Choo Choo combines history and fun in a delightful blend that appeals to visitors of all ages. The rooms in our three hotel buildings offer spacious accommodations to suit the corporate traveler or the vacationing family. All rooms at the Choo Choo provide wireless high speed internet, coffee maker, hair dryer, iron + ironing board, and a voice mail system. Amenities include, but are not limited to Fitness room, tennis courts, business center, dry cleaning service, wireless high speed internet, and swimming pools.

***ESCORT NOTE: Upon arrival, please coordinate luggage pick-up for departure morning with the front desk staff. Now would be a good time to alert your group that they will probably need to leave a cash deposit or credit card authorization with the front desk staff if they wish to use the telephone in their rooms. Also let your passengers know that they will need to turn in their room keys and pay any incidentals before going to breakfast departure morning.

Escort Notes (appears on the escort notes and group leader notes)

You will need to present your breakfast voucher that you received upon arrival to the hotel.

Driver Notes (appears on the escort notes, group leader notes, and driver's notes)

You may wish to enter colorful and enticing marketing copy into the **Proposal Notes** field.

Itinerary Notes tend to be more informational or instructional, as they are included on documents provided to the individual travelers.

In the **Escort Notes** field, common entries include information that your escort should be aware of like

restaurant hours, the fact that the hotel likes to welcome the group upon arrival, etc.

In the **Drivers Notes** field you might touch on where passengers should be dropped and where parking is available.

Click this link for a more in-depth description of how [Vendor Product Notes](#) work within the TourTools system (where they originate, how they can be edited, etc.).

Meanwhile, given that notes will copy from one part of the system to the next in sort of a hierarchical way, it makes sense to initially load multiple descriptions at the Vendor level, knowing that edits are possible as you move along. By example, the Vendor might be a hotel, for which you are going to create Contracted Service records for rooms and for meals. Go ahead and enter descriptive information for both services in the same field, knowing that what is not appropriate to the *specific* record down line can be edited out, without there being any effect on the *original* note.

Deadlines Tab

DEADLINES

Deposit Info

Deposit Amount

Refund Policy
☐ Refundable
☐ Non-Refundable

Deposit Date

Days Prior

Cancel Tour w/o Penalty

Days Prior

Final Count

Days Prior

Rooming List

Days Prior

Fields in this area should be completed only when the deadlines, amounts and terms referenced are always the same for the Vendor, which in reality is rarely the case. More often than not, deadlines and amounts are dependent on variables like the date of service, the size of the group, and the like. As such, it usually makes more sense to create Task reminders in your Ops records, which will be tied to a very specific service, in connection with a very specific tour. If you do elect to fill in the fields here, Task reminders will be created for you each and every time this Vendor is linked to a Package.

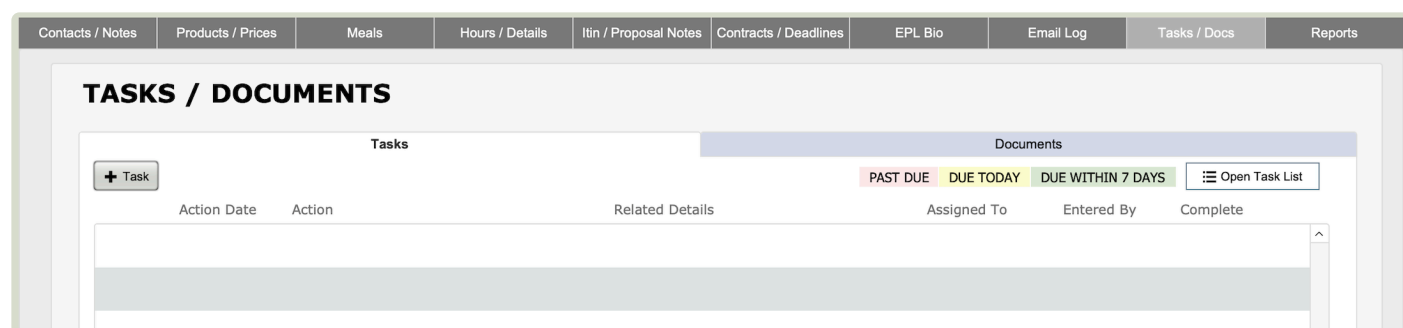
Email Log Tab

This tab, as you'd expect, shows email activity related to this Vendor and allows you to recall the details as needed. If it was selected at time of sending, attachments are saved and available for reference as well.

Tasks / Docs Tab

Functionality in the **Tasks** area is identical to what happens in Client and all other modules. Add tasks related to the Vendor by using the **+ Task** button – they will come find you on the Dashboard as they require

action.



Documents associated with a particular Vendor, perhaps a copy of a motorcoach company's promo ad with photos and specs on their fleet, can be attached to the record by clicking on the **+ Document** button. You will be stepped through the process of naming and describing the document, then browsing, identifying and attaching the document.

Reports Tab

There are a few pre-built reports that come included with the Vendor module. You can add as many custom reports, docs, and lists as you'd like. Contact TourTools support if you have something in mind, we can build it for you quickly. For details, see the [Vendor Reports & Docs](#) section that follows.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Adding a New Vendor

✿ Before creating a new Vendor, search the module to be sure it does not already exist. Making this a standard part of the creation process can prevent issues related to duplicate records and bad data. Dupes can create havoc in a database. TIP: If the Vendor name is “Sight & Sound”, for example, search for “Sight and Sound” as well – think of other ways the Vendor name may have been entered.

To create a new Vendor record, click on the “+ Vendor” button at the top of the screen in the thin green bar of Feature Buttons.

+ Vendor

The first thing you will be prompted to do is add the name and details for your primary contact for the Vendor.

If you do not have any contact information to enter, click the CANCEL button to close the window and begin entering other Vendor details.

Create New Vendor Contact

Please enter the contact details below.

***Required fields are marked with an asterisk**

* First Name

* Last Name:

Title

Cell

* Work

* Email

Type
☐ Onsite
☐ Accounting
☐ Group Sales

☐ Marketing
☐ Sales
☐ Rooms

☐ Meals
☐ Events

Cancel

Submit

Once you click SUBMIT, your new Vendor record with the contact you just created will come into view. Click on the STAR icon next to the Vendor contact you just created to designate it at the “Primary” contact – like is done in the Client Module. The star icon will turn yellow, indicating this person has been designated as the Primary contact (this will add their contact info to the Vendor record in the Vendor list view).

Vendor Details Record ID 811

VENDOR INFO: Sight and Sound Theatres

Select/View Vendor

- Sight and Sound Theatres
- On Scene BBQ
- Courtyard Alexandria Pentagon South
- Fresh Choice - Howe Avenue
- New York Yankees Baseball Game
- C & E Motorcoach, Inc.
- Cracker Barrel - Holyoke
- Wingate By Wyndham
- Sheraton Valley Forge Hotel
- Springhill Suites Marriott Atlanta Buckhead- **DO NOT USE**
- Pietro's Coal Oven Pizzeria
- Hyatt Place Scottsdale/Old Town
- Hampton Inn Las Vegas Red Rock Summerlin
- Springhill Suites - Lynchburg Airport
- McKellar Family Farm

CURRENT FOUND SET

Active x

Vendor Name: Sight and Sound Theatres

Type of Vendor: Attraction

Service Category: Tickets

Service/Onsite Address: Route 896

Metro Area:

QB Vendor ID:

Taxpayer ID:

City: Strasburg St/Prov: PA Postal Code: 17579-0310

OK to use? OK to Use

Default Currency: USD

Country:

Website: https://ticketcenter.sight-sound.com/

Reservations Link:

CRITICAL NOTES

Important notes that should be visible at all times.

VENDOR CONTACTS

Vendor Contacts & Notes Products / Prices Tours Itinerary & Proposal Notes Deadlines Email Log Tasks / Docs Reports

Vendor Contact: Arin Preston, Manager, Email: arin@sightandsound.com, Address:

Notes:

ACTIVITY LOG

8/9/2022 Arin Preston: text

Most of the fields are self explanatory. As in Client, it is not necessary to enter a city and state; rather, enter the zip code and those fields will auto-fill. “Phone fields” will automatically format; in other words, there’s no need to include punctuation as you input the number, the system will add that for you. Select the “Service Category” and “Type of Vendor” from value lists that present. These lists are managed in Settings > Business Settings > System Modules > Value Lists. Feel free to update them, as needed, to categorize your Vendors in a way that makes sense for your business.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Managing Currency

Creating and Maintaining Currency Records

When you add a new Vendor to your system, the “Default Currency” field will auto-fill with “USD”. If this is not correct, select from the value list the monetary unit in which the Vendor will be paid. This value list compiles based on the currency records that exist in Settings > Business Settings > System Modules > Currency. This is where you will add new currency records, as needed. Create a new record by clicking on the “+ New” button and identify the currency with the universally accepted three-character code. Note there is a field where you can load the URL of your favorite currency exchange website, which can be accessed by clicking on the “Open” button.

EXCHANGE RATES AND ESTIMATES

Currency

CAD

Enter Exchange Rates

1\$ USD will buy

1.26322

CAD

1 CAD will cost

.79162

USD (Payments)

1 CAD =

.85

USD (Costing)

Calculated Estimates

1\$ USD =

1.2632323589601071

CAD

1 CAD =

.7916277449692057

USD (Payments)

URLS for Currency Converters

Open

https://www.oanda.com/currency/converter/

Post Update Note

Complete the record by filling in the first field, highlighted in this example at the top, in yellow. This amount represents what one US Dollar will *purchase* in the foreign currency. Once that field is loaded, the corresponding yellow-highlighted field below will auto-fill with the “inverse” value of the currency, or, what one currency unit will *cost* in US Dollars. Take that number — rounded if you wish — and load it in the field highlighted here in blue at the top of the screen. That is the exchange rate that will be in effect were you to make a payment from Ops. The inverse of *that* amount will auto-load to the blue highlighted field below.

The last — and most important — field to complete is the one highlighted in red, labeled “Costing.” As you build a Package using services from the Vendor in question, this amount is what will be used to convert/ calculate the cost. **Since many tours are costed a year or more in advance of their actual operation,**

you will probably want to allow some “wobble room” to allow for fluctuation in the exchange rate. In this scenario, the exchange rate could change by more than five cents in the Vendor’s favor before the costing of the trip would be negatively affected. Conversely, if the exchange rate improves by the time we have to pay the Vendor, the profit margin on the Package increases.

When all of your input is complete, use the “Post Update Note” field to load some reference of who last updated the rate — perhaps their initials — and on what date.

More specifics on currency exchanges as they relate to costing tours and making payments are covered in the Package and Ops chapters.

*The importance of properly identifying the currency in which the supplier will be paid cannot be overstated. If it is mis-identified and the currency mis-valued, there will be cascading effects that could negatively impact your pricing and profitability.

If an incorrect currency is associated with a Vendor record at this level and goes undetected to the point that Operations records have been created, there is no “fix” other than to strip the incorrect Contracted Service record from each affected Package, and then delete the Contracted Service record from the Vendor record. Only then can you reassign the currency associated with the Vendor and start building your Contracted Service records, Packages, etc., all over again (all of this will be explained further as we move along).*

Last modified: December 14, 2022

Vendor Product Notes

Throughout the TourTools v5 system, you will find fields that invite input/editing of Vendor Product Notes that will ultimately appear on proposals, final itineraries and such. These product notes can be edited as you move from one part of the system to another, as explained below.

! These “Product Notes” are for Proposal/Booking documents and should not be confused with regular notes that are maintained in various modules for tracking internal communication and interactions, as seen below.

Record 1 of 11

Client Details

Record ID 150494

CLIENT INFO: Fred Flintstone

Select/View Client

- Fred Flintstone
- Wilma Flintstone
- Mike Alexander
- Arin Preston
- Lynne Stolk - Lynne's Happy Campers
- Joseph Fitzgerald
- Josephine Fitzgerald
- Marquita Stephens - Minneapolis Urban League
- Arin Preston
- Susan Smith - Creston High School
- Eduardo Valenzuela

Active x

Primary Contact

Title First Name Last Name Business/School/Group Business Title

Primary Email Address Preferred Contact Method Mailing Address

Home # Cell # Work # Primary #

Home Address

1234 Stoney Brook Grand Rapids MI 49512

Client Categories

- ☐ Group Leader
- ☐ Decision Maker
- ☒ Individual Traveler
- ☐ Other
- ☐ Payer
- ☐ Tour Operator

RELATED CLIENTS

CRITICAL NOTES

Important notes that should be visible at all times.

First Traveled 2023 Last Traveled 2023

Notes / Activity Business / Group Marketing Bookings / Proposals Email Log Tasks / Docs Reports

NOTES

+ General Note + Call + Email + Fax + Letter + Meeting

Compose a new note here, then click the applicable button above. The GENERAL button adds a general note to the client record (below), the specific buttons will add your note below and also add an entry to the activity log to the right.

8/11/2022 Lynne Stolk: Type here to add a general note

ACTIVITY LOG

09/01/22 Booking

08/11/22 Email sent by Lynne Stolk

Record 4 of 8

Vendor Details

Record ID 4703

VENDOR INFO: Sundance Grill

Arin Preston

Select/View Vendor

- Courtyard Alexandria Pentagon South
- Compass Coach
- JW Marriott Hotel
- Sundance Grill (Arin Preston)
- Friends Tours, Inc
- Lynne's Cruise Company
- XYZ Charter Company
- Clyde's of Georgetown

Active x

Vendor Name Type of Vendor Service Category

Sundance Grill Restaurant Meals

Service/Onsite Address Metro Area QB Vendor ID Taxpayer ID

City St/Prov Postal Code OK to use? Default Currency

Grand Rapids MI 49503 OK to Use USD

Country Website Reservations Link

CRITICAL NOTES

Important notes that should be visible at all times.

Vendor Contacts & Notes Products / Prices Tours Itinerary & Proposal Notes Deadlines Email Log Tasks / Docs Reports

VENDOR CONTACTS

+ New Contact

First Name Last Name Title Email Address

Arin Preston arin@datavast.net

Onsite Group Sales Sales Meals Work # (222) 333-4444 Toll Free

Accounting Marketing Rooms Events Cell # Fax #

Notes:

NOTES

+ General Note + Call + Email + Fax + Letter + Meeting

Compose a new note here, then click the applicable button above. The GENERAL button adds a general note to the vendor record (below), the specific buttons will add your note below and also add an entry to the activity log to the right.

11/25/2022 Developer: Called today to advise of closure July 2023 for remodel

ACTIVITY LOG

Product Notes Begin in Vendor on the Itin & Proposal Notes Tab (Level 1)

The first level of **Vendor Product Notes** that you can create are in the Vendor Module. Select a Vendor and open the Detail View, then navigate to the **Itinerary & Proposal Notes** tab.

Vendor Details Record ID: 3680 Kelly Skinner

VENDOR INFO: Chattanooga Choo Choo Hotel

Select/View Vendor

- Choo Choo Barn, Inc.
- Chattanooga Choo Choo Hotel

Active

Vendor Name: Chattanooga Choo Choo Hotel
 Type of Vendor: Hotel
 Service Category: Rooms
 Service/Onsite Address: 1400 Market Street
 Metro Area:
 City: Chattanooga St/Prov: TN Postal Code: 37402-4429
 OK to use? OK to Use Default Currency: USD
 Country: USA Website: www.choochoo.com
 Reservations Link: [www.choochoo.com](#)

CRITICAL NOTES
 Important notes that should be visible at all times.

Itinerary & Proposal Notes Level 1 Notes - flows forward to products in the Vendor Product Library

Proposal Notes (appears on proposals)
 The Chattanooga Choo Choo is the only Historic Hotels of America resort in Chattanooga, TN. The Terminal Station in Downtown Chattanooga has been converted into the most fun and beautiful of all Chattanooga hotels!
 This evening you enjoy dinner at the hotel's Station House Restaurant with singing waiters.
 Relax in the center of lush green plants and enjoy the view of the formal gardens. The Gardens is located off the dome lobby, where you will start your morning with a delightful breakfast buffet.

Escort Notes (appears on the escort notes and group leader notes)
 You will need to present you breakfast voucher that you received upon arrival to the hotel.

Itinerary Notes (appears on itineraries)
 Welcome to one of the South's most renowned and unique landmarks. This 24-acre vacation and convention complex is located in the heart of Chattanooga and has something for everyone. The Choo Choo combines history and fun in a delightful blend that appeals to visitors of all ages. The rooms in our three hotel buildings offer spacious accommodations to suit the corporate traveler or the vacationing family. All rooms at the Choo Choo provide wireless high speed internet, coffee maker, hair dryer, iron + ironing board, and a voice mail system. Amenities include, but are not limited to Fitness room, tennis courts, business center, dry cleaning service, wireless high speed internet, and swimming pools.
 ***ESCORT NOTE: Upon arrival, please coordinate luggage pick-up for departure morning with the front desk staff. Now would be a good time to alert your group that they will probably need to leave a cash deposit or credit card authorization with the front desk staff if they wish to use the telephone in their rooms. Also let your passengers know that they will need to turn in their room keys and pay any incidentals before going to breakfast departure morning.

Driver Notes (appears on the escort notes, group leader notes, and driver's notes)

This is one of many spots where you can enter product notes that become part of printed documents later on. The field labels give an indication of which notes appear on what documents.

You may wish to enter colorful and enticing marketing copy into the **Proposal Notes** field.

Itinerary Notes tend to be more informational or instructional, as they are included on documents provided to the individual travelers.

In the **Escort Notes** field, common entries include information that your escort should be aware of like restaurant hours, the fact that the hotel likes to welcome the group upon arrival, etc.

In the **Drivers Notes** field you might touch on where passengers should be dropped and where parking is available.

Meanwhile, given that notes will copy from one part of the system to the next in sort of a hierarchical way, it makes sense to initially load multiple descriptions at the Vendor level, knowing that edits are possible as you move along. By example, the Vendor might be a hotel, for which you are going to create Contracted Service records for rooms and for meals. Go ahead and enter descriptive information for both services in the

same field, knowing that what is not appropriate to the specific record down line can be edited out, without there being any effect on the original note.

Product Notes Pull from Vendor Into Vendor Product Details (Level 2)

The next level of **Vendor Product Notes** are in the Product Details record. Navigate to the Product Library and open the Product Details. This 2nd level of notes are pulled in from the Vendor record and available for adjustment here, as needed. Changes will flow forward into Package and Operations, but will not result in any changes at Level 1.

Record 1 of 1 | ID # 6174

PRODUCT DETAILS

CURRENT VENDOR: CHATTANOOGA CHOO-CHOO HOTEL Proposal Only ☐

Description (Internal): Rooms, Meals & Attractions Category: Rooms Default Currency: USD Start Date: 01/01/12 End Date: 12/31/12

CONTRACTED SERVICES + New Contracted Service

Name & Description	Start	End Date	Price	Type Service	ID#	Inv On?	Availability
Edit Overnight Accommodations	01/01/12	12/31/12	\$75.00	Hotel	9822	No	off
Edit Breakfast	01/01/12	12/31/12	\$12.00	Restaurant	9823	No	off
Edit Dinner at the Station House	01/01/12	12/31/12	\$23.00	Restaurant	9839	No	off
Edit New Orleans Trolley Ride	01/01/12	12/31/12	\$0.00	Attraction	9862	No	off
Edit Model Railroad Museum	01/01/12	12/31/12	\$0.00	Attraction	9867	No	off

Contracted Service Details

Name & Description (external - will appear on proposal): **Overnight Accommodations** Start Date: 01/01/12 End Date: 12/31/12 Start Time: End Time:

Room Costs		Per Person Costs		Fixed Costs	
# Sing: 0	# Dbl: 0	Net Single: 75.00	Net Double: 75.00	Net Triple: 75.00	Net Quad: 75.00
		Tax: .1725	Bags: 4.00	Occupancy Tax: 0.00	# Comps: 1
				Level: 1	Driver Room: 54.00
RM Inv: 0	Available:	<input checked="" type="radio"/> Per Room <input type="radio"/> Per Person		<input checked="" type="radio"/> Per Night <input type="radio"/> Per Stay	
Room Rate:		Room Billing:			

[Print Control](#)

☐ Esc/Drv ☐ Itin ☐ Vch ☐ Conf

[Back to Product Library](#) [Attach](#)
[Expand/Edit Details](#) [Duplicate](#)
☐ Inventory On
☒ Inventory Off
☐ Omit on Itinerary?
[Delete Contracted Service](#)

CURRENT TOUR/PKG DETAILS

Tour #: 3308 Tour Name: GND092623-1
 Start Date: 10/22/13 End Date: 11/13/13 [Q Tour](#) [Q Package](#)

Pack#: 3308 Package Name: GND092623-1
 Date Begin: 10/22/13 Date End: 11/13/13 [Q Package](#)

Product Notes for Documents

Level 2 Notes - pulled from Vendor Itin & Proposal Notes tab, editable here, flows forward only to package elements

The Chattanooga Choo Choo is the only Historic Hotels of America resort in Chattanooga, TN. The Terminal Station in Downtown Chattanooga has been converted into the most fun and beautiful of all Chattanooga hotels!

Proposal Notes (Package)

Welcome to one of the South's most renowned and unique landmarks. This 24-acre vacation and convention complex is located in the heart of Chattanooga and has something for everyone. The Choo Choo combines history and fun in a delightful blend that appeals to visitors of all ages. The rooms in our three hotel buildings offer

Itinerary Notes (Operations)

Escort Notes

Driver Notes

Conditions & Terms (Internal)

As always, at each level, any changes or adjustments made flow forward but never backward.

Product Notes Pull From Vendor Product Details Into Package Elements (Level 3)







On the **Main / Itinerary** tab in **Package**, click on the up-arrow button to the left of any Package Element to open its Detail View.

Package/Option Name			Pkg Type
Choo Choos of Chattanooga - AAA East Central			PKG
Tour Name			Tour #
Choo Choos of Chattangooa - AAA East Central			6059
Start	Days	End	Nights
Tue, Apr 24, 2012	4	Fri, Apr 27, 2012	3

Main / Itinerary	Add Products/Services	Pricing
------------------	-----------------------	---------

REVIEW/MANAGE ITINERARY

[Duplicate](#)

PACKAGE ELEMENTS	
Vendor	Description
 Chattanooga Choo Choo Hotel	Overnight Accommodations 
 Mayfield Ice Cream Factory	Mayfield Ice Cream Factory Tour 
 Chattanooga Choo Choo Hotel	Dinner at the Station House 

Any changes made to the proposal/voucher notes (see below) do not flow backward to the Vendor Product Notes. Basically, when you edit the product notes here, you do so just to change what is reflected in the Proposal.

Update Exchange Update Prices

Record # 1 of 1

Package Element Details

Record ID 8246

Main		PP/Group Rate	Room Rates
SERVICES Vendor: <input type="text" value="Chattanooga Choo Choo Hotel"/> Type of Service: <input type="text" value="Hotel"/> Description of Service: <input type="text" value="Overnight Accommodations"/> Default Currency: <input type="text" value="USD"/> Ex Rate: <input type="text" value="\$1.00000"/> Date Service Begins: <input type="text" value="Tue 24 Apr 2012"/> Time Service Begins: <input type="text"/> Date Service Ends: <input type="text" value="Fri 27 Apr 2012"/> Time Service Ends: <input type="text"/> Tour #: <input type="text" value="6059"/> Tour Code: <input type="text" value="GTN042412-1"/> Package #: <input type="text" value="3349"/> Tour Name: <input type="text" value="Choo Choo of Chattanooga - AAA East Central"/> Vendor #: <input type="text" value="3680"/> Price/Inv #: <input type="text" value="9822"/> PDR Category: <input type="text" value="Rooms"/>			
STATUS Date Request Sent: <input type="text"/> Vendor Confirm #: <input type="text"/> Date Contract Rec'd: <input type="text"/> Cancellation Date: <input type="text"/>			
INVENTORY Type of Inventory: <input type="text" value="None"/> Adults Booked: <input type="text"/> Rooms Booked: <input type="text"/> From Tour Master: # Pax: <input type="text" value="50"/> # Single / Double Rooms: <input type="text" value="5"/> <input type="text" value="20"/> On This Package: <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> Total Using This Vendor Product: <input type="text" value="0"/> <input type="text" value="0"/> <input type="text" value="0"/> Price Lock: <input type="text" value="1"/> # Pax Available: <input type="text" value="0"/> # Single / Double Rooms Available: <input type="text" value="0"/> <input type="text" value="0"/> # Driver: <input type="text"/> # Staff Sgl: <input type="text"/> # GL: <input type="text"/> Totals: <input type="text"/> Comps Required: <input type="text"/>			
Proposal Notes <i>Level 3 Notes - pulled from Vendor Product Library, flows forward only to Operations</i> The Chattanooga Choo Choo is the only Historic Hotels of America resort in Chattanooga, TN. The Terminal Station in Downtown Chattanooga has been converted into the most fun and beautiful of all Chattanooga hotels!			

Product Notes Pull from Package Elements into Vendor Operations Records (Level 4)

The Vendor Product Notes ultimately get pulled into a Vendor Operations record for a given Tour. Open the Detail View for an Operations record and navigate to the **Itinerary Notes** tab.

These are the Product Notes that will appear on the various reports and documents that can be generated from the Operations Module; Itinerary, Escort Notes, Driver Notes, etc. One last opportunity is available to edit as those reports compile and, again, these changes do not flow backward into the related Package Element or Vendor records.

Record 13 of 45729

Operations Details Record ID 2353

OPERATIONS INFO: Chattanooga Choo-Choo Hotel GTN042412-1

Select/View Record

- Norwegian Cruise Lines - Port Charges
- Frontier Airlines - Round Trip Airfare from Nashville to Seattle
- Country Inn & Suites-PA - Accommodations with Continental
- The Amish Experience - Amish Experience Theater
- Landis Valley Museum - Landis Valley Museum
- Sight & Sound Theatres - "Jonah" At Sight & Sound Theatre
- Sight & Sound Theatres - Dinner At Hershey Farm
- Toneworks c/o Jumpin Tyme - show at rallyard at 7pm
- American Mountain Theater - American Mountain Theater
- Chattanooga Choo-Choo Hotel - Overnight Accommodations
- Mayfield Ice Cream Factory - Mayfield Ice Cream Factory Tour
- Chattanooga Choo-Choo Hotel - Dinner at the Station House
- Chattanooga Choo-Choo Hotel - Breakfast
- Buttonwillow Church - Buttonwillow Church Civil War
- Chattanooga Choo-Choo Hotel - New Orleans Trolley Ride

CURRENT FOUND SET

VENDOR/TOUR DETAILS

Vendor	Vendor #	Pack Type	Currency	Type of Ops Rec	Inventory Type	Date Request Sent	Vendor Confirm #	Space Status
Chattanooga Choo-Choo Hotel	3680	PKG	USD	Financial	None			No Req
Tour Code	Tour Name	Description	Tour #	Start Date	End Date	Date Contract Rec'd	Cancellation Date	Rate Status
GTN042412-1	Choo Choos of Chattanooga - AAA East Central	Breakfast	6059	04/25/12	04/25/12			Est
								Record Type
								Financial

[+ Info Record](#)

Main / Notes | Inventory | Accounts Payable | Itinerary Notes | Vouchers | Vendor Contact Info | A/P Summary | Email Log | Tasks / Docs | Reports

ITINERARY NOTES

Level 4 Notes - pulled from the Package Element

Event or Place Name (for itinerary) Service Start Time Service End Time Include Vendor's Contact Info?

Breakfast Buffet at Hotel 6:30 AM ☐ Phone ☒ Description ☐ Address

Itinerary Notes (appears on group leader's and traveler's itinerary)

BREAKFAST AT THE GARDENS RESTAURANT
LOCATION: Chattanooga Choo Choo Complex

Relax in the center of lush green plants and enjoy the view of the formal gardens. The Gardens is located off the dome lobby, and is a full service restaurant open for breakfast, lunch, and dinner. You can start your morning with a delightful breakfast buffet or with a wide variety of menu items.

Breakfast Buffet to include the chef's choice of hot & cold breakfast items, assorted juices, coffee, tea, & decaf.

Escort Notes

You will need to present you breakfast voucher that you received upon arrival to the hotel.

Driver Notes

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

The Product Library & Contracted Services

Creating Products and Contracted Services

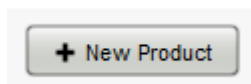
The loading of Products and Contracted Services you have with your Vendors begins here. We begin by adding a Product, which will lead us to the Product Details screen where Contracted Services can be added secondarily.

Navigate to the **Product Library** portal for a Vendor (on the **Products and Prices** tab) and you will see products you have previously created.

The screenshot shows the 'Vendor Details' screen for 'Lynne's Cruise Company'. The 'Products / Prices' tab is selected and highlighted with a red box. Below the tab, the 'Product Library' section is visible. A red box highlights the 'Product Description' column, which contains the entry 'Cruise Components'. Another red box highlights the '+ New Product' button in the top right corner of the Product Library section. The table below shows the following data:

Product Description	Date Begin	Date End	Prop Only?	# Recs	Category	
Cruise Components	01/01/23	12/31/23	<input type="radio"/>	4	BOAT	Duplicate

It might be helpful to think of the relationships in this part of the system as a series of file cabinets, each of which has multiple drawers, in which are contained all of your contracts. In the example that follows, Lynne's Cruise Line — the Vendor — is the file cabinet, and we are about to allocate and label one drawer (a Product), in which we expect to find paperwork documenting all of the reservations we have made for accommodations and meals anytime during 2022 (represented by Contracted Services). At the point we contract services for 2023, we will create — manually or via the “duplicate” process — a second Product (a second drawer), in which we will find Contracted Services (contracts) related to reservations for the new year.



To create a new Product record, click on the “+ New Product” button located mid-screen. The Vendor name auto-loads as does the Default Currency. The description you give the Product will reference the services that you are about to create at the Contracted Service level.

Add a New Product

Vendor: Default Currency:

Description (Internal - Will appear in Package lists only)*:

Date Begin*: Date End*: # Days: Category*: **Proposal Only** ☐

* Denotes Required Field

The Date Begin and Date End fields define the period of time during which the Product specified is available. The range may be as long as a year or may reflect seasonality. The “# Days” field will auto-fill. **The Category description is essential to the “Tour Duplicate” function available in Tours working properly.** That process will be explained in detail in Chapter 4.

! At this juncture, the most important thing to know is that if you have multiple Products whose dates overlap even by a single day, it is critical that they be assigned different categories. It is recommended that the category be kept simple...one word is good.

Select the “Proposal Only” button if the Contracted Service you are about to create is “generic”—perhaps the costs are estimated, and you do not actually have the service contracted with the supplier—and are needed only for purposes of being able to put together a proposal. Marking them as such will prevent them from being mistaken for the “real thing” when used in packages.

Click on the *Continue* button to proceed (as you are in the middle of a script), or on *Cancel* if you do not wish to move forward.

You are now at the point where, from within the parameters of this Product, you can create a new Contracted Services record.

[Back to Product Library](#)
[Delete Product](#)

Record 1 of 1 | ID # 33436

PRODUCT DETAILS

CURRENT VENDOR: LYNNE'S CRUISE COMPANY

Description (Internal)
Cruise Components

Category
BOAT

Default Currency
USD

Start Date: 01/01/23
End Date: 12/31/23

Proposal Only ☐

CURRENT TOUR/PKG DETAILS

Tour #
Start Date
End Date

Tour Name
End Date

Pack#
Date Begin
Date End

Package Name

CONTRACTED SERVICES

Name & Description	Start	End Date	Price	Type Service	ID#	Inv On?	Availability
<input type="button" value="Edit"/> Inside Cabin	01/02/1	09/03/23	\$1,250.00	Cruise Line	72207	No	off
<input type="button" value="Edit"/> Inside Cabin	08/28/23	09/01/23	\$1,250.00	Cruise Line	72190	No	off
<input type="button" value="Edit"/> Outside Cabin	08/28/23	09/01/23	\$2,250.00	Cruise Line	72191	No	off
<input type="button" value="Edit"/> Outside Cabin	08/30/23	09/03/23	\$2,250.00	Cruise Line	72208	No	off

Contracted Service Details

Name & Description (external - will appear on proposal)
Inside Cabin

Start Date
01/02/1

End Date
09/03/23

Start Time
End Time

Room Costs
Per Person Costs
Fixed Costs

Sing # Dbl Net Single Net Double Net Triple Net Quad

Tax Bags Occupancy Tax # Comps Level Driver Room

RM Inv Available Room Rate Room Billing

☐ Per Room ☒ Per Person
☐ Per Night ☒ Per Stay

☐ Inventory On
☒ Inventory Off
☐ Omit on Itinerary?

Print Control
☒ Esc/Drv ☒ Itin ☒ Vch ☒ Conf

Level 2 Notes - pulled from Vendor Itin & Proposal Notes tab, editable here, flows forward only to package elements

Proposal Notes (Package)

Itinerary Notes (Operations)

Escort Notes

Driver Notes
Changed from \$1500 and \$1000 nets to \$1750 and \$1250 gross in order that Ops reflects commissionable costs

Conditions & Terms (Internal)

If you want to open an EXISTING Contracted Service record, click on the **Edit** button to the left of it (as shown above) and the details will display in the lower portion of the screen. To create a new Contracted Service, click on the “+ New Contracted Service” button. For now, ignore what appears at the top left part of your screen referencing the Current Tour# and Package#. Initially, this has nothing to do with the record you are creating. At the point the record is being attached to a Package, the information that displays will be relevant.

Page 109 of 338

Contracted Service Details

Name & Description (external - will appear on proposal) Start Date End Date Start Time End Time

Inside Cabin 01/02/1 09/03/23

Room Costs		Per Person Costs		Fixed Costs	
0	0	1,750.00	1,250.00		
# Sing	# Dbl	Net Single	Net Double	Net Triple	Net Quad
		0	0.00		
		Tax	Bags	Occupancy Tax	# Comps
				Level	Driver Room
0		<input type="radio"/> Per Room <input checked="" type="radio"/> Per Person		<input type="radio"/> Per Night <input checked="" type="radio"/> Per Stay	
RM Inv	Available	Room Rate		Room Billing	

[Print Control](#)
☒ Esc/Drv ☒ Itin ☒ Vch ☒ Conf

[Back to Product Library](#) [Attach](#)
[Expand/Edit Details](#) [Duplicate](#)
☐ Inventory On
☒ Inventory Off
☐ Omit on Itinerary?
[Delete Contracted Service](#)

Looking, then, at the part of the layout labeled “Contracted Service Details,” the **Name & Description**, as you’ll note, is “external” and is what will appear on proposals and itineraries, so be clear and succinct. If you are creating a “Proposal Only” record, you might want to get in the habit of prefacing your description with the word “Proposed;” another measure that will help avoid the accidental “misinterpretation” of the record.

In the **Cost Type** field, select F, P or R (Fixed, Per Person, or Room), or let that value be set automatically upon entry on any one of the three related tabs in the record.

The **Start Date and End Date** will initially auto-load as the dates assigned in your Product Date record but can be overtyped as has been done in the example. For services like a theme park admission that remains constant all year, the year-long date range would be applicable. For a tour-related motorcoach charter, your date range will be as long as the tour. In the case of hotel accommodations, you have two choices. One is to create one record for *each overnight*; the other is to set up a date range, with the Start Date being the date of check in, and the End Date being the date of check out. The biggest factor that should drive your decision is...will every member of the traveling party be with the group every night, or does the possibility exist that some will miss a night due to late arrival or early departure? If you want to be able to eventually generate a separate roomlist for each night of the stay and not have to make any manual adjustments to the payable created for the hotel in Ops, then you will create a separate Contracted Services record for each overnight.

In cases where your service has a specific start and/or end time—a theater performance or restaurant reservation, by example—you will want to fill in the **Time Begin** and possibly also the **Time End** field.

If you want to manage inventory for a Room or Per Person service here in Vendor, you will click **Inv On**. Doing so necessitates that you then load a figure representing the quantity on hand. In our example, since we are talking about rooms, we loaded 2 (rooms) in the # Sing field and 18 in the #Dbl. Please note that inventory can be controlled for a daily/one-off service, an overnight service, or for a “stay”. You cannot set up a date range (for example January 1, 2018 through December 31, 2018) and expect to manage the inventory for *each day*. Instead, you must create a *separate* Contracted Service record for *each day* with its

own cost and inventory (easy to do using the Dupe feature, which will be addressed shortly).

✿ Note that the numbers you load can be “massaged” as needed. By example, if you max out the number of tickets booked for a given theater performance and are able to obtain additional, simply up the count. Similarly, if you release tickets back to the theater due to slow sales, you will want to adjust the number downward.

If it is not necessary to manage inventory — for a service like shuttle vouchers, by example — you will leave inventory turned off.

The button just below, **Omit on Itin?**, signals the program to not list the service in an itinerary. Items like a per-diem allowance for your tour manager’s on-the-road expenses would likely be treated this way. The cost for that service needs be included in your Package for pricing but should not show up as a “line item” in the documents your client or passenger receives.

As mentioned earlier, there are three kinds of costs that you can manage in TourTools, Fixed, Per Person, and Room. Fixed costs are those that will be shared by the entire group. Some examples are the cost of a motorcoach, or tour manager wages. Per person costs are fairly obvious; anything like a meal or a theatre ticket that will be charged on a per-person basis falls into this category. Anything that has a room component to it — hotel rooms, cabins on a ship, or a resort stay — will be loaded as Room costs. **Only one type of cost can be loaded in a single record.** To elaborate on each a bit more:

Fixed Costs

Contracted Service Details

Name & Description (external - will appear on proposal)

55-Seat Deluxe Motorcoach

Start Date

06/25/23

End Date

06/30/23

Start Time

End Time

Room Costs

Per Person Costs

Fixed Costs

\$5,000.00

Fixed Group Cost

Group Cost/Daily

0

Capacity

< Back to Product Library

Attach

Expand/Edit Details

Duplicate

☐ Inventory On

☒ Inventory Off

☐ Omit on Itinerary?

Delete Contracted Service

Print Control

☒ Esc/Drv

☒ Itin

☒ Vch

☒ Conf

Using a motorcoach charter as an example and moving across the fields of entry from left to right, the Fixed Inv field is where you can input the number of busses you have chartered for a particular tour. To accommodate the cost, you can use either the **FX Group Cost** field or the **Group Cost/Daily** field. The

difference between the two is as follows:

Example

You have contracted with a motorcoach company for an over-the-road charter for the period January 1 to 7, 2018. The cost for the week will be \$5,500. You will load that amount as a FX Group Cost, associated with a Begin Date of January 1 and an End Date of the 7th.

From the same company, you contract shuttle services on a daily basis quite frequently throughout the season. One airport-to-hotel trip costs \$250, which amount you will load as a Group Cost/Daily. The date range for this record might be January 1 through December 31, which implies that you can pull this service into any number of Packages, so long as the date of usage falls between January 1st and December 31st.

Two unique things to note about Fixed Costs: First, loading a number in the “Fixed Inv” field is simply an indication of how many of that service has been contracted and provides no inventory control. In other words, if you charter two coaches for a tour and enter “2” in the “Fixed Inv” field, there is nothing to prevent you from adding *three* coaches at the point you link the Contracted Service record to a Package.

Second, the field referencing Capacity is also not providing any inventory control. For the charter service used in our example, you might load 45 as being the number of seats on the bus. Again, this is for reference only since there’s nothing to alert you when you book more than 45 passengers on the tour using the charter. If you feel it essential to carefully watch capacity on the bus — in other words there’s no other inventoried component in your Package that will prevent exceeding the number of seats available — then consider creating what we call a “Max Pax” record, which serves specifically as a “counter”. The per person record will be dated the same as your charter record, will obviously have no cost associated with it, but will have inventory turned “on” and loaded.

Per Person Costs:

Contracted Service Details

Name & Description *(external - will appear on proposal)*

Three Course Dinner including Gratuity

Start Date

01/01/23

End Date

12/31/23

Start Time

End Time

Room Costs

PP Inventory

Available

Per Person Costs

Net Rate
Adult/Student

Net Rate
Child

Fixed Costs

Comps

Level

[< Back to Product Library](#)
[Attach](#)

☐ Inventory On
☒ Inventory Off
☐ Omit on Itinerary?

Print Control

☒ Esc/Drv
 ☒ Itin
 ☒ Vch
 ☒ Conf

Once again using theater tickets as an example, your **Begin** and **End Dates** will be the same and you may want to load the starting time of the play in the **Time Begin** field and the approximate end time in the **Time End** field. Inventory would be turned “on”, and the number of tickets you are holding would be entered in the **PP Inv** field. As mentioned earlier, if you have a block of 35 tickets, at the point you tried to sell a 36th person on the Package featuring this service, the booking would waitlist.

As bookings are made on Packages using the service, the inventory will decrement, and you will see the quantity still available in the **Avail** field.

If complimentary tickets based on sales will accrue to you from the Vendor, enter the number and the level at which you will receive them in the **#Comps** and **Level** fields. If, by example, you will earn one free ticket for every 40 sold, your entry will be 1 and 40. If you have a situation where you will earn a free ticket regardless of whether you sell 4 or 40, you will simply enter 1 in the **#Comps** field and nothing in the **Level** field.

Room Costs

Contracted Service Details

Name & Description *(external - will appear on proposal)*

Double-Double Rooms including Buffet Breakfast

Start Date

06/25/23

End Date

06/30/23

Start Time

End Time

Room Costs		Per Person Costs		Fixed Costs	
5	20	100.00	150.00	200.00	250.00
# Sing	# Dbl	Net Single	Net Double	Net Triple	Net Quad
		0	8.00	0.00	1
		Tax	Bags	Occupancy Tax	# Comps
				20	Level
					Driver Room
25	5 17	<input checked="" type="radio"/> Per Room <input type="radio"/> Per Person		<input checked="" type="radio"/> Per Night <input type="radio"/> Per Stay	
RM Inv	Available	Room Rate		Room Billing	

[Back to Product Library](#)
[Attach](#)

[Expand/Edit Details](#)
[Duplicate](#)

☒ Inventory On
☐ Inventory Off

☐ Omit on Itinerary?

[Delete Contracted Service](#)

Print Control

☒ Esc/Drv
 ☒ Itin
 ☒ Vch
 ☒ Conf

Referring to the example shown earlier, you will use the Room Costs tab when loading inventory and costs relating to the reservation of rooms with a hotel, cabins with a cruise line, or a package of arrangements with an all-inclusive resort. Note that your **End Date will always be the date of check out**, so at the very least, (as in the case of a single overnight) all of your records will have a one-day difference in the Begin and End fields. In the Inv fields, you will load the number of single and double rooms booked, if you have checked “Inv On”. Note that any Bookings eventually made on a triple or quad occupancy basis will draw from the inventory loaded in the **# Dbl** field; only singles will decrement the number loaded in the **# Sing** field. The total number of rooms loaded in the record will appear in the lower left corner, adjacent to the **Avail** field, which—as Bookings accrue—will reflect what is still available.

The next four fields are for input of the single, double, triple and quad room costs. In the **Tax** field, load a

decimal figure representing the tax rate, if applicable. In the field labeled **Bags**, load the per-person cost for baggage handling (obviously, if you create separate records for each individual night, only one should contain the baggage handling fee; or, consider the possibility of creating a Contracted Service for *just* the cost of portage in and out). In the last field, **Occupancy Tax**, load a dollar amount representing any occupancy tax on the room. On the far right is a field to indicate the **#Comps** and **Level**. Your input here should be indicative of how many rooms will be comped for how many rooms sold.

Finally, if you are responsible for the cost of the driver's room on tour and the hotel offers a special rate for same, enter the amount in the last field, **Driver Room Rate**.

On the next line, identify the "billing structure". You'll note the choices are to bill per person or per room, and per night or per stay.

Note: When the "driver room" rate is considered for pricing in Package, it will be subject to the same tax rates as indicated in the line above, so both entries should be net amounts. Also, when you specify that the costs are "per stay", the occupancy tax should likewise be for the stay, as should the cost for the driver's room.



Two very important things to be aware of when it comes to **Contracted Services** records, once they are linked to a Package: (1) if you have a specifically dated record, like a hotel overnight, you cannot change the start or end date, and (2) inventory control cannot be toggled on or off.

Navigational Buttons

Clicking on the **< Back to Product Library** button will return you to the Product and Prices tab in the record.

Use the **Attach** button to attach Vendor records to Packages. Chapter 5 will explain the process in detail.

The **Duplicate** button (process) will save you an immeasurable amount of time in setting up records that are similar or identical to records that already exist. To use, position yourself within the record you want to copy, and click on the button. You will be asked whether you want to make a single copy of the record or if you want to replicate a range. If you choose the first, an exact duplicate of the original record will be created, the dates and possibly other details of which you will need to alter. If you pick the latter, this screen will present:

Duplicate a Price Inventory Record Within a Date Range

Enter the first date and the last date for the range of records you wish to create.

To continue, click **CONTINUE**.

<p style="text-align: center;">Begin Duplicate Date</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">4/8/2018</div> <p style="font-size: small;">First date of new record range</p>	<p style="text-align: center;">Vendor Date Record</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Rooms and Meals</div> <p style="font-size: small;">Price Inventory Element Description</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Mon, Jan 01, 2018</div> <p style="font-size: small;">Date Begin</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Mon, Dec 31, 2018</div> <p style="font-size: small;">Date End</p>	<p style="text-align: center;">Vendor Price Inventory Record</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Ocean View Rooms, including Breakfast</div> <p style="font-size: small;">Price Inventory Element Description</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Sat, Apr 07, 2018</div> <p style="font-size: small;">Date Begin</p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Sun, Apr 08, 2018</div> <p style="font-size: small;">Date End</p>
--	--	---

In the center of the layout, the Product record description and date range is referenced. To the right of that is a reconfirmation of the description and the date of the Contracted Service record you are copying.

Initially, the white fields to the left will display, in the **First Date** field, the day *following* the service being copied — in this case, April 8th — all the way to the last date of your product date record, December 31st. What you will want to do is edit the **End Duplicate Date** to show instead the check-out date for your *last* record, let's say, April 10th. In this example, clicking on the Continue button will create two new records; one for an overnight on the 8th and one for the 9th.

Use the **Delete** button if the record is not needed. Note, however, that you will be thwarted in its removal if it has been attached to a Package.

Clicking on the **Details** button will present a multi-tabbed layout, the top half of which looks like this:

Edit Contracted Service Details

Edit				Report			
VenEID#	Vendor#	VenEI#	Cost Type	Type Service			
<input type="text" value="72178"/>	<input type="text" value="4702"/>	<input type="text" value="33425"/>	<input type="text" value="R"/>	<input type="text" value="Hotel"/>			
Vendor Name			Product Category	Destination			
<input type="text" value="JW Marriott Hotel"/>			<input type="text"/>	<input type="text"/>			
Description			gVenEI#Orig	Currency			
<input type="text" value="Double-Double Rooms including Buffet Breakfast"/>			<input type="text"/>	<input type="text" value="USD"/>			
Start.Date	Time Begin		Inv On <input checked="" type="radio"/>	Inv Test			
<input type="text" value="6/25/2023"/>	<input type="text"/>		Inv Off <input type="radio"/>	<input type="text" value="25"/>			
End.Date	Time End		Proposal Only <input type="radio"/>	Service Status			
<input type="text" value="6/30/2023"/>	<input type="text"/>			<input type="text" value="No Req"/>			
	Inventory	Sold		Rate Status			
Inv PP	<input type="text" value="0"/>	<input type="text" value="0"/>		<input type="text" value="Est"/>			
# Sing Req	<input type="text" value="5"/>	<input type="text" value="0"/>		Price Last Updated			
# Dbls Req	<input type="text" value="20"/>	<input type="text" value="3"/>		Request Sent Date			
Fixed Inv	<input type="text" value="0"/>	<input type="text" value="0"/>	Capacity	Ven Confirm Date			
	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	Ven Confirm #			
				CXL Date			

Linked Packages Actual

Package Name	Tour Name	Tour#	Pack#	Tour Status	# Rm	# PAX
Core Package	Explore Grand Rapids	18575	15926	Active	3	0
Tour Manager Package	Explore Grand Rapids	18575	15928	Active		0
Driver Package	Explore Grand Rapids	18575	15932	Active		0
Group Leader Package	Explore Grand Rapids	18575	15933	Active		0

Linked Ops Records Tour Limit

Tour Name	PAX	RM	A/P Tot (Conv)	Tot Pmts	Bal Due
Explore Grand Rapids	18575	52	31	\$766.00	\$766.00

Much of what displays on the **Edit** tab are details from the Contracted Service record. For point of reference, the field labeled VenEID# is the number assigned to the Contracted Service record; the Vendor# is obvious; the VenEI# is the Product record's ID number.

The fields in the lower right are reserved for input of dates on which you may have updated the costs in the record (process explained on the next page), sent a request for service to the vendor, received a confirmation of the request from the vendor, any pertinent confirmation or contract numbers, or the date on which you requested cancellation of the service.

From the **Report** tab, you are able to run a "Vendor Status List", reflecting the details of the Contracted Service records, including what's been inventoried, what's still available, and how many Packages are using the product.

At the bottom of the layout, there are two panes, one labeled “Package Elements Linked Records” where you are able to reference which Package(s) this record has been attached to. The lower section of the screen references the Operations records that are linked to the Contracted Service record.

Package Elements Linked Records
Actual

Package Name	Tour Name	Tour#	Pack#	Tour Status	# Rm	# PAX
Optional Post-Cruise Miami Overnight	Cruise to Jamaica	6442	13942	Active	0	0

Operations Linked Records
TM Limit

Tour Name	PAX	RM	A/P Tot (Conv)	Tot Pmts	Bal Due
Cruise to Jamaica	6442	40	37	\$0.00	\$0.00

Print Control
☐ Esc/Drv
 ☐ Itin
 ☐ Vch
 ☐ Conf
 Update Package Prices

The two remaining areas at the bottom of your Contracted Service record are the **Print Control** check boxes and the **Update Package Prices** button. The check boxes are used to indicate whether you want the particular Contracted Service to be represented on the print document specified. If it's something not appropriate to be included in the itinerary that will be provided to your travelers, by example, then that box would not be checked. Note that this choice also presents in Ops.

The Update Package Prices button can be used if there is a price change that needs to be considered as “global”, in other words needs to be changed in **every Package** to which it's been linked. When you use this functionality, the cost reflected in each Package will be changed, but you will have to manually update the Package pricing and, if the effect is significant, re-publish all of them.

Generally speaking, it will usually make better sense to individually address price updates on a Package by Package basis, process explained next.

Managing Contracted Service Price Changes

When the cost of a service represented in the Contracted Service record changes *after* it has been attached to a Package and you want to see its effect on the net price, open up the Contracted Service record and change the cost. From the Itinerary tab in the Package, open the

Price Update



Package Element and click on the “Update Prices” button. Doing so will update the cost in the Package Element (after which, if the effect is significant, you may want to re-price and re-publish the Package). As you wish, use the **Price Update** field at the top of the Contracted Service record to “date stamp” the price change.

PRICE INVENTORY ELEMENT NOTES

This is the best place to stay on the island, rated five star by most online booking sites.

Proposal / Voucher Notes

The hotel has three restaurants, two pools, and the best looking cabana boys anywhere in the world.

Itinerary Notes

Call the hotel at least half an hour prior to arrival as they like to welcome the group with tropical drinks.

Escort Notes

Parking is available right behind the hotel.

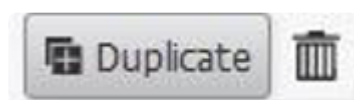
Driver Notes

Conditions Terms

PAX Instructions

Notes

With a Contracted Service record open, notice the area to the right where you’ll see a series of notes fields. The notes resident at the Vendor level will automatically copy here and may require no editing. If there is something unique to the record you have open, simply make the changes. Any updates made at this level do not affect your *original* notes, and these descriptions are what you will see when generating a Proposal or Itinerary from the Package and/or Ops parts of the system.



Two more buttons to look at here in Vendor are found adjacent to the Product records listed in the portal on the Product and Prices tab. Clicking on the “Duplicate” button will step you through a process whereby you can copy all of the Contracted Service records contained within the Product record to another Vendor or—more likely—to the same Vendor but for a new year. Since the new records will be exact copies, you may have to edit the prices, but if you tend to purchase the same product from the Vendor from one year to the next, this functionality can save you a lot of time.

The small trash can icon to the far right is used to delete the Product record *and all related Contracted Service records contained within*. This script is also password dependent, and won't work if the Contracted Services records have been linked to Packages.

DEMO: Duplication in Vendor

We will be updating this video to demo the process in v5 instead of v4 – but the process is very similar!

NOTE: In TourTools v4, Contracted Services were called “Price Inventory Records”.

The screenshot displays the 'VENDOR DETAILS' screen in TourTools v4. The interface is divided into several sections:

- Top Navigation Bar:** Contains icons for Home, Clients, Tour Master, Vendors, Packages, Bookings, Openings, Quick Books, Reports, and Settings.
- Vendor Details Section:**
 - CURRENT VENDOR:** Displays 'Jeffery Cash Museum' with fields for Vendor, Description (Internal), Date Begin, Date End, SALES, and Category.
 - CURRENT TOUR# & PACKAGE#:** Shows details for two tours, including Tour #, Tour Name, Start Date, End Date, Package #, and Package Name.
- Price Inventory Records:** A table listing tour group admissions with columns for Name & Description, Start Date, End Date, Type Service, ID#, Inv On, and Availability.
- Price Inventory Entry:** A form for adding new records, including fields for Name & Description, Price Update, Cost Type, Start Date, End Date, Type Service, and various cost breakdowns (Room Costs, Per Person Costs, Fixed Costs).
- PRICE INVENTORY ELEMENT NOTES:** A section for adding notes related to the price inventory elements.

The bottom status bar indicates the date 'Wed, Sep 2, 2020' and a welcome message 'Welcome, Amy Spear, CT15!'.

<https://player.vimeo.com/video/660231013>

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Using “Set Pricing” with Restaurant Service Only

This functionality allows you to account for services on which you are going to receive a commission from the Vendor. Such costs will be exempted from the margin of profit assigned at the point the Package the service is part of is priced. In other words, all services but the SET will be impacted by that % of margin; the profit on the SET services will come later, when the commission is essentially deducted from payment made to the Vendor or is retroactively paid by the supplier.

Following the instructions as included in the manual, in this example we created a P/I record for a lunch, input as a NET cost of \$10. On the SET tab, the cost shows as \$15 (we over looked the % and simply entered a flat amount, which is fine).

Price Inventory Entry

Name & Description (External - will appear on Proposal): Four Course Dinner

Price Update: [Calendar Icon]

Cost Type: P

Start Date: Fri 1 Jan 21

End Date: Fri 31 Dec 21

Type: Res

Room Costs **Per Person Costs** **Fixed Costs**

PP Inv: 0 Available: 0 **Net Rate Adult/Student: \$10.00** Net Rate Child: [Empty] # Comps: [Empty] Level: [Empty]

I.D. #: 45002

☐ Inv On

☒ Inv Off

GRP: [Empty] Pricing: 0 Comm: .20 Margin: [Empty] Cost Factor: 10

Escort: [Empty] Driver: [Empty] GL: [Empty] Apply Comps At: Package

Comps To Budget in PackEI: [Empty] Level: [Empty] Pkg Comp PP: \$0.00

PACKAGE PRICE IN

Price & Publish: ☒ Yes ☐ No ☒ Yes ☐ No ☐ Yes ☒ No

	Single	Double/Opt	Triple
Sell Prices	\$15.00	\$15.00	
Net	\$10.00	\$10.00	
Profit & Comm	\$5.00	\$5.00	
Margin	33.33%	33.33%	

To keep the illustration simple, the Package created consists of only the lunch. When the Contracted Services record was added to the Package, SET pricing was chosen.

When the Package was priced, the Margin was set at .20, but as can be seen, that has been ignored. Instead, a profit margin of \$5 has been calculated; equal to the commission you are going to earn at the time lunch arrangements are finalized and paid for.

Please be aware that the NET figure is what will be reflected in the Ops record.

Room Expenses		Per Person	
PAX			
1	10.00	0.00	
Qty	PP Rate	AP PP Adu	
		0	0
#PAX	Manual Adj	Comp PP	Adjusted Total

If you are required to pay the gross and retroactively receive your commission, you can simply post a gross payment which will be more than the amount shown as due, or by using the “Misc Cost” field you can actually increase the cost to match your payment. After remitting payment, remind yourself to watch for the commission due you. Most definitely create a To Do reminder from the Ops record, and eliminate or adjust what you entered as the “Misc Cost” such that the A/P will now show as a negative.

✳ TO BE SURE, DO NOT USE THE NET/SET PRICING IN REVERSE, I.E BY ENTERING THE GROSS AMOUNT AS THE NET AND THE NET AMOUNT AS THE SET. THE RESULT OF DOING SO (IN THIS EXAMPLE) WOULD BE TO REFLECT \$15 AS YOUR NET COST, A SELLING COST OF \$10, AND A NEGATIVE PROFIT. GIVEN THE OPS RECORD WILL REFLECT \$10, YOU WILL HAVE ESSENTIALLY GIVEN AWAY ANY AND ALL PROFIT ON THE SERVICE IN QUESTION.

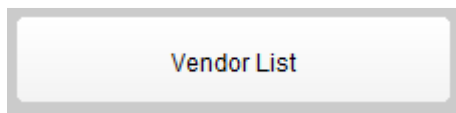
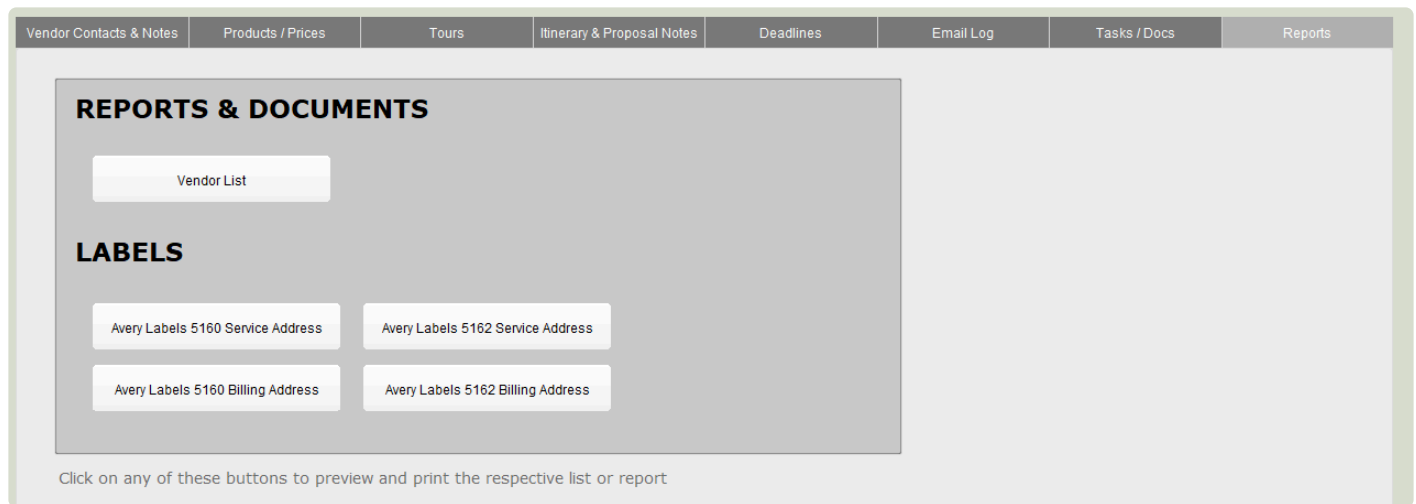
Price & Publish <input checked="" type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> Yes <input type="radio"/> No		
	Single	Double/Opt
Sell Prices	\$10.00	\$10.00
Net	\$15.00	\$15.00
Profit & Comm	\$-5.00	\$-5.00
Margin	-50.00%	-50.00%

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Vendor Reports & Docs

There are a few pre-built reports/options that come included with the Vendor module. You can add as many custom reports, docs, and lists as you'd like. Contact TourTools support if you have something in mind, we can build it for you quickly.



This report compiles all of your vendors into one list, including their contact information and the type of service they provide.

Use the label buttons to output labels for mailings.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Chapter 4: Tours

The Tours Module – Optimize Your Tour Building Workflow

Before starting, let's examine the relationship between Tours and Packages.

Tours contain an unlimited number of Packages (itineraries) and store the details related to payment deadlines, cancellation penalties, bus departure and return points, and group air segments.



For every departure you have scheduled you will have a Tour record and linked to that record you will have at least one and probably more Packages—the Package being the repository for all the Vendor services that are included in the itinerary.

Using a cruise as an example, you will create a Tour record that will reflect the departure and return dates, the ship, etc. Next, you will create Packages to represent the various cabins and costs: Category A at \$1,000, Category B at \$1,200 and Category C at \$1,400. When you eventually begin to take reservations for the cruise, the Tour will be selected first and then a *Package* will be selected, in order to assign a specific deck category to the traveler.

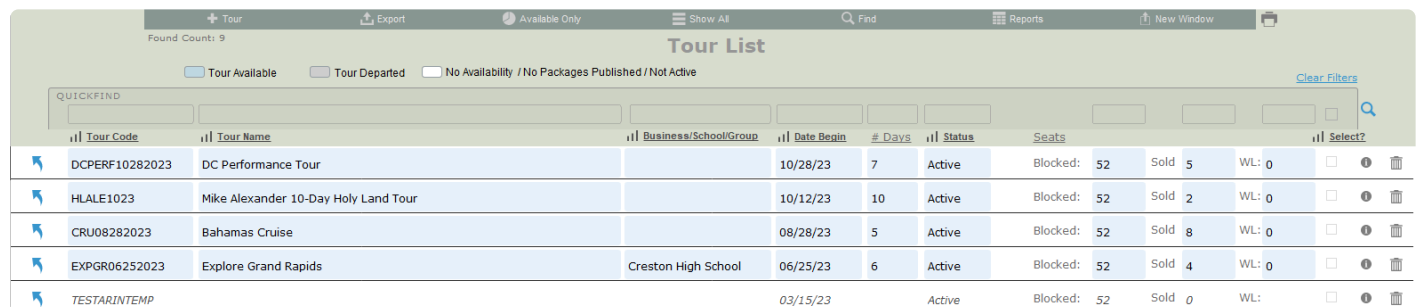
Last modified: March 27, 2023

Tours Module – List View

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

The Tours List View allows you to see, at a glance, all of the Tour records in the current found set. You will see that the listing features color coding, some of which is triggered by availability, some of which is based on departure dates.

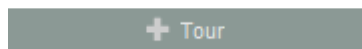


Tour Code	Tour Name	Business/School/Group	Date Begin	# Days	Status	Seats	Select?
DCPERF10282023	DC Performance Tour		10/28/23	7	Active	Blocked: 52 Sold 5 WL: 0	<input type="checkbox"/>
HLAE1023	Mike Alexander 10-Day Holy Land Tour		10/12/23	10	Active	Blocked: 52 Sold 2 WL: 0	<input type="checkbox"/>
CRU08282023	Bahamas Cruise		08/28/23	5	Active	Blocked: 52 Sold 8 WL: 0	<input type="checkbox"/>
EXPGR06252023	Explore Grand Rapids	Creston High School	06/25/23	6	Active	Blocked: 52 Sold 4 WL: 0	<input type="checkbox"/>
TESTARINTEMP			03/15/23		Active	Blocked: 52 Sold 0 WL: 0	<input type="checkbox"/>

Feature Buttons

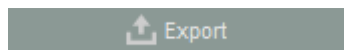
In the thin green/gray button bar we call the Feature Bar (just below the Module Navigation bar) at the top of this screen, you will find access to various scripted functionality related to the list.

+ Tour



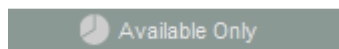
Use this button to add a new Tour record to your system.

Export



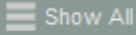
Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

Available Only



This is a button that will filter the Tour list to show only upcoming Tours with availability.

Show All



Eliminates any filters you have on your list and shows all Tours. This button only shows when you are in a found set and NOT viewing all records.

Find



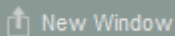
You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen. When you are ready to initiate the process, click on the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

Reports



Clicking this button will bring you to the Tour Reports tab.

New Window



Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Tours Module – Detail View

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Tour.

Tour Details Record ID 18582

TOUR INFO: DC Performance Tour **DCPERF10282023**

Select/View Tour

- DCPERF10282023 - DC Performance Tour ACTIVE
- HLALE1023 - Mike Alexander 10-Day Holy Land Tour ACTIVE
- CRU08282023 - Bahamas Cruise ACTIVE
- EXPGR06252023 - Explore Grand Rapids ACTIVE
- TESTARINTEMP - ACTIVE
- PROPMIKE - Mike Explores Grand Rapids PROPOSAL
- PROPOSAL - Fred Explores Grand Rapids PROPOSAL
- 1234TEST - test proposal PROPOSAL
- 1325BAHAMAS - Bahamas Cruise PROPOSAL

Tour Code: DCPERF10282023 **Name:** DC Performance Tour **Start Date:** 10/28/23 **Days:** 7 **End Date:** 11/03/23 **Nights:** 6 **Tour Status:** Active **Res Status:** Avail

Tour Type: Performance **Destination:** Washington DC **Closed:** ☐ **Tour #:** 18582 **Load Factor:** 9.6% **Trip Type:** MultiDay **Guarantee:** ☐ Yes ☐ No **Default Bus Size:** 47

Main / Notes | Prices / Avail | Pay Deadlines | Cruises | Groups | Buses | Flights | Meals | TourTools Online | Email Log | Tasks / Docs | Reports

NUMBER OF SEATS (numbers loaded in DRIVER, STAFF, and GL fields carry over to the package)

Passengers	Driver(s)	Staff Sgl	GL Dbl	Total
Blocked 52				52
Booked 5				5

NUMBER OF ROOMS

Single	Double	Triple	Quad	Total
Blocked 5	25	1		31
Utilized 1	1.5	0		2.5

FACTORS / #PAX

Cost Factor	Quote Factor	Account Manager	Travel Counselor

CLIENT Business/School/Group: (Client #) **Assign Client Ownership**

Estimated Allocated Booked Available

DIVISIONS **Assign Divisions**

TOUR NOTES Tour Notes (Internal Use Only) Enter note here & click the pencil button to the right to save

Feature Buttons

List View **+ Tour** **+ Package**

List View

Use this button to return to the Tours List View.

+ Tour

Use this button to begin the process of adding a new Tour to your system.

+ Package

Use this button to begin the process of creating a Package to attach to this Tour.

Duplicate Tour **Cancel Tour** **eBlast**

Duplicate Tour

Use this button to initiate the duplication process for this specific Tour. You must first set the **Tour Status** of

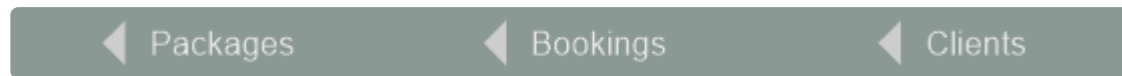
the Tour you want to duplicate to “Template”. Click on this link to jump to the section below related to [Duplicating a Tour](#).

Cancel Tour

Use this button to begin the cancellation process for this “-Tour.

eBlast

This button is the gateway to creating an eBlast or marketing campaign to a target either Tour PAX, Tour Vendors, or Tour Hotels. Click this link to see complete details on using the [TourTools eBlast Feature](#) in Chapter 1.



< Packages

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Packages module and show all packages attached to this Tour.

< Bookings

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Bookings module and show all bookings made on this Tour.

< Client

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Clients module and show all Clients associated with this Tour.



< Ops

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Vendor Ops records associated with this Tour.

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields that are not available on the current screen.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Tour Details Layout

To keep things simple, we're going to address first of all the information seen on the top half of the Tour record. After that, we'll go tab by tab through the bottom section.

Most of the fields are obvious as to the content.

Guaranteed is a "yes/no" indicator of whether the tour will operate regardless of booking activity or any other factor.

As there is booking activity on the tour, a percentage representing the number of active bookings as compared to the anticipated Number of Seats will appear as a percentage in the field labeled **Load Factor**.

Trip Type is a value list used to indicate if the trip is single or multi day.

Closed is another "yes/no" indicator of whether the trip is open to the general public or is restricted to a closed group.

The field labeled **Tour Status** will automatically be set to **Active** when a Tour record is created. Use the "Hold" value to temporarily stop-sell a tour; "Non-Op" will be auto-loaded at the point you cancel a tour; "Lost" will be indicative of a lost sale; "Proposal" is the designation for Tour records that have been created for purposes of making a Proposal; and "Template" is the value to set when you want to duplicate the Tour record. **Note: The tour code is what you pick initially when making a Booking, and the only ones that will present are those for Tours marked "Active" that are still to travel, i.e. departing later than**

“today”.

Res Status displays “Avail” until less than 10 days prior to departure, at which point it will revert to “Call”.

Note: This field is for reference only and a “Call” status does not prevent a booking being made within that time frame.

Invoice Type is simply an indication of whether invoicing for the tour will be direct to the passengers (Pax) or go via their Group Leader (GL).

Main / Notes Tab

The screenshot shows the 'Main / Notes' tab in the TourTools v5 interface. The top navigation bar includes tabs for Main / Notes, Prices / Avail, Pay Deadlines, Cruises, Groups, Buses, Flights, Meals, TourTools Online, Email Log, Tasks / Docs, and Reports. The main content area is divided into several sections:

- NUMBER OF SEATS:** Includes fields for Passengers (Blocked: 52, Booked: 5), Driver(s), Staff Sgl, GL Dbl, and Total (52, 5). A 'TM to Control Inventory?' section has radio buttons for 'No' and 'Yes', and a 'WL PAX' field with a value of 0.
- NUMBER OF ROOMS:** Includes fields for Single (Blocked: 5, Utilized: 1), Double (25, 1.5), Triple (1, 0), Quad, and Total (31, 2.5).
- FACTORS / #PAX:** Includes fields for Cost Factor (50), Quote Factor (50), Account Manager (Lynne Stolk), Travel Counselor (Lynne Stolk), Program Designer (Lynne Stolk), and Operations Officer (Lynne Stolk).
- AUTOMATED EMAIL BLOCKING:** Includes a section for 'BLOCKING OPTIONS [all bookings on tour]' and a 'Block Auto Emails?' section with radio buttons for 'Yes' and 'No' for Payment Reminder, Late Payment Notice, and Medical Form Reminder.
- INSURANCE SELECT:** Includes a 'REMOVE INSURANCE' link and a dropdown menu for 'USA'.
- CLIENT:** Includes a 'Business/School/Group:' field, a 'Client #' field, and buttons for 'Assign Client Ownership' and 'Assign Divisions'.
- DIVISIONS:** Includes a 'Divisions for This Tour' dropdown menu.
- TOUR NOTES:** Includes a 'Tour Notes (Internal Use Only)' section with a text area and a pencil icon for editing.
- CONFIRMED GUIDES:** Includes a 'Manage Guides' button and a table with columns for Guide Name, Type, Phone Number, and Email Address.

Number of Seats and Number of Rooms

In the **Blocked** fields, enter the maximum number of **Passengers**, **Driver(s)**, **Staff Singles** and **GL Doubles** you anticipate and can accommodate on this Tour. When you begin making bookings, the gray **Utilized** fields will reflect the actual number of participants by type that have been booked.



If you enter numbers in the Driver(s), Staff Singles and/or GL Doubles fields, those numbers may, dependent on business rules set up for your company, populate the fields representative of the number of “comps” you need to allow for when linking Vendor services

to Packages. The two methods of linking Contracted Services to Package itineraries are explained in detail in Chapter 5 and will help you determine if you want to make an entry now or after the Package is complete and has been priced.

Just below, enter numbers reflective of the rooms you anticipate filling. Eventually, the **Utilized** fields will populate in the same way.

NUMBER OF SEATS					Tours to Control Inventory?
	Passengers	Driver(s)	Staff Sgl	GL Dbl	Total
Blocked	52				52
Booked	4				4
					WL PAX
					0

(numbers loaded in DRIVER, STAFF, and GL fields carry over to the package)

☒ No
☐ Yes

NUMBER OF ROOMS					
	Single	Double	Triple	Quad	Total
Blocked	5	25	1		31
Utilized	0	2	0		2

FACTORS / #PAX			
Cost Factor	Quote Factor	Account Manager	Travel Counselor
30	30	Lynne Stolk	Lynne Stolk
		Program Designer	Operations Officer
		Lynne Stolk	Lynne Stolk

* The figures you enter in the Number of Seats fields will provide inventory control, if you set Tours to control inventory. In other words, if 40 is showing as the Total (number of seats), adding together what you've allocated for Passengers, Drivers and Staff; your 41st booking will waitlist.

Inventory Control

A few words about inventory control in TourTools.

Tours to Control Inventory?

☒ No

☐ Yes

By default, the question of “Tours to Control Inventory?” here in Tours is set to “No.” Left at that, control resides with the various Contracted Service (C/S) records from Vendor that have been linked to Packages related to the Tour in question. Whichever inventoried service that is depleted first will cause a Booking to waitlist.

The alternate choice to control or limit the number of passengers on the Tour is to change that value to “Yes” and let control be dependent on the figures you enter in the Number of Seats fields. In other words, if 40 shows at the Total (number of seats), adding together what has been allocated for Passengers, Drivers and Staff; the 41st Booking will waitlist.

Finally, be aware that if nothing at the Vendor level has been inventoried and the question of whether Tours is controlling inventory has been left at “No,” the Total (number of seat) will nevertheless assume control. To be sure, it is the passenger numbers that are being considered; the room numbers are purely for reference.

If Tours is controlling inventory, any inventory settings at the Vendor level are ignored, meaning a particular Vendor C/S may be oversold and reflect negative availability.

If Tours is NOT set to control inventory, again, control is at the Vendor C/S level, in which case the Number of Seats can actually be exceeded. When a motorcoach is involved, it is suggested a ‘Max Pax’ record be created to inventory the total number of seats on the motorcoach.

Factors / Pax

In the area labeled “Factors, #Pax”, the **Cost Factor** field reflects the number of travelers the tour cost is based on. In the adjacent **Quote Factor** field, input the number that you want reflected on the proposal. The numbers may be one and the same, or you may want to indicate a *higher* Quote figure to give yourself some “wiggle room” to absorb any fluctuations in the price that might occur between the time the trip was priced and put into promotion, and the time it actually operates.

FACTORS / #PAX			
Cost Factor	Quote Factor	Account Manager	Travel Counselor
30	35	Arin Preston	Lynne Stolk
		Program Designer	Operations Officer
		Marcie Vargo	Tammie Williams

Account Manager/Travel Counselor/Program Designer/Operations Officer: These four fields are linked to the staff names value list and represent who will be handling different aspects of tour development. Use as necessary – we can re-label the fields as needed to represent various roles held for a Tour.

Client Ownership

CLIENT		Assign Client Ownership
Business/School/Group: Creston High School		
Susan Smith Creston High School (Client #150504)		
<u>Estimated</u>	<u>Allocated</u>	<u>Booked</u> <u>Available</u>
*Does not include Escort or Driver		Group Details

Let's look at a couple of fields and functions that have to do with referencing "ownership" of a part of or an entire departure by a group leader or "re-seller".

To begin, click the button labeled **Assign Client Ownership**. This will step you through the process of finding and selecting the Client record of the Group Leader promoting the trip to the Tour.

Use the second button, labeled **Group Details** when more than one Group Leader is selling into the trip. Having done so, you will be presented with this layout which can be completed.

Connect New Group Leader

Full Name

TourName

Tour Begins

Tour Ends

Number of Seats (load Driver and Staff fields to set Comps)

Blocked	<input type="text" value="52"/>	<input type="text" value="1"/>	<input type="text" value="1"/>	<input type="text"/>	<input style="background-color: #00a0e3; color: white;" type="text" value="54"/>	<input type="text"/>
Utilized	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Passengers	Driver(s)	Staff Sgls	Staff Dbls	Total	WL PAX

Total For Tour - Allocations subtracted from Total Blocked yields Available

Estimates

Allocations

Available

Estimate

Allocation

Booked

Available

Date of Update

Group Name

Party Name

Group Web Code

If you change the web code for this group, all packages to which it is assigned will receive the updated web code.

Packages Associated with Washington, DC	Begin Date	End Date	Published?	Web Code	Delete Web Code

The top part of the screen will reflect details about the tour name, date, and seat totals; and at the bottom, in the fields highlighted in red, you will enter the number of seats estimated to be used by the group. The field highlighted in yellow will eventually reflect how many bookings attributable to the group leader have actually been made, and in the field highlighted in blue you will see an indication of how many of those seats are still available. Clicking on the button labeled “Update” will load today’s date in the “Date of Update” field.

Note that it is possible to associate more than one GL with a Tour. As you do so, they will appear on the **Groups** tab (and the very first one you add will be stamped on the **Main** tab of the Tour, as above and below). Any time you want to adjust the numbers or otherwise peek at the details of the re-seller’s record, click on the up-arrow button to the left of the Group Name. Should any one of the GL’s drop out of the tour promotion, you can disassociate them from the Tour by opening their record and using the “Delete” button you’ll see at the top of the layout. **Note: It is important to realize that this process does not protect seats for any of your promoters, it is simply a reference as to “promises made”. If you want to actually take seats out of inventory, you will want to set up a GL Booking record (covered in Chapter**

7).

CLIENT

Assign Client Ownership

Business/School/Group: **Creston High School**

Susan Smith Creston High School (Client #150504)

Estimated Allocated Booked Available

**Does not include Escort or Driver*

Group Details

Back on the main Detail

View of the Tour, you are able to reference the number of GL's associated with the trip, and the *total* of seats have been estimated and allocated.

Divisions

DIVISIONS

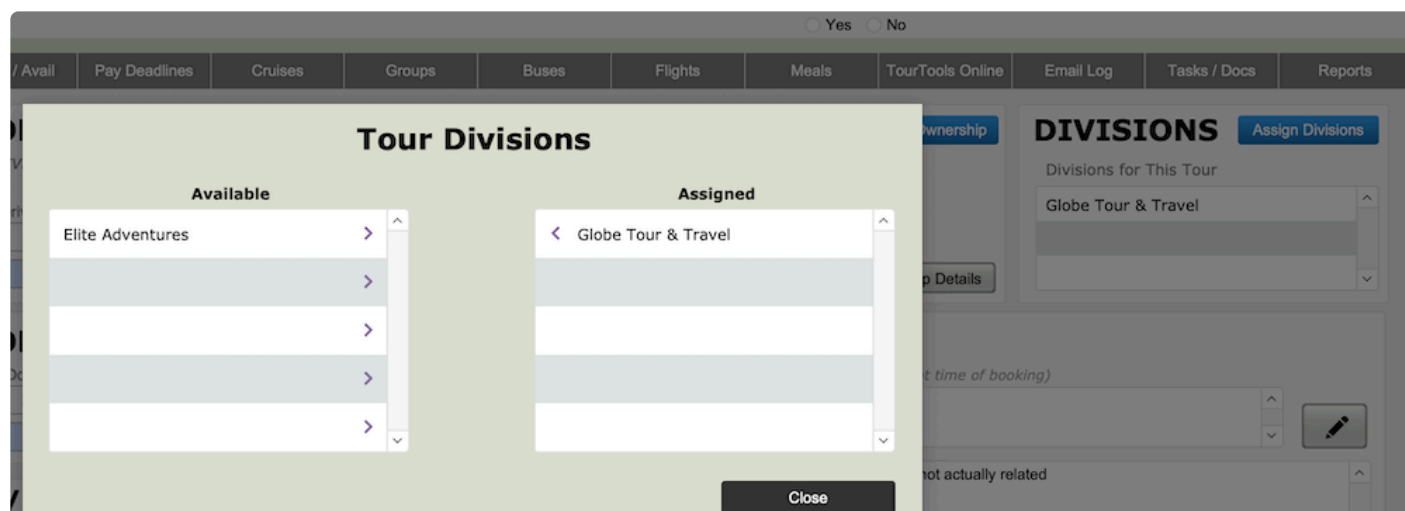
Assign Divisions

Divisions for This Tour

Globe Tour & Travel

If your company has multiple divisions or brands, it is possible to have the name, address, contact information—even logo, as needed—for each one loaded in TourTools. In the **Division** field, pick from the values that present to identify the “banner” under which the tour will operate.

- ✿ Any document that includes a logo, address, and contact information—invoices, receipts, statements, etc.—will reflect details representative of the division selected.



Click on this link to jump back to the details about [Setting Up Multiple Divisions](#) for your TourTools system in Chapter 1.

Confirmed Guides

CONFIRMED GUIDES

Manage Guides

Guide Name	Type	Phone Number	Email Address	
Don Sullivan	Step-On	(555) 666-7777	don1968@gmail.com	✉️ 🗑️
Add tour notes here				⬆️ ⬆️
				🗑️
Add tour notes here				⬆️ ⬆️

This area allows you to assign Guides for the Tour and creates an opportunity for reporting on Guides and their activity/availability. This information can also be added to documents, as desired, to provide Guide contact details to your travelers.

Guides are added to your TourTools system much like Staff members – to add a guide navigate to **Settings > Business Settings > Guides**.

Tour Notes

This area is for notes about the tour, **especially notes you want the reservations staff to see when they make bookings**. For instance, if you need to ask for special information — such as a meal choice or whether the traveler has a current passport — when taking a booking, this is a good place to put that reminder.

TOUR NOTES

Tour Notes *(Internal use only; shown to reservations staff at time of booking)*

Enter note here & click the pencil button to the right to save



11/27/2022 11:19:54 AM Developer: Be sure to ask for meal selections at time of booking

Prices / Avail Tab

Main / Notes	Prices / Avail	Pay Deadlines	Cruises	Groups	Buses	Flights	Meals	TourTools Online	Email Log	Tasks / Docs	Reports
PACKAGE / OPTION DISPLAY Pricing Model: <input type="text" value="GRP"/> Package Count: <input type="text" value="4"/> <input type="radio"/> DRVR <input checked="" type="radio"/> PKG <input type="radio"/> STF_SNG								QUICKBOOKS CONNECT INFO QB Job #: <input type="text" value="18575"/> QB Job ID #: <input type="text"/>			
PUBLISHED PACKAGES											
Description	Pric	Res	Date Begin	Date End	Inv Blk	Sold	Sts Av.	Sgl Av.	Dbl Av.		
Core Package	\$781.00	Single	Sun 25 Jun 23	Fri 30 Jun 23				5			
Core Package	\$625.00	Double	Sun 25 Jun 23	Fri 30 Jun 23		6			19		
Core Package	\$573.00	Triple	Sun 25 Jun 23	Fri 30 Jun 23					19		
Core Package	\$547.00	Quad	Sun 25 Jun 23	Fri 30 Jun 23					19		

Once you publish a Package or Packages (explained in [Chapter 5](#)), their iterations will be visible on this screen. In this example, the four listed are type “PKG” and priced for single, double, triple, and quad.

If the Package contains Contracted Service records inventoried on a per person level, you will see a reflection of the lowest number of inventoried product reflected in the column labeled “Inv Blk”. The “Sold” column adjacent will show the total sold, and the **Sts Av.** column reflects the number still available. When there are inventoried rooms in the Package, you see the lowest inventoried record represented in the **Sgl Av.** and **Dbl Av.** columns.

Pay Deadlines Tab

Main / Notes	Prices / Avail	Pay Deadlines	Cruises	Groups	Buses	Flights	Meals	TourTools Online	Email Log	Tasks / Docs	Reports
DEADLINES											
Tour Defaults Load at Entry of Tour Start Date Manage Defaults											
Deposit Date	Days Til	Prior	Amount	PP/PG							
Deposit Date			Amount	PP/PG							
					1st CXL Penalty Date Days Prior Amount \$150.00						
					2nd CXL Penalty Date Days Prior Amount 100.00%						
					3rd CXL Penalty Date Days Prior Amount						
					4th CXL Penalty Date Days Prior Amount						
					5th CXL Penalty Date Days Prior Amount						
					Air Ticketing Date Days Prior						
					Tour Cut Off Date Days Prior						

Two types of booking deadlines are established here; those related to payments due — on the left side — and those related to cancellation penalties, over on the right.

If your payment and cancellation deadlines and amounts tend to be the same for each tour, it is possible to set “Business Rules” which will populate the various deadline fields by clicking the **Manage Defaults** button.

If deadlines are outside the norm, they can be set manually by simply inputting dates and amounts in the appropriate fields, or you can use the “date calculator.” For example, if your first cancellation date is 120 days prior to departure, type 120 in the **Enter # Days Prior** field at the bottom right. Then click on the “load button” that precedes **First CXL Penalty Date** at top right. Doing so will load the actual date, the number of days until that date will roll around, and will reconfirm 120 as the “formula” that was applied to establish the date.

There are two ways to establish your initial deposit date and amount. If you take reservations over the phone and allow a “grace period,” during which the deposit can follow, then click the button labeled “1st Deposit Relative to Booking Date,” enter the number of days of grace in the **1st Deposit Date Factor** field, and do not make an entry in the **1st Deposit Date** field. If you require a deposit at the time of booking, you can enter “today’s date” (the date you create the Tour record) in that field or, better yet, click the “1st Deposit Relative...” button and set the number of days to zero.

Payment and cancellation amounts can be reflected in dollars or in percentages. For percentages, use .25 to represent 25%, by example; 100% will be input as 1.

All of the payment fields are referenced in the Bookings database. Whenever a payment is not received on time, the delinquent traveler will appear on a “Late Payment List.”

The same is true for cancellation penalties. When a cancellation is processed in Bookings, TourTools™ will calculate the penalty due based on details stored in Tours (which amounts can be overridden for special circumstances). To be sure, the penalty amounts are not cumulative, in other words, the amount associated with the date is what will be charged.

The dates entered in the **Cancel Tour By**, **Air Ticketing** and **Tour Cut-Off** fields are reflected on reports that can be run from the Tours Reports menu.



Establishing deadlines here in Tours does not translate to To Do reminders. If you want to be reminded of an Air Ticketing deadline, for instance, you need to create a To Do reminder for same.

Cruises Tab

Main / Notes	Prices / Avail	Pay Deadlines	Cruises	Groups	Buses	Flights	Meals	TourTools Online	Email Log	Tasks / Docs	Reports
CRUISE INFORMATION											
<input type="text"/>			<input type="text"/>			<input type="text"/>			<input type="text"/>		
Ship Name			Cruise Line			Ship Registry			Ship Comp Policy		
<input type="text"/>						<input type="text"/>			<input type="text"/>		
Ship Web Site						Ins Grp #			Ins Plan #		
<input type="text"/>											
Invoice Note											

This tab allows you to track and reference important details for the Tour if it happens to be a cruise. This information is pulled into all bookings.

Groups Tab

Main / Notes

Prices / Avail

Pay Deadlines

Cruises

Groups

Buses

Flights

Meals

TourTools Online

Email Log

Tasks / Docs

Reports

GROUP ALLOCATIONS

Group

Leader

Estimated

Allocated

Booked

Available

Primary ownership of the Tour is set on the **Main / Notes tab**. But it is possible to associate more than one GL with a tour. This is done on the **Groups tab**. Any time you want to adjust the numbers or otherwise peek at the details of the re-seller's record, click on the button labeled "Detail". Should any one of the GL's drop out of the tour promotion, you can disassociate them from the tour by opening their record and using the "Delete" button you'll see at the top of the layout. **Note: It is important to realize that this process does not protect seats for any of your promoters, it is simply a reference as to "promises made". If you want to actually take seats out of inventory, you will want to set up a GL Booking record (covered in Chapter 7).**

To begin, click the button labeled "Add Group". This will walk you through the process of finding and selecting the Group Leader's Client record, after which you'll be presented with a layout like below.

Close/Exit

Group Details

FullName

Tour Name

Lynne Stolk

Tour Begins

Tour Ends

Number of Seats (load Driver and Staff fields to set)

	Passengers	Driver(s)	Staff Sgls	Staff Dbls	Total	
Blocked	52				52	WL PAX
Utilize					0	

Total For Tour - Allocations subtracted from Total Blocked yields

Update

Estimates	Allocations	Available		
		52		
Estimate	Allocation	Booked	Available	Date of Update
				10/31/2022

Group Name

Lynne's Happy Campers

Party Name

Group Web

Packages Associated with

Package	Begin Date	End Date	Published?

The top part of the screen will reflect details about the tour name, date, and seat totals; and at the bottom, in the fields highlighted in red, you will enter the number of seats estimated to be used by the group. The field highlighted in yellow will eventually reflect how many bookings attributable to the group leader have actually been made, and in the field highlighted in blue you will see an indication of how many of those seats are still available. Clicking on the button labeled “Update” will load today’s date in the “Date of Update” field.

GROUP

Est

Alloc

Bkd

Avail

Note that it is possible to associate more than one GL with a tour. As you do so, they will list on the “Groups” tab (and the very first one you tag will be visible on the front page of the Tour record, as seen here). Any time you want to adjust the numbers or otherwise peek at the details of the re-seller’s record, click on the button labeled “Detail”. Should any one of the GL’s drop out of the tour promotion, you can disassociate them from the tour by opening their record and using the “Delete” button you’ll see at the top of the layout.

Back on the Groups tab of Tours, you are able to reference the number of GL’s associated with the trip, and the *total* of seats have been estimated and allocated.

✿ It is important to realize that this process does not protect seats for any of your promoters, it is simply a reference as to “promises made”. If you want to actually take seats out of inventory, you will want to set up a GL Booking record (covered in Chapter 7).

Buses Tab

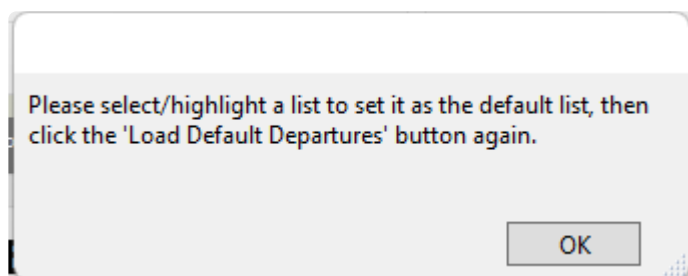
Main / Notes Prices / Avail Pay Deadlines Cruises Groups **Buses** Flights Meals TourTools Online Email Log Tasks / Docs Reports

BUS DEPARTURE/RETURN DETAILS

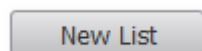
Departures This Tour	Preset Departure Lists			
Departure Point	Date Out/Ret	Time Out/Ret	Schedule	Count
<div style="display: flex; align-items: center;"> <div style="margin-right: 10px;">↶</div> <input style="width: 100%;" type="text" value="Departure Point"/> </div>	<input style="width: 100%;" type="text" value="Date Outbound"/> <input style="width: 20px;" type="button" value="📅"/> <input style="width: 100%;" type="text" value="Date Return"/> <input style="width: 20px;" type="button" value="📅"/>	<input style="width: 100%;" type="text" value="Time Outbound"/> <input style="width: 100%;" type="text" value="Time Return"/>	<input style="width: 100%;" type="text" value="Bus Code"/>	<input style="width: 50px;" type="text" value="# PAX"/> <input style="width: 20px;" type="button" value="🗑"/>

On this tab, details of the motorcoach pick-up and drop-off points and times are maintained. These choices are available to pick from in Bookings and are the basis for the Departure and Return Bus Manifests.

On the right-hand side of the Bus tab, click the button button labeled “Default Departures.”

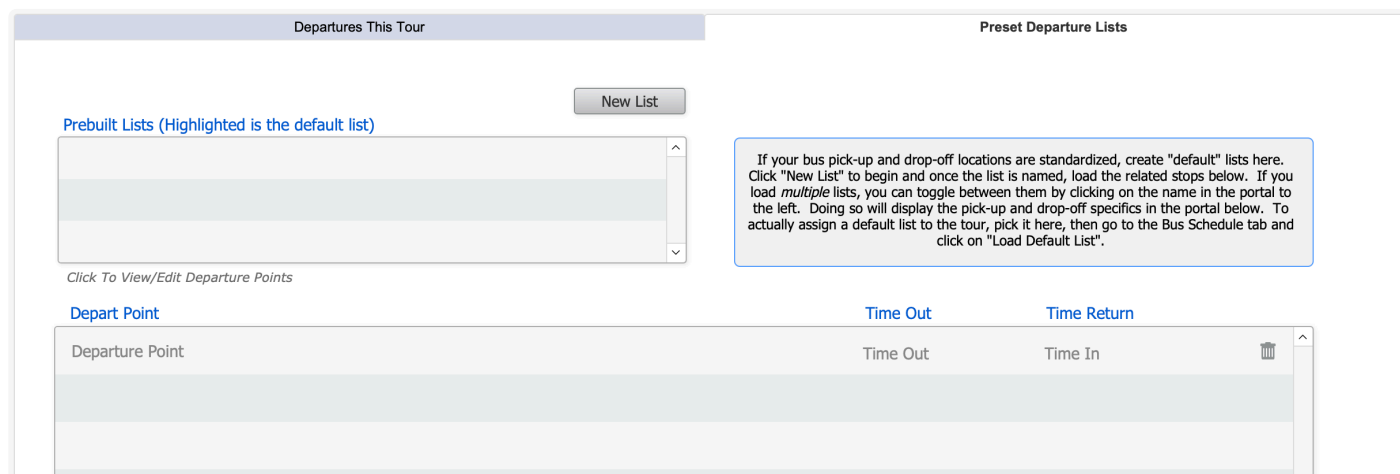


A dialogue box will appear explaining the next steps, click the “OK” button.



To create your first list, click on the “New List” button in the middle of the new screen, which will invite input of a name or label for the list. Once you have provided same (in our example, “Default Departure Points”), enter your first, second, etc., pick up points in the area just below. If you have regular, established runs, it may be appropriate to already enter times in the “Time Out” and “Time Return” fields. If those change from trip to trip, leave those fields blank until details are finalized.

As fits the need, you are able to create numerous lists, any and all of which are going to be visible to you from *any* Tour record in the system; in other words, the lists created and maintained *on this tab* are not unique to one particular tour...not at this juncture anyway. As the lists begin to stack up, open up any one to view details by simply clicking on its name. If edits are in order, simply add stops as appropriate or use the small trash can icon to delete a stop that is no longer needed. Clicking on the “Clear Display” button will temporarily clear the bottom portal.



To actually attach one of these default lists to the tour in question, click on the list name to identify the desired list from this screen, then return to the Bus Schedule tab and click on the button labeled “Load Default List”. It is here that you will eventually assign pick up and drop off times that relate *specifically* to this tour; probably shortly before you produce final trip documents. As needed, colors can be assigned to the schedules, “Green Bus”, “Red Bus”, by example; which values are maintained in the Tour Bus Codes list, accessible via the File Maker menu choice File > Manage > Value Lists (available only to specific password holders). As mentioned earlier, you will be able to assign passengers to these schedules in Bookings.

Click on the button that looks like a small pencil to the right of each segment to log additional information related to the pick-up/drop-off location. For example, you may choose to enter the address and possibly a telephone number at the location, or directional details for the driver. If for some reason any one of the values from the list that has been associated with the tour is not appropriate this one time, it can be deleted by clicking on the trash can button (which change does not affect the default list itself).

If you are interested in customizing your system to include actual motorcoach seating charts that make it possible to assign seats to passengers on a given tour, please check with your Datavast support team. Once incorporated, separate instructions will be provided to explain the functionality.



<https://player.vimeo.com/video/805997926>

Flights Tab

Main / Notes	Prices / Avail	Pay Deadlines	Cruises	Groups	Buses	Flights	Meals	TourTools Online	Email Log	Tasks / Docs	Reports
--------------	----------------	---------------	---------	--------	-------	---------	-------	------------------	-----------	--------------	---------

FLIGHT INFORMATION

Tour Origin Air City, State

Tour End Air City, State

CREATE AND LOAD FLIGHT SEGMENTS

Date
Date Offset
Carrier Code
PNR #s

Fare
Flight Group

Itin Color ☐ Red ☐ Green ☐ Blue ☐ Land ☐ Gold ☐ Special
Dep Time
Dep Airport Code

Arr Time
Arr Airport Code

Date	Date Offset	Seg Description	Carrier	FLT#	Carrier Name	Class	PNR Loc#	Itin Color	Type Booking
Oct 28, 2023		GRR-BWI DL # 1234	DL	1234	Delta Airlines	ECON	RED 1028	RED	<input type="button" value="Edit"/>
DEP 8:00 AM	GRR	Grand Rapids	ARR Oct 28, 2023	10:00 AM	BWI	Baltimore			
Nov 3, 2023		BWI-GRR DL # 5678	DL	5678	Delta Airlines	ECON	RED 1028	RED	<input type="button" value="Edit"/>
DEP 7:00 PM	BWI	Baltimore	ARR Nov 3, 2023	9:00 PM	GRR	Grand Rapids			

If the tour includes flight arrangements common to every passenger or specific to individuals, it is suggested you load the itinerary here in Tours. Be aware that it's also possible to create common, as well as individualized, itineraries in Bookings.

Here's the process in Tours:

Begin by clicking the "Clear" button if there is extraneous data in any of the fields, then click on the "Depart" button to load the departure date of the tour. Add information in the fields as shown below (the "Date Offset" is for a 1 or a -1 if the flight crosses an international dateline). The codes needed for the airports and the airlines need to be pre-loaded in the Support File named Airport Codes, found on the Home page.

To load the return schedule, repeat the process; this time using the "Return" button to begin, and again assigning the color and PNR as loaded in the outbound segments.

As you finish with each segment entry, click on "Load" and the schedule will move to the portal below.

All segments that are part of a multi-leg itinerary should be tagged with the same color and PNR. Doing so will make it possible to confirm the entire flight schedule in Bookings by simply choosing the itinerary color.

If you wish, input the fare in the field so named in one of the related records. **Note that if you do, the amount will be added to the balance due in any Booking records to which the flight is linked, thus impacting revenue, but it is not accounted for on the payables side! In order for that to happen, in lieu of adding a cost here, you should create a Contracted Services record (which likely will be "Inventory On", back in Vendor), which will be linked to a Package which can also be sold to the group members. In that case, there will be an Ops record for the airfare and thus the payable will be accounted for.**

Should there be a change to the itinerary after it's been loaded here in Tours, click on the "Edit" button to

make changes which, as you'll be warned, will impact the itineraries previously linked to Bookings.

Note that the Edit Flight Segment includes a button labeled "Duplicate". Use that to create a record, by example, for an individual flying the same itinerary as created for the group but on a different date. In such a case, the process would be to dupe the record, change the date(s), assign a new color and a new PNR and "Save".

Meals Tab

The screenshot shows the 'MEAL DETAILS' form. At the top is a navigation bar with tabs: Main / Notes, Prices / Avail, Pay Deadlines, Cruises, Groups, Buses, Flights, Meals, TourTools Online, Email Log, Tasks / Docs, and Reports. The 'Meals' tab is active. Below the navigation bar, the form has three columns: Date, Description, and Choices - separated by a return. The first row contains 'Sun, Oct 29, 2023', 'Clyde's of Georgetown', and 'Burger Platter', 'Fish and Chips', 'Salad Bowl'. There are trash icons to the right of each row. A second empty row is visible below the first.

This is where you can record details of scheduled restaurant meals for which you want to solicit menu choices from your individual travelers. Load the date of the meal, some description of the occasion and/or the restaurant name, and the meal choices as indicated. Later, from within the "Pax" record of a Booking related to the trip, you will be able to make menu selections for each traveler. Once that's been done, there is a report that can be run that reflects everyone's choices. Note that the portals in Tours and in Pax allow for a maximum of five choices. If you need more, check with TourTools support.

TourTools Online Tab

The screenshot shows the 'TourTools Online' form. At the top is the same navigation bar as the previous screenshot. The 'TourTools Online' tab is active. Below the navigation bar, the form has a sub-header 'TourTools Online' and a series of tabs: Tour Information, Docs for Download, Instructions & Confirmation Text, Groups, Publishing, and Options & Settings. The 'Tour Information' tab is active. The form is divided into two main sections. The left section is for 'Tour Image' and includes a large image placeholder, 'Tour Image Requirements' (Max width: 768px, Width/height ratio: 3:4), and a note about optimal format. The right section is for 'Tour Name' and 'Tour Description'. The 'Tour Name' field contains 'DC Performance Tour'. Below it is a large text area for 'Tour Description'. At the bottom right is a 'Features List' section with a note 'List of "features" for this tour (one per line)' and a text area.

Use this tab to enter data and images related to the Tour that will be appear on your website (if TourTools

Online has been enabled for your system). For details on this section, see [TourTools Online](#) from Chapter 10.

Email Log Tab

Main / Notes	Prices / Avail	Pay Deadlines	Cruises	Groups	Buses	Flights	Meals	TourTools Online	Email Log	Tasks / Docs	Reports
EMAIL LOG											
Subject	Sent To	Body Preview <small>(hover to view full preview content)</small>	Time	Has Att							

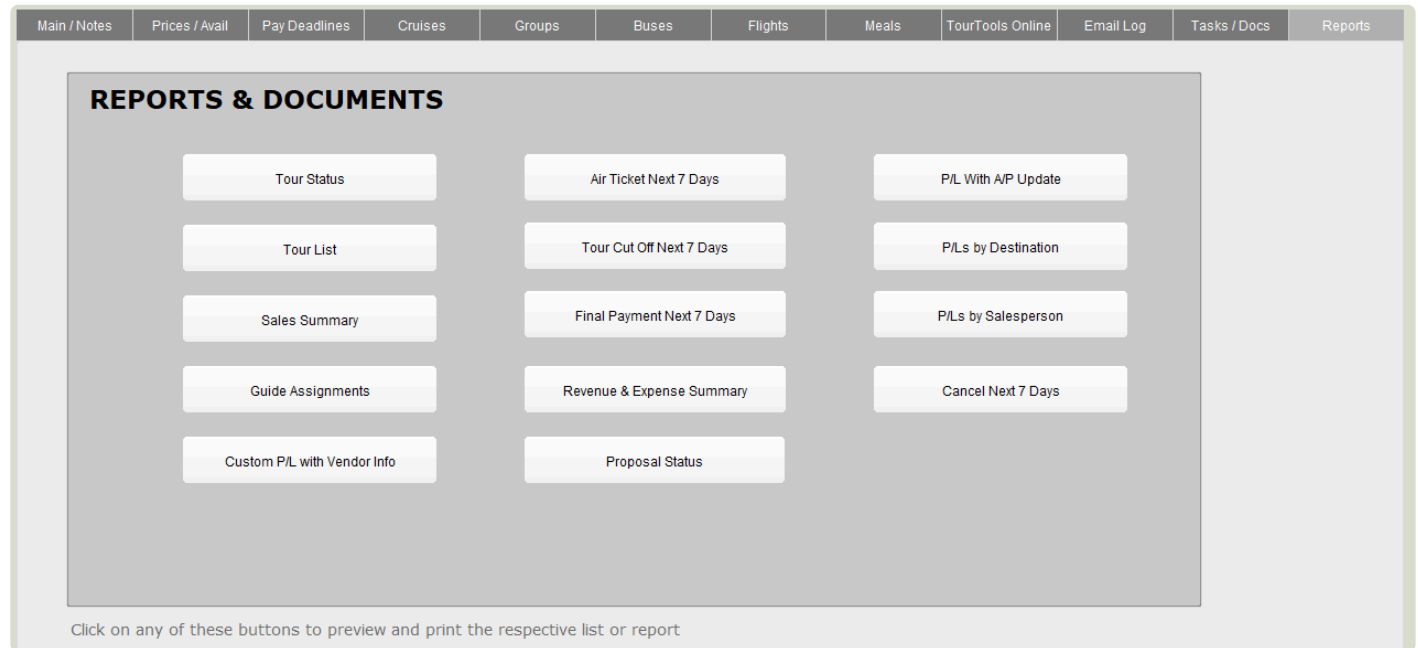
This tab contains a log of emails sent to Tour Passengers and/or Vendors out of TourTools. Hover over the various sections to see additional details. If an attachment was included (and if it was selected to be saved to the Tour record at the time it was sent) you will find that attachment in the Document Library on the **Tasks / Docs** tab.

Tasks/Docs Tab

Main / Notes	Prices / Avail	Pay Deadlines	Cruises	Groups	Buses	Flights	Meals	TourTools Online	Email Log	Tasks / Docs	Reports
TASKS / DOCUMENTS											
Tasks						Documents					
<div>+ Task</div>						<div> <div>PAST DUE</div> <div>DUE TODAY</div> <div>DUE WITHIN 7 DAYS</div> <div>Open Task List</div> </div>					
Action Date	Action	Related Details	Assigned To	Entered By	Complete						
11/22/22	Send first payment reminder notice	DCPERF10282023	Arin Preston	Arin Preston	<input type="checkbox"/>						

On either tab, click on the “+” button to create a new task or add a new document to the library. As in all modules, the tasks will come find you on your dashboard when the due date approaches.

Reports Tab



Here you can find all of your reports for the Tour module. Click this link to jump to the section at the end of this chapter related to [Tour Reports & Docs](#).

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Adding a New Tour



To create a Tour record, click on the “+ Tour” button. The first field of entry is the tour code which, looking ahead, is what you will initially select when making a booking. Since the codes will display in alpha or numeric order, consider your protocols for coding Tour records carefully. In our example, we have gone with a code representative of the year, the date and the destination.



Codes must be unique and should not be embedded in another. For example, do not use CRUISE as a code and subsequently create another code of CRUISE2. Doing so will cause problems with linked Booking or Operations records getting co-mingled when you do a “find” on one code or the other. **It is suggested that codes be no longer than 12 characters or digits combined** since anything longer starts to wrap in many of the fields where the tour code displays. Finally, avoid using punctuation in the codes. **It's important to note that the code will “lock down”, in other words become un-modifiable as soon as you leave the record, so be sure you like it before you leave it.**

Tour Code ST-PA092022-1	Name Best and Brightest Historical Tour	Start Date 08/31/22	Days 3	End Date 09/02/22	Nights 2	Tour Status Proposal	Res Status Avail
Tour Type ▼	Destination ▼	Closed ▼	Guaranteed <input type="radio"/> Yes <input type="radio"/> No	Load Factor 0.0%	Trip Type MultiDay	Default Bus Size 50	

Main / Notes	Prices / Avail	Pmt Deadlines	Cruises	Groups	Buses	Flights	Meals	Web Publishing	Email Log	Tasks / Docs	Reports
--------------	----------------	---------------	---------	--------	-------	---------	-------	----------------	-----------	--------------	---------

NUMBER OF SEATS

(numbers loaded in DRIVER, STAFF, and GL fields carry over to the package)

Passengers	Driver(s)	Staff Sgl	GL Dbl	Total	WL PAX
Blocked 50				50	
Booked				0	

GROUP

Group Name:

Full Name:

Estimated Allocated Booked Available

**Does not include Escort or Driver*

DIVISIONS

Assign Divisions

Currently Assigned

NUMBER OF ROOMS

Single	Double	Triple	Quad	Total	TM to Control Inventory?
Blocked 5	20			25	<input type="radio"/> No <input type="radio"/> Yes
Utilized					

FACTORS / #PAX

Cost Factor 30	Quote Factor 30	Account Manager	Travel Counselor
		▼	Legacy ▼
		Program Designer	Operations Officer
		Legacy ▼	▼

AUTOMATED EMAIL BLOCKING

BLOCKING OPTIONS [all bookings on tour]

blocking at the TM level prevents manual control at Booking level

Block Auto Emails?

Payment Reminder ☐ Yes ☐ No

Late Payment Notice ☐ Yes ☐ No

Medical Form Reminder ☐ Yes ☐ No

INSURANCE SELECT

[REMOVE INSURANCE](#)

None

Prices

TOUR NOTES

Tour Notes *(Internal Use Only)*

Enter note here & click the pencil button to the right to save

CONFIRMED GUIDES

Guide Name	Type	Phone Number	Email Address
▼			
Add tour notes here			

Enter the **Name** of the tour. This name will print on invoices and receipts sent to clients.

Enter the **Start** date, the date the tour begins. Even if you have pre-trip options, you will probably want this to reflect the start date of the “core” package.

Enter the number of **Days** for the (core) tour. The number of **Nights** will set based on your input, and the **End** date will drop in automatically.

Pick a **Tour Type** and a **Destination** from the value lists that presents. The values that you see here are maintained in Settings > Business Settings > System Modules > Value Lists. See the [Business Settings](#) section in Chapter 1 for more details.

Guaranteed is a “yes/no” indicator of whether the tour will operate regardless of booking activity or any other factor.

As there is booking activity on the tour, a percentage representing the number of active bookings as compared to the anticipated Number of Seats will appear as a percentage in the field labeled **Load Factor**.

Trip Type is a value list used to indicate if the trip is single or multi day.

Closed is another “yes/no” indicator of whether the trip is open to the general public or is restricted to a closed group.

If your company has multiple divisions or brands, it is possible to have the name, address, contact information—even logo, as needed—for each one loaded in TourTools™. In the **Division** field, pick from the values that present to identify the “banner” under which the tour will operate.



Any document that includes a logo, address, and contact information—invoices, receipts, statements, etc.—will reflect details representative of the division selected.

The field labeled “Tour Status” will automatically be set to **Active** when a Tour record is created. Use the “Hold” value to temporarily stop-sell a tour; “Non-Op” will be auto-loaded at the point you cancel a tour; “Lost” will be indicative of a lost sale; “Proposal” is the designation for Tour records that have been created for purposes of making a Proposal; and “Template” is the value to set when you want to duplicate the Tour record.



As mentioned earlier, the tour code is what you pick initially when making a Booking, and the only ones that will present are those for tours marked “Active” that are still to travel, i.e. departing later than “today”.

Invoice Type is simply an indication of whether invoicing for the tour will be direct to the passengers (Pax) or go via their Group Leader (GL).

Res Status displays “Avail” until less than 10 days prior to departure, at which point it will revert to “Call”.



<https://player.vimeo.com/video/837452566>

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: June 19, 2023

Duplicating a Tour

Clicking on the “Duplicate” button calls the most powerful script in TourTools™, that being the one that allows you to duplicate *all of the Packages* associated with a particular tour, and—as necessary— *all the Product Date and Contracted Services Records* associated with *them*.

For the process to work, the tour you are copying and the new tour must be the same number of days and nights duration, and must share a common “Destination.”

By example, you have a three day “Discover Grand Rapids” tour that begins on June 25, 2018; and you plan to operate an identical tour departing October 28. The June trip includes two nights of accommodations at the JW Marriott hotel, one dinner at the Six.One.Six Restaurant on day two, and admission to the Gerald R. Ford Presidential Museum on day three. All of these services are represented in Vendor as very specifically dated and inventoried services for June 25-27, June 27, and June 28, respectively; all of which have been linked to the Package that is linked to Tours.

To set the duplication process in motion, first temporarily change the status of your June 25 departure from “Active” to “Template.”

Then, create a Tour record for the new departure and click on the “Duplicate Tour” button. Any Tour records for tours identified as “Template,” with the same number of days and nights and the same Destination as the new record you just created, will appear in a list for you to pick from. Click on the “Select” button to make your choice and the script will go to work, checking whether—back in Vendor—Product Date Records and Contracted Services records for the hotel, restaurant and museum visit already exist. If they do, they will be linked to the new Package being constructed. If they don’t, the script will create and link new ones.

So, using our example, if, back in the JW Marriott Vendor record, a Contracted Services record does not yet exist for October 28/2 nights, the system will create one in order to replicate the itinerary for the new trip. Depending on the complexity of the Package(s) being copied, the script may take a few minutes to run. Once it finishes, you will want to double check that prices and possibly inventory associated with the newly created Contracted Services records are accurate or whether updates are in order. You will also want to check whether the itinerary in the duped Package(s) needs any tweaking, and more importantly— you will want to double check the pricing! In particular, make sure that the number of passengers over which any fixed costs are to be factored is accurate, and perhaps double check the number of comps that need to be provided.

Once everything is to your liking and, as necessary, the new Packages have been re-priced, go ahead and publish them and create Ops records. Be sure to also go back to the Tour record that you copied and change its status from “Template” back to “Active.”

As mentioned briefly in Chapter 3, the Category assigned to the Product Date Record in Vendor is critical to this script functioning correctly. To explain, imagine that the Vendor record for the JW Marriott has two Product Date Records, one dated January 1, 2018 through January 1 of the following year; and another for June 1, 2018 through December 31, 2018; both of which were assigned Category “Rooms”. Let’s say the contract for the June 25/2 nights stay was loaded in the first PDR.

When the duplication begins, the script is looking for some very specific direction as to which Vendor, which Product Date Record and which Contracted Services record it can use or needs to copy; and it very much depends on the Category to point the way. In our example, given the June 25/27 overnight could conceivably reside in “Product Date Record #1” or “Product Date Record #2”, unless each has a different Category, the script has to guess where it should look and what it might copy. It has a 50% chance of making the correct choice, but if it makes the wrong one, your records will be, in a word, a mess. The takeaway here is... very close attention needs to be paid to the Category assigned to overlapping Product Date Records. If they overlap if only by a single day, the Category needs to be distinctly different.

For rather obvious reasons, not all data will be copied from one Tour to another. Specifically, flight itineraries, bus schedules, meal choices, group allocations, etc.; details that are specific to one tour and not necessarily to another. Those are not assumed to be the same for both trips and will have to be entered manually.

DEMO: How to Duplicate a Tour in Minutes

We will be updating this video to demo the process in v5 instead of v4 – but the process is very similar!

<https://player.vimeo.com/video/660230969>

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Moving a Tour to New Dates

New Feature: Tour Date Changes

In previous versions of TourTools, it was not possible to change Tour dates once Packages had been attached. In TourTools v5 we've added the ability to move a Tour to new dates *as long as* the number of days/nights is the same.

More details will be added soon. Thanks for your patience.

Last modified: December 28, 2022

Cancelling a Tour & Closing Out Bookings/Operations Records

When you need to cancel a departure and the possibility does not really exist to offer your passengers an alternative, click the “Cancel Tour” button. Doing so will call a script which allows you to cancel all bookings, send cancellation letters, and change the trip to a “Non Op” status.

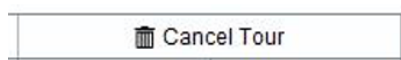
If, however, the possibility does exist to offer an alternative trip, then you will want to send everyone an email or letter advising their trip will not be operating and inviting them to cancel and receive a refund, or transfer to ABC or XYZ tour. As you hear back from each participant, you will be able to individually cancel or rebook them. Once every Booking has either been canceled or transferred, manually mark the Tour record as “NonOp.”

(Closing out Booking and Ops Records)

In the event it becomes obvious that a tour is not viable and needs to be cancelled, there are two ways to go. One involves offering an alternative tour and hopefully transferring your booked passengers; or cancelling and refunding them.

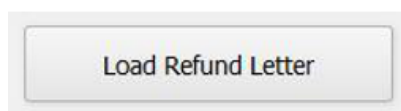
If there is a possibility that a cancellation penalty will be assessed, the first thing you want to do is make sure the penalty date(s) and amount(s) are correct on the Deadlines tab in Tours.

Cancelling the Bookings without Offering an Alternative



With the Tour record open, click the navigational button labeled “Cancel Tour”. You will be double checked on your decision to proceed, and will then be asked if you want to cancel the Bookings for all related travelers; respond “Yes”.

Navigate to the Booking records from there and, on the “Refunds” tab, double check that an appropriate penalty has been calculated. If the figures look correct, proceed to the Refunds tab and enter the details of the check that has been issued; or, in the event the refund is being done via credit card, go to the Payments tab to action that.



Once the refund is processed, go to the **Booking Reports tab** and select “Load Refund Letter”.

Cancelling the Bookings/Offering an Alternative Tour

If you are going to offer the option of a transfer, then decline this invitation to cancel all related Bookings and simply cancel the tour.

Next, move through the Bookings and cancel them one by one. Follow the process to for [Canceling a Booking](#) or individual traveler. Your response to the prompt will be that you want to “Rebook”.

Regardless of how you decide to deal with the Booking records, once the script to cancel the Tour is invoked, the status of the Tour record will go to “Non-Op”, the numbers that previously showed in the “Seats” and “Rooms” fields will be wiped clean, and the Tour Notes field will reflect “THIS DEPARTURE HAS BEEN CANCELLED”.

Closing out the Ops Records



In Ops, there is also a “Cancel” button which, when clicked, will ask a similar question as what is prompted in Tours, i.e. do you want to cancel just the record you have open or all records related to the same tour. Regardless of your choice, when you “Cancel” an Ops record, all of the passenger numbers are stripped out so that nothing is impacting the costs and the Balance Due thus shows as zero. The only way you can reflect that you owe that vendor something—if you are being charged a penalty, for example—is by entering the amount in the misc field.

Example

Say you have a Vendor that you owed and paid \$1,000 and they are not giving you any refund. On the A/P tab, in the Misc Cost field enter \$1,000 and in the adjacent Description field enter “CXL Penalty” (or similar).

For a Vendor that you owed/paid \$1,000 that is refunding you \$500, do the same thing as far as posting a Misc Cost of \$500 and “CXL Penalty” as the description. When the refund check is received, post it as follows: In the Transaction Description field, chose “Refund Rcvd”. The amount goes in as (positive) \$500 and the Label should be “CR”. Click on “Post” as always and enter the number of the check you’ve received.

One final adjustment may be to remove any numbers that remain in the “Manual Adj” fields that appear on the Inventory and Account Payable tabs.

After accounting for penalties and posting refunds that you may have received from the Vendor, the record should reflect a zero payable.

In the end, your Ops cost should basically reflect the total of what you paid and didn’t get back, and on the Res side you’ll see what you didn’t refund the group.

When you run the P/L report, the Res Paid field will reflect all payments received.

The Res Due should be empty.

The Rev Adj Est will reflect the amount of your refund to the booking record.

The Tour Gross field should reflect the amount you penalized your client.

The Ops Cost field will reflect the total of all your Vendor penalties.

The Ops Paid field should match the Ops Cost amount.

The Ops Payable field will be empty.

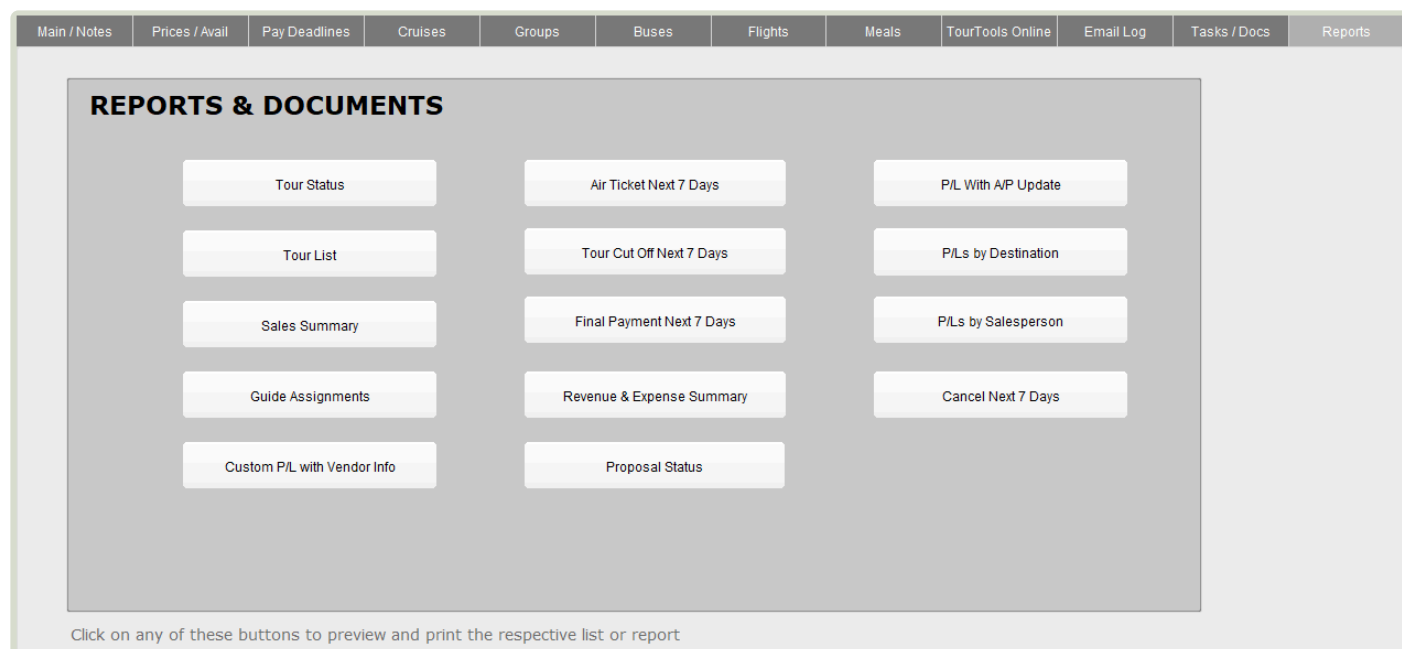
The Est Profit will be the difference between what you kept (the penalty amount) versus what you paid/lost to your Vendors.

The % will, as always, be a reflection of the difference (positive or negative) between your receivables and payables

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Tour Reports & Docs



Reports generated from this module are generally related to sales, revenue and deadlines; and are compiled in much the same way. Scripts attached to many of the icons will initially ask if you want the report to include all of the tours for the year, make a specific selection, or report on only the tour, the record of which you are in.

Tour Status and Tour List:

Tour Status

Compiles a report of all tours that are currently set to active.

Filters can be changed on the dialogue box that appears after clicking this button. You may also note the various delivery options such as printing and emailing.

Tour List

Generates a report of ALL tours, similar to the Tour List view.

This report lists the locations of each tour, their tour code, group leader, the number of packages within the tour, departure & cancel by dates, how many seats are available, and how many seats are sold.

Sales Summary: Similar to the Tour Status and Tour List but including some financial information.

Sales Summary

A report for all sales metrics, including the tour name, tour code, how many spots are available, how many have been sold, payments and what is still due, the tour gross amount, and the status of each tour.

Guide Assignments: A summary of guides and their assigned tours, destinations, etc.

Guide Assignments

This report will show you all of the group leaders in a specific tour and the members of each group. This report will also include the tour name and group name for clarity.

“Next 7 Days” Reports: These reports compile considering “today’s date” relative to the dates entered on the Deadlines Screen.

Air Ticket Next 7 Days

Tour Cut Off Next 7 Days

Final Payment Next 7 Days

Cancel Next 7 Days

Profit/Loss with A/P Update; Profit/Loss by Destination and Profit/Loss by Salesperson: These reports are all essentially the same but are sorted or grouped in different ways. The first is best used to get a “big picture” look at all tours during the first quarter, by example. The second will group and present totals based on the Destination. The last will group by salesperson (and is dependent on the Client record associated with the Tour record having a Salesperson assigned to it).

P/Ls by Destination

A profit and loss summary, categorized by travel destination.

P/Ls by Salesperson

A profit and loss summary, categorized by salesperson.

Custom P/L with Vendor Info: A customized report of profit and loss with information classified by vendor.

Details on other reports to be added soon.

Custom P/L with Vendor Info

Revenue & Expense Summary

Proposal Status

P/L With A/P Update

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Chapter 5: Packages

The Packages Module – Unlimited Options & Flexibility

All of the Contracted Services records from Vendor that represent services included in a Tour come together in Package.

As explained in Chapter 4, every Tour will have at least one, and more likely several, Packages linked to it.



The relationship between Tours and Packages is demonstrated using a cruise as an example, given you need a means to offer different cabins at different prices.

Similarly, a student tour operator might create one Package for the kids, and a slightly different Package for the chaperones; *both* of which might include some common elements and *each* of which will feature services specific to adults or students.

Separate Packages not only allow for the possibility of different price points, it also gives you the ability to very specifically account for numbers and charges on the Vendor side for one type of service or another.

Last modified: March 27, 2023

Packages Module – List View

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

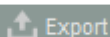
All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

Package List														
QUICKFIND														
Package Name	Date Begin	Date End	#Days	Tour #	Published?	PAX	Single	Double	Triple	Quadruple	Prop Inc	Web	Select?	
Core Package Package #: 15926 Tour Name: Explore Grand Rapids	06/25/23	06/30/23	6	18575	08/11/22	4	0	2	0	0	x			
Mike Alexander 10-Day Holy Land Tour 5-1 Package #: 15927 Tour Name: Mike Alexander 10-Day Holy Land Tour	10/12/23	10/21/23	10	18577	08/11/22	2	1	.5	0	0	x	x		
Tour Manager Package Package #: 15928 Tour Name: Explore Grand Rapids	06/25/23	06/30/23	6	18575	09/01/22									
Inside Cabin Package #: 15930 Tour Name: Bahamas Cruise	08/28/23	09/01/23	5	18578	08/21/22	3	1	1	0	0				

Feature Buttons

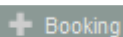
In the thin green/gray button bar we call the Feature Bar (just below the Module Navigation bar) at the top of this screen, you will find access to various scripted functionality related to the list.

Export



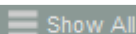
Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

+ Booking



This button is helpful to operators that offer trips to the general public. The scenario is this: a res agent starts in Client when a call comes in, choses to **Check Availability**, and then moves to Tour and, ultimately, Package where the **+Booking** button could be clicked to launch the booking process directly out of Package for the selected Client.

Show All

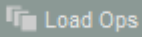


Eliminates any filters you have on your list and shows all Packages. This button only shows when you are in a found set and NOT viewing all records.

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Type in your criteria and click SUBMIT. Click STOP to cancel the find process.

Load Ops



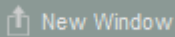
Click this button to create Operations records for the Packages in the current found set.

Reports



Clicking this button will bring you to the Packages Reports tab.

New Window



Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Packages Module – Detail View

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Package.

The screenshot shows the 'Package Details' view for 'Core Package'. The top navigation bar includes buttons for List View, Publish All, Booking, Tours, Vendors, Clients, Ops, Find, and New Window. The main header shows 'Record 1 of 16' and 'Record ID: 15926'. The left sidebar lists various packages, with 'Core Package - EXPGR06252023 PUBLISHED REPRICE' selected. The main content area displays package information, including Package/Option Name, Pkg Type, Primary?, Commission Level, Priced?, Published?, Booked?, and Published to Web?. Below this, there's a section for 'Explore Grand Rapids' with fields for Tour Name, Tour #, Tour Code, Package/Option Description, Start, Days, End, Nights, and Division. The bottom section, 'REVIEW/MANAGE ITINERARY', includes a 'Duplicate' button, 'Package Bookings' table, and a 'PACKAGE ELEMENTS' table with columns for Vendor, Description, Date Begin, Date End, Prop Order, Prop Only, Prop Omit, Contract Rec'd, and actions like Replace, Delete, and Email.

Feature Buttons



List View

Use this button to return to the Packages List View.

Publish All

Click this button to quickly publish all Packages related to the current Tour.

+ Booking

This button is helpful to operators that offer trips to the general public. The scenario is this: a res agent starts in Client when a call comes in, chooses to **Check Availability**, and then moves to Tour and, ultimately, Package where the **+Booking** button could be clicked to launch the booking process directly out of Package for the selected Client.



< Tours

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Tour related to this Package.

< Vendors

Use this button to jump to the Vendor records related to this Package.

< Clients

Use this button to jump to the Client record related to this Package.



< Ops

Use this button to jump to the Operations records related to this Package.

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Type in your criteria and click SUBMIT. Click STOP to cancel the find process.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Package Details Layout

To keep things simple, we’re going to address first of all the information seen on the top half of the Package record. After that, we’ll go tab by tab through the bottom section.

Package/Option Name	Pkg Type	Primary?	Commission Level	Priced?	Published?	Booked?	Published to Web?
Core Package	PKG	Primary	None	Status: Reprice	Published	PAX	No
Tour Name	Tour #	Tour Code	Package/Option Description				
Explore Grand Rapids	18575	EXPGR06252023					
Start	Days	End	Nights	Division			
Sun, Jun 25, 2023	6	Fri, Jun 30, 2023	5				

Your Package will initially be “typed” as a PKG but there are alternatives. To explain each type:

AIR: If you want to separately show and bill for the cost of air transportation, create an AIR Package.

BUS: A Package containing just the motor coach component would be classed this way.

DRVR: This identifies the Package containing services that will be used by the driver.

INS: There are several ways that insurance can be sold in TourTools™. If the cost of coverage is what might be described as a “flat fee”, in other words not dependent on the cost of arrangements purchased by the traveler, their age, or other factors; then creating one or perhaps several Packages will work for you.

LAND ONLY: This would be the counterpart to your Air Package; i.e. a bundling of the rest of the tour services in a Package classed LAND ONLY.

OPT: Options which will be available in addition to the basic Package, pre- or post-tour extensions, by example, would be categorized as OPT.

PKG: A standard Package usually containing all components of what might be considered the “core” tour. This may or may not contain air segments.

STF_DBL/STF_SGL: These identify Packages that will be used by your tour manager or other staff traveling with the group.

✿ When you price a Package typed DRVR or STF SNG/DBL the Selling Price will display as zero, the logic being the driver is rarely and the staff (tour manager) never billed for their travel. In the event they are to be charged, then create Packages classed as PKG for them. To be sure, the Ops records related to these personnel Packages will reflect a cost and therefore the expense is considered as part of your P/L report. What you will not have is a receivable in Bookings.

By default, your Package will also be set as **Primary** in the field so labeled. The alternative is to class the Package as “Other.” To explain the difference, an “Other” can’t be purchased without first confirming a “Primary;” the best example being a shore excursion on a cruise or a pre-tour hotel night. An “Other” Package would never be purchased on its own.

In the field labeled **Commission Level**, pick from the list of values to indicate the level at which this Package is to be commissioned. What you enter here relates to levels that you have assigned in the Client record of or a Booking related to an agency or a group leader. When the Package is sold to a Client identified as a Master Record or to a Client linked to a Master Record, a commission will calculate in the Booking record.

In the field labeled **Division**, you will likely see your company name unless you have multiple divisions and sell under multiple brands. If you do, this field will offer a drop down selection for you to choose from. This field is auto-set to match the Tour it is related to by default. If the field is blank (it should always contain *some* value otherwise your documents will not have a log or company information), that indicates it may not have been properly set in the Tour record.

If the Package cost is finalized, the Status will show as “Priced”. The alternative is a “Re-Price” indicator, which is a tip-off that 1) the Package hasn’t been priced; 2) the itinerary has been altered—something has been added or removed; or 3) the cost of a Package Element has been changed. Publishing a Package basically makes it available to book; values of “Published” or “Not Published” will present here. Under “Booked”, values of “PAX” or “No PAX”, indicate whether there are Bookings. Finally, the status of “Published to the Web?” will reflect a **Yes** or **No** value, dependent on whether or not the Package in question is visible on your website.

Bahamas Cruise			
<u>Priced?</u>	<u>Published?</u>	<u>Booked?</u>	<u>Published to Web?</u>
Status: Price OK	Published	PAX	No

Also, post-pricing, you will see an indication that the Package is “Price OK”. The alternative is a “Re-Price” indicator, which is a tip-off that 1) the Package hasn’t been priced; 2) the itinerary has been altered—something has been added or removed; or 3) the cost of a Package Element has been changed.

Main / Itinerary Tab

Main / Itinerary

Add Products/Services

Pricing

Terms & Conditions

Notes

Web

Operations

Reports

REVIEW/MANAGE ITINERARY

Duplicate

PACKAGE ELEMENTS

Vendor	Description	Date Begin	Date End	Order	Prop Only	Prop Omit	Contract Rec'd
JW Marriott Hotel	Double-Double Rooms including Buffet Breakfast	Sun, Jun 25, 2023	Fri, Jun 30, 2023	3	<input type="checkbox"/>	<input type="checkbox"/>	Replace
Friends Tours, Inc	Tiberias 4 star hotel	Sun, Jun 25, 2023	Mon, Jun 26, 2023	9	<input type="checkbox"/>	<input type="checkbox"/>	Replace
Sundance Grill	Three Course Dinner including Gratuity	Tue, Jun 27, 2023	Tue, Jun 27, 2023	7	<input type="checkbox"/>	<input type="checkbox"/>	Replace

Package Bookings

# Trav	Adults	Kids	Single	Double	Triple	Quad
4	4	0	0	2	0	0

This is the tab that displays the current itinerary for your Package and provides tools for managing and adjusting it.

For more information on building and managing itineraries, jump to the upcoming section on [Itinerary Building](#).

Add Products / Services Tab

Main / Itinerary
Add Products / Services
Pricing
Terms & Conditions
Notes
Web
Operations
Reports

By Vendor
By Metro Area & Type

BUILD ITINERARY - BY VENDOR
Vendor:
Click on the down-arrow symbol, then type the first few letters...

ADJUSTMENTS / COMPS
Start Day No.: Load ▶ Start: End: Nights:
Quantity: # Fixed: # Rollaway: Driver(s): Staff Sng: Staff Dbl:
Set comp numbers here. Clear values if no comps to be calculated. Defaults are set in the Tour record.

CONTRACTED SERVICES ADDED - MOST RECENT

Adult Admission	06/26/23	Gerald Ford Presidential Museum	✉
Three Course Dinner including Gratuity	06/27/23	Sundance Grill	✉
Double-Double Rooms including Buffet Breakfast	06/25/23	JW Marriott Hotel	✉

CONTRACTED SERVICE SELECTION

Contracted Service Available	Date Begin	Date End	Inv	Avail	Dbl Rate	Adu Net	Fixed Rate
<input type="button" value="Add"/> Three Course Dinner including Gratuity	Sun 1 Jan 23	Sun 31 Dec 23	off	off		27	

This is the tab where you will build an itinerary by creating Package Elements from Contracted Services found in your Vendor product Library. For more details on this process, see the following section on [Itinerary Building](#) later in this chapter.

Pricing Tab

Main / Itinerary
Add Products/Services
Pricing
Terms & Conditions
Notes
Web
Operations
Reports

GROUP PACKAGE PRICE INFORMATION

Room Types Included:
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☐ Yes ☒ No
☐ Yes ☒ No

Sell Prices:

SINGLE	DOUBLE/OPT	TRIPLE	QUAD	CHILD	EXTRA BED/PER
\$750.00	\$625.00	\$583.33	\$562.50	\$0.00	\$0.00

This is the area where pricing and comps and margins will be established for the Package. It is also where you will tell the system that the Package should be published and made available for booking. For details on this process, please jump to the upcoming section on [Package Pricing and Publishing](#).

Terms & Conditions Tab

This is where you will load, enter, and edit text that will appear on the actual Proposal document.

Package/Option Name Inside Cabin	Pkg Type PKG	Primary? Primary	Commission Level None	Priced? Status: Price OK	Published? Published	Booked? PAX	Published to Web? No
Tour Name Bahamas Cruise	Tour # 18578	Tour Code CRU08282023	Package/Option Description				
Start Wed, Aug 30, 2023	Days 5	End Sun, Sep 3, 2023	Nights 4	Division			

Main / Itinerary	Add Products/Services	Pricing	Terms & Conditions	Notes	Web	Operations	Reports
------------------	-----------------------	---------	--------------------	-------	-----	------------	---------

TERMS & CONDITIONS FOR DOCUMENTS

Click the arrow buttons below to load the default text from Business Settings; appears on Proposals by default

► Inclusions (Itinerary Description)

Policy text

► Terms and Conditions

Conditions text

► Additional Features / Special Instructions / Options

Options text

Use the small “load arrows” to pull the text into the three fields here. As usual, any edits you might make here, specific to the Package and proposal you are about to generate, do not alter the text loaded back at the source.

At the highest/source level, the Terms & Conditions are managed in Settings > Business Settings > System Modules > Terms & Conditions (accessible only to Owner and Manager logins). It is here that it is suggested that you load verbiage to cover any and all eventualities. Verbiage that does not apply to a certain Package can be easily deleted here on this tab.

For more information, see the [Business Settings](#) section in Chapter 1.

Notes Tab

NOTES

Compose a new note here, then click the [+ Note] button.

+ Note

12/4/2022 6:22:41 PM Developer: Test

This tab contains an area where free-form notes and history can be maintained, similar to Client and Vendor. Type your note in the upper field, then click the **+ Note** button to add it below; it will automatically be stamped with your name and the date.

Web Tab

WEB - DAY BY DAY ITINERARY

Publish Package To Web? ☐

Day Entry

Image File Entry

Spell Add Day Clear

Summary Entry

Day Description Entry

Disable Price Option on Website

☐ SINGLE

☐ DOUBLE

☐ TRIPLE

☐ QUAD

Day	Summary	Image

If you have TourTools Online added to your Back Office system, this tab will provide tools for managing the itinerary as it should display online. It allows you to:

- setup a day-by-day itinerary that shows up formatted online; the itinerary has nothing to do with product or inventory, though – it's purely for display.
- publish or unpublish the package from the website, which you can also do from the Tours > TourTools Online tab
- hide or show individual price options (e.g. – you want to reserve singles for group leaders, and only make quads available online)

For more details, jump to Chapter 10 section about [Managing TourTools Online in FileMaker](#).

Operations Tab

Main / Itinerary

Add Products/Services

Pricing

Terms & Conditions

Notes

Web

Operations

Reports

PACKAGE / OPTION DESCRIPTION

Adult Sell Prices

Single

Double/Opt

Triple

Quad

Closed Out?

\$750.00

\$625.00

\$583.33

\$562.50

No

Package Bookings

#PAX

Single

Double

Triple

Quad

4

0

2

0

0

OPERATIONS RECORDS

Vendor

Description

Begin Date

End Date

AP Total

JW Marriott Hotel

Double-Double Rooms including Buffet Breakfast

Jun 25, 2023

Jun 30, 2023

\$766.00

Friends Tours, Inc

Tiberias 4 star hotel

Jun 25, 2023

Jun 26, 2023

\$0.00

Sundance Grill

Three Course Dinner including Gratuity

Jun 27, 2023

Jun 27, 2023

\$54.00

Upon publishing your Package, Ops records will be created. They can be referenced here and the up-arrow button functions as a “hot key” to jump to the related Ops record.

Reports Tab

Reports & Documents

Print Proposal

Package PAX List

Tour Element Inventory Report

Package Status

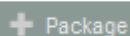
Click on any of these buttons to preview and print the respective list or report

This tab will show you all of the available Packages reports, including one of the most important documents in TourTools – the proposal. To learn more about each one of these reports, visit the [Package Reports & Docs topic](#).

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Adding a New Package



To create a Package, begin in a Tour record and click on the “+ Package” button at the top of your screen, directly below the Tasks & Clients buttons. Initially, the Package will be named and dated the same as your Tour record; change either or both if appropriate. By example, if the Package represents a post-tour extension, the begin and end dates will be completely different from those of the Package set up for the basic tour.

Package/Option Name	Pkg Type	Primary?	Commission Level	Priced?	Published?	Booked?	Published to Web?
Core Package	PKG	Primary	None	Status: Reprice	Published	PAX	No
Tour Name	Tour #	Tour Code	Package/Option Description				
Explore Grand Rapids	18575	EXPGR06252023					
Start	Days	End	Nights	Division			
Sun, Jun 25, 2023	6	Fri, Jun 30, 2023	5				

Your Package will initially be “typed” as a PKG but there are alternatives. To explain each type:

AIR: If you want to separately show and bill for the cost of air transportation, create an AIR Package.

BUS: A Package containing just the motor coach component would be classed this way.

DRVR: This identifies the Package containing services that will be used by the driver.

INS: There are several ways that insurance can be sold in TourTools™. If the cost of coverage is what might be described as a “flat fee”, in other words not dependent on the cost of arrangements purchased by the traveler, their age, or other factors; then creating one or perhaps several Packages will work for you.

LAND ONLY: This would be the counterpart to your Air Package; i.e. a bundling of the rest of the tour services in a Package classed LAND ONLY.

OPT: Options which will be available in addition to the basic Package, pre- or post-tour extensions, by example, would be categorized as OPT.

PKG: A standard Package usually containing all components of what might be considered the “core” tour. This may or may not contain air segments.

STF_DBL/STF_SGL: These identify Packages that will be used by your tour manager or other staff traveling with the group.

✿ When you price a Package typed DRVR or STF SNG/DBL the Selling Price will display as zero, the logic being the driver is rarely and the staff (tour manager) never billed for their travel. In the event they are to be charged, then create Packages classed as PKG for them. To be sure, the Ops records related to these personnel Packages *will* reflect a cost and therefore the expense is considered as part of your P/L report. What you will *not* have is a

receivable in Bookings.

By default, your Package will also be set as “Primary” in the field so labeled. The alternative is to class the Package as “Other”. To explain the difference, an “Other” can’t be purchased without first confirming a “Primary”; the best example being a shore excursion on a cruise or a pre-tour hotel night. An “Other” Package would never be purchased on its own.

In the field labeled **Comm Level**, pick from the list of values to indicate the level at which this Package is to be commissioned. What you enter here relates to levels that you have assigned in the Client record *of* or a Booking related *to* an agency or a group leader. When the Package is sold *to* a Client identified as a Master Record or to a Client *linked* to a Master Record, a commission will calculate in the Booking record.

Before proceeding any further, you might want to already select or de-select the room types you plan to price and sell.

✿ If your Package contains a service or services that are per-person, in other words there is no room component only “Dbl/Opt” should be “turned on.”

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Cruise Packages

This section provides a detailed guide on setting up cruise packages in TourTools, focusing on managing cabin types, costs, and related services for cruise company vendors. Understanding how to input and manage these details will ensure accurate package creation and pricing.

Setting Up Vendor Records for Cruise Companies

1. Accessing Vendor Record:

- Navigate to the Vendor record section for the cruise company you are working with.

2. Creating Contracted Service Records:

- For each type of cabin you are holding on a given sailing, create a Contracted Service (CS) record.
- Enter the costs for single, double, triple, and quad occupancy based on your needs. Ensure these are inputted as PER ROOM, PER STAY.
- Inventory each cabin type to keep track of availability and bookings.

Creating Packages for Each Cabin Type

1. Initial Package Creation:

- Create a separate Package for each cabin type you offer.
- Start with one cabin type, including all the necessary services such as the CS record for the cabin, airfare, port charges, tips, taxes, and transfers.
- Ensure that all inclusions are based on the quotations and terms provided by the cruise line.

2. Duplicating and Modifying Packages:

- Once the first package is complete, duplicate it for other cabin types.
- Swap out the CS record to correspond with the new cabin type.
- Review and adjust other services as needed, though many will remain the same across different packages.

Additional Considerations

1. Prorating Expenses:

- If you need to prorate expenses for a tour manager or group leader over all packages, be aware this is a more complex process. It may require a “show and tell” session to fully understand and implement.

2. Dealing with Gross Rates:

- Some cruise lines quote gross rates with commissions paid upon sailing. If this applies to you, a dedicated video is available to guide you through the setup.
- Though more complex, understanding this process is crucial for accurate financial management and commission tracking.

Last modified: January 2, 2024

Itinerary Building

Navigate to the **Add Products / Services** tab to begin the process of building your itinerary.

Building an Itinerary

The next order of business is to build an itinerary, using the services that constitute the Package, and there are two ways to do this. The first method is to build the itinerary right out of the Package Module.

The Build from Package Method

You can build an itinerary by remaining in Package and going to the tab labeled **Add Products/Services**. What will present is a series of three tabs, inviting your selection by *Vendor*, or *Metro Area and Type*. *Vendor* will allow you to select from an alpha list of all suppliers; and *_Metro Area / Type* allows a dual pick on the Metro Area as well as the Type of service represented in the Contracted Service.

Once you make your selection, the Contracted Service records for the Vendor will be visible in the portal below.

You'll see there is a Day Pop-Up at the top of the screen, which can be used to load the **Start** and **End** dates in the same way, and there are fields to indicate the number of per-person (Quantity) and fixed (# Fixed) items. As explained on the previous page, the fields to the right—labeled Driver, Staff Sng, and Staff Dbl—will be auto-populated from Tours.

Main / Itinerary
Add Products / Services
Pricing
Terms & Conditions
Notes
Web
Operations
Reports

By Vendor
By Metro Area & Type

BUILD ITINERARY - BY VENDOR

Vendor: Click on the down-arrow symbol, then type the first few letters...

ADJUSTMENTS / COMPS

Start Day No. Load ▶ Start End Nights

Quantity # Fixed # Rollaway Driver(s) Staff Sng Staff Dbl

Set comp numbers here. Clear values if no comps to be calculated. Defaults are set in the Tour record.

CONTRACTED SERVICES ADDED - MOST RECENT

Adult Admission	06/26/23	Gerald Ford Presidential Museum	✉
Three Course Dinner including Gratuity	06/27/23	Sundance Grill	✉
Double-Double Rooms including Buffet Breakfast	06/25/23	JW Marriott Hotel	✉

CONTRACTED SERVICE SELECTION

Contracted Service Available	Date Begin	Date End	Inv	Avail	Dbl Rate	Adu Net	Fixed Rate
Add Three Course Dinner including Gratuity	Sun 1 Jan 23	Sun 31 Dec 23	off	off		27	

To load the service to the itinerary, simply click on the “Add” button preceding the description of the Contracted Services record.

The extra field, labeled Nights (upper right), can be used to load successive hotel nights that have been loaded as individual Contracted Services records. For example, imagine there are Contracted Services records for overnights on June 25, June 26 and June 27. If we type “3” as the number of nights, set the beginning/ending dates to June 25/26 and select the June 25 price element record, that and the June 26 and June 27 elements will be swept into the itinerary.

Reference the “mini itinerary” on the left to see what’s been loaded. When you finish loading all services, click back on the “Main Itinerary” tab.

The Attach Method

An alternate method for building an itinerary, would be the **Attach Method**.

From Package, click on the (back to) “< Vendor” button and, once in the Vendor database, find the first Vendor whose services you want to add. It makes some sense to attach records in the order they are going to be presented on tour, in other words, your motorcoach might be added first, followed by your first lunch stop, dinner and then a hotel overnight.

CURRENT TOUR# & PACKAGE#			
Go & View Tour	22129	Discover Savannah	
	Tour #	Tour Name	
	Sun 1 Jul 18	Mon 30 Jul 18	
	Start Date	End Date	
Go & View Package	13898	Discover Savannah; Three Nights	
	Pack#	Package Name	
	Sun 1 Jul 18	Wed 4 Jul 18	
	Date Begin	Date End	

In the Vendor record, open the

Product record and then the Contracted Services record representing the service in question, or create whatever product you need. Notice in the upper right-hand corner of the layout reference to the Tour and Package that you are building.



Click on the “Attach” button (located to the right of the details of the Contracted Services record) to proceed.

What you will see next is the Confirmation screen. If your service is inventoried for a specific date or date range, the **Begin** and **End Date** will have set themselves. If that doesn’t happen, you need to set them manually by

PACKAGE / OPTION DESCRIPTION						
Discover Savannah; Three Nights	Sun 1 Jul 18	Wed 4 Jul 18	4	3	22129	
Package/Option Name	BeginDate	EndDate	# Days	# Nights	Tour#	
GRP	13898	DISCSAVTEMP	Discover Savannah	Savannah		
Pricing Model	Package Number	Tour Code	Tour Name	Product Descriptionx		
<div>Package/Option Description</div>						
<p>PLEASE CONFIRM THE FOLLOWING FOR THE NEW RECORD:</p> <div> <div>Double Doubles Rooms Including Breakfast</div> <div> <div>Sun, Jul 1, 2018</div> <div>Day of Tour</div> <div>X STOP</div> <div>OK →</div> </div> </div> <div> <div>Proposal & Itinerary Description</div> <div> <div>Wed, Jul 4, 2018</div> <div>Driver(s)</div> <div>● 0 ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6</div> </div> </div> <div> <div> <div>1</div> <div># Per Group FX Required (e.g. bus or escort)</div> </div> <div> <div>1</div> <div>PP Quantity</div> </div> <div> <div>● 0 ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6</div> <div>Staff Singles</div> </div> <div> <div>○ 0 ○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ○ 6</div> <div>Staff Doubles</div> </div> </div> <div> <div>Proposal / Voucher Notes</div> </div>						

either clicking in the field to type the date, or pick from the calendar. You can also use the **Day of Tour** pop up. Click the *number* of the day you want to set as the Begin Date, then click on the load button in front of that field. By default, the End Date will set similarly; if that is not correct, re-set it by repeating the process.

The next thing you want to consider is whether you need to sell multiples of the service. If your service was a lunch voucher, by example, and you wanted to sell three of them without specifically assigning them to three different dates, set the first date and then input “3” in the **PP Quantity** field. Do the same if the service is a fixed cost item—a motorcoach, by example—by changing the figure that displays in the **# Per Group FX Required** field.

The series of buttons labeled “Driver(s)”, “Staff Singles” and “Staff Doubles” are all about comps that need to be provided for in your pricing. In our example, the Contracted Services record about to be attached is for a Room. If you know that the hotel is going to give you a free or discounted room for your driver but not your tour manager, then you may want to click on the “1” button above “Staff Singles” to indicate that when the Package is priced, the cost of a single room needs to be prorated over the paying participants and added to the bottom line as a cost.

The screenshot shows the TourTools interface with the following fields and controls:

- BeginDate:** Sun, Jul 1, 2018
- Day of Tour:** A dropdown menu.
- EndDate:** Wed, Jul 4, 2018
- Driver(s):** Radio buttons for 0 through 6, with 1 selected.
- Staff Singles:** Radio buttons for 0 through 6, with 1 selected.
- Staff Doubles:** Radio buttons for 0 through 6, with 4 selected.
- # Per Group FX Required (e.g. bus or escort):** A text input field containing the number 1.
- PP Quantity:** A text input field containing the number 1.
- Buttons:** A red "STOP" button and a green "OK" button.

Note: The buttons referenced in

the previous paragraph and pictured again on the left will auto populate with the number that has been input in the corresponding field in Tour (shown below). If you prefer that they not auto-populate, wait to enter the number of tour personnel/group leaders anticipated on the trip in the Tour record until *after* you finish setting up your Packages.

The screenshot shows the "NUMBER OF SEATS" section with the following details:

- Section Title:** NUMBER OF SEATS
- Instruction:** (Load Driver and Staff Fields to Set C
- Blocked:**
 - Passengers: 52
 - Driver(s): 1
 - Staff Sgls: 1
 - GL Dbl: (empty)
- Booked:**
 - Passengers: (empty)
 - Driver(s): (empty)
 - Staff Sgls: (empty)
 - GL Dbl: (empty)

When each of the fields is set correctly, click on the "OK" button. If for any reason you need to back up, just click on "Stop".

Build the entire itinerary by cycling through Vendor records in this same manner, and once you finish, use the "< Back" button to return to Package. Note that it's also possible to temporarily return to Package for a quick look at the itinerary by using the button "Go & View Package" in the upper right of the screen. If, for any reason, you want to have a glimpse of the Tour record, use the "Go & View Tour" button.

Managing/Adjusting an Itinerary

Back on the **Main Itinerary** tab in Package, you'll notice that each Contracted Service record – now referred to as a "Package Element" – has been assigned an order number. Regardless of the order in which you loaded them, by default, TourTools will sort your records by departure date, but you can rearrange same-day services by changing the order numbers. Just overwrite what's already there, click outside the field, and your records will shuffle. Click the "Prop Omit" button for any services that you don't want to appear on the proposal or itinerary; tour manager per-diems, by example.

Main / Itinerary	Add Products/Services	Pricing	Terms & Conditions	Notes	Web	Operations	Reports																																																																																																								
<h2>REVIEW/MANAGE ITINERARY</h2> <div> <div>Duplicate</div> <div> Package Bookings <table> <tr> <th># Trav</th> <th>Adults</th> <th>Kids</th> <th>Single</th> <th>Double</th> <th>Triple</th> <th>Quad</th> </tr> <tr> <td>4</td> <td>4</td> <td>0</td> <td>0</td> <td>2</td> <td>0</td> <td>0</td> </tr> </table> </div> </div> <table> <thead> <tr> <th colspan="2">PACKAGE ELEMENTS</th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> <tr> <th>Vendor</th> <th>Description</th> <th></th> <th>Date Begin</th> <th></th> <th>Lock</th> <th></th> <th>Date End</th> <th></th> <th>Order</th> <th>Prop Only</th> <th>Prop Omit</th> <th>Contract Rec'd</th> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td> JW Marriott Hotel</td> <td>Double-Double Rooms including Buffet Breakfast</td> <td>—</td> <td>Sun, Jun 25, 2023</td> <td>+</td> <td>Lock</td> <td>—</td> <td>Fri, Jun 30, 2023</td> <td>+</td> <td>3</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Replace</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td> Friends Tours, Inc</td> <td>Tiberias 4 star hotel</td> <td>—</td> <td>Sun, Jun 25, 2023</td> <td>+</td> <td>Lock</td> <td>—</td> <td>Mon, Jun 26, 2023</td> <td>+</td> <td>9</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Replace</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td> Sundance Grill</td> <td>Three Course Dinner including Gratuity</td> <td>—</td> <td>Tue, Jun 27, 2023</td> <td>+</td> <td>Lock</td> <td>—</td> <td>Tue, Jun 27, 2023</td> <td>+</td> <td>7</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Replace</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>								# Trav	Adults	Kids	Single	Double	Triple	Quad	4	4	0	0	2	0	0	PACKAGE ELEMENTS																		Vendor	Description		Date Begin		Lock		Date End		Order	Prop Only	Prop Omit	Contract Rec'd						JW Marriott Hotel	Double-Double Rooms including Buffet Breakfast	—	Sun, Jun 25, 2023	+	Lock	—	Fri, Jun 30, 2023	+	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Replace					Friends Tours, Inc	Tiberias 4 star hotel	—	Sun, Jun 25, 2023	+	Lock	—	Mon, Jun 26, 2023	+	9	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Replace					Sundance Grill	Three Course Dinner including Gratuity	—	Tue, Jun 27, 2023	+	Lock	—	Tue, Jun 27, 2023	+	7	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Replace				
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You can view and rearrange Package inclusions on this screen. You can also swap out one Vendor service for another using the “Replace” button. When doing so, the original component is deleted, and the List by Name screen will appear. The system assumes you want to replace with a service from the same Vendor, so those choices appear initially, but you can select another Vendor if that is appropriate. The functionality from there is exactly as what you experienced when you built the Package originally.

Tue, Jun 27, 2023 Lock Tue, Jun 27, 2023

If a replace is needed simply because you want to change the date, you can use the buttons labeled with the plus and minus signs that precede and follow the start and end dates. In this example, if you wanted the third service to be June 26 instead of June 27, you could click on the — signs as indicated. Obviously, this will work only in cases where the Contracted Services record has been set up with wide ranging usage dates.

The button between the dates is by default labeled “Lock”. If for whatever reason you want to signal that the date should not be altered, click it (at which point the label will toggle to “Unlock”).

This functionality will not work in instances where the revised date would fall outside the parameters of the Package, if the service has been inventoried back in Vendor, or if Ops records have already been loaded. In such a case, you may be able to do a “Replace”.



The “Delete” button will be used when you simply want to get rid of a Package component.



If you click on the “up-arrow” icon preceding an itinerary entry, you are presented with what is called a “Package Element” record.

Main			PP/Group Rate		Room Rates	
SERVICES Vendor: JW Marriott Hotel Type of Service: Hotel Description of Service: Double-Double Rooms including Buffet Breakfast Default Currency: USD Ex Rate: \$1.00000 Date Service Begins: Sun 25 Jun 2023 Time Service Begins: Date Service Ends: Fri 30 Jun 2023 Time Service Ends: Tour #: 18575 Tour Code: EXPGR06252023 Package #: 15926 Tour Name: Explore Grand Rapids Vendor #: 4702 Price/Inv #: 72178 PDR Category: BED			INVENTORY Type of Inventory: RM Adults Booked: 4 Rooms Booked: 2 # Pax: 52 # Single / Double Rooms: 5 From Tour Master: 52, 5, 25 On This Package: 0, 0, 2 Total Using This Vendor Product: 0, 0, 2 Price Lock: 0 # Pax Available: 0 # Single / Double Rooms Available: 5, 18 # Driver: , # Staff Sgl: , # GL: , Totals:			
Proposal / Voucher Notes Proposal Notes from Vendor						

On the first tab, you can reference some basic information, including the Contracted Services record to which it is associated. If the service has a per-person or a fixed cost component to it, click the second tab to reference those details. If it is a room record, click the third tab.

Basically, these screens allow you to reference Contracted Service details without having to go back to Vendor. In addition, numbers having to do with inventory counts in the Tour or the specific Package are visible, and the fields labeled “Total Using This Vendor Product Item” will show the total of passengers or rooms using/sharing the same Contracted Service record; not necessarily on just this tour.

The fields adjacent to the label “Comps Required” reflect the number of comps that were factored in for tour personnel when the particular Contracted Services record became part of the itinerary. If you want to change these numbers, the fields are open to entry which basically spares you having to go through the process of replacing it in order to change the comp allowance. Be aware that if you do make alterations here, the Package “Priced? Status” will go from OK to “Reprice”, since—as mentioned previously—the change you make affects the selling price.

There are three buttons at the top of the screen: Continue, Update Exchange, and Update Prices.

Continue

The Continue button will take you back to the Package Details view.

Update Exchange

The “Update Exchange” button will be used in instances where the foreign currency exchange rate as originally used to price your Package has changed significantly enough that you want to see the impact on your profit margin. Here, the process is to first update the exchange rate in the “USD (Costing)” field back in Currency, open up the Package Element, and click on the “Update Exchange” button.

Update Prices

“Update Prices” will be used in instances where your Vendor cost has significantly changed. After changing the cost in the Contracted Service record, open the

associated Package Element and click on the “Update Price” button to sweep in the revised cost.

Note that any time you do something within Package that affects the selling price, TourTools will prompt you to choose between altering the net or the selling cost of the Package. As an example, if a restaurant used in a Package increased the dinner cost by \$5.00 and you updated that cost in Package, you would have the option of eating (no pun intended!) the increase or passing it on to your travelers. By picking “Net” at the prompt, your net cost would increase (lowering your profit margin) but your selling price would remain the same. If you opt to increase the selling price, you will be prompted to re-price the Package. In cases where the Package is already published and has been sold, the Package price in any Bookings previously made will be increased.

✿ When these sorts of changes occur, it is your choice to update your Package price or not; it is not absolutely necessary. The choice will have everything to do with how dramatically the change affects your selling price, either positively or negatively. Whatever you choose to do, the price as reflected in a Contracted Services record in Vendor is the price that will be reflected in Ops as the flow of data from Vendor to Ops is direct.

At the point your itinerary is complete, you are ready to price and publish.

Quick Setup Method for Packages

✿ Note: This is an alternative method for setting up a Package, usually done in the interest of saving time. Be aware that using this process, while quick, will limit or prohibit the use of certain TourTools v5 features.



<https://player.vimeo.com/video/810674330>

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Package Pricing & Publishing

Navigate to the **Pricing** tab in the Package being built to begin the pricing and publishing process.

Room Types Included:	SINGLE	DOUBLE/OPT	TRIPLE	QUAD	CHILD	EXTRA BED/PER
<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input checked="" type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No	<input type="radio"/> Yes <input checked="" type="radio"/> No
Sell Prices:	\$750.00	\$625.00	\$583.33	\$562.50	\$0.00	\$0.00

By clicking on the Details button on the right-hand side of the screen, you can see the Cost Factor has been populated from the Cost field on the front page of Tours and can be changed here (the updated figure does not re-populate the field back in Tours). This is the number of passengers over which any of your fixed costs will be pro-rated.

Package Comps		Tour Comps		
Tot Comp Costs	Comp Description	Amount	Factor	SubTotal
\$2,132.00	GL Package	\$533.00	4	\$2,132.00
Pkg Comp PP				
\$53.30				

If this Package is commissionable, enter a percentage in the field labeled Comm.

- When you enter a percentage here, you are making allowance for the possibility that a commission will be paid on the Package and, more than anything else, setting aside some money for that eventuality. Your entry does not lock in the amount of that percentage; that value is set in Bookings. In other words, you might enter .10 here and over in Bookings pay one re-seller 8% percent and another 12%. Note, too, that entering a figure here will—in combination with the percentage entered in the Margin field—bump the net cost of all services in the course of establishing a selling price. This is different than the commission question addressed earlier. That entry sets the stage for a commission to be paid on a Booking; here, you are actually setting aside the money needed to cover that payment.

In the Margin field, indicate your margin of profit; again, a decimal entry.

- A margin of profit is arrived at by asking the question, if the combined net value of the services that constitute the Package represents 80% (my desired margin of profit being

20%), what figure represents 100%? The calculation that takes place is: $100 / 80 = 1.25$. So multiplying \$100 in goods x 125%, your selling cost would be \$125. By contrast, a markup is just that...you are simply marking up your net cost by a certain percentage. In that scenario, $\$100 \times 20\% = \20 ; added together your selling cost is \$120.

! To be sure, TourTools calculates selling costs using a margin and not a markup.

The numbers you see in the fields labeled Comps to Budget in Package are populated from the similarly-named fields back in Tours and are what you saw as you considered the question of allowing for comps when you linked Contracted Service records to the itinerary using the “Attach” or “Build from Package” process.

Net Rate Sheet
PP Calc Rate Sheet

PACKAGE PRICE INFORMATION

Price & Publish

☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☒ Yes ☐ No
☐ Yes ☒ No
☐ Yes ☒ No

SINGLE

DOUBLE/OPT

TRIPLE

QUAD

CHILD

EXTRA BED/PER

Set Price

Sell Prices	\$750.00	\$625.00	\$583.33	\$562.50		
Net	\$633.00	\$508.00	\$466.33	\$445.50	\$125.00	
Profit & Comm	\$117.00	\$117.00	\$117.00	\$117.00		
Margin	15.60%	18.72%	20.06%	20.80%		

Adjusted Prices

Adjust

Publish

Unpublish

When you're ready to establish your selling prices, click on the Set Price button. The net value of all services—including comp allowances—will be swept to the Net fields, and the combined total of your profit margin and allowance for commission will show in the Profit & Comm fields. The two amounts combined will populate the Sell Prices fields, and the resulting percentage of profit/commission—after rounding—will be reflected in the fields labeled Margin. If you want to adjust the suggested selling prices, enter your preferred amounts in the Adjusted Prices fields, click on the “Adjust” button, and the numbers will refresh.

You'll note that the selling as well as net costs are stored at the bottom of the screen. If you want to make a comparison of prices based on varying passenger counts, simply change the number in the “Cost Factor” field and re-price the Package. When you determine which prices you actually want to lock in, click on the “Select” button to re-load the figures to the active area.

PACKAGE PRICES AND COST FACTORS

	Single	Double/Opt	Triple	Quad	Child	Extra Bed/Per
<div> <div>Select</div> <div> Cost Factor 50 </div> </div>	Sell: \$781.00 Net: \$633.00	\$625.00 \$508.00	\$573.00 \$466.33	\$547.00 \$445.50	\$125.00	

* A note about Child pricing: If the Package includes accommodations, the system assumes the child will share a room with their parents and does not sweep any room costs into the price. If any of the Contracted Services records included in the itinerary have Child prices loaded, those will be used (in the absence of Child prices, the Adult/Student rates from Vendor will be used). Finally, the child will share in the cost of any fixed-cost services.

There is an alternative for calculating the cost of comps needed for your tour personnel, as compared to what was explained as part of the “Attach” or “Build from Package” methods, and that is to use the fields you see in the center of the Prices layout.

Package Comps		Tour Comps		
Tot Comp Costs	Comp Description	Amount	Factor	SubTotal
\$2,132.00	GL Package	\$533.00	4	\$2,132.00
Pkg Comp PP				
\$53.30				

The process goes as follows: As you use either of the two methods to build the itinerary, do not make any allowance for comps. After building the Tour Manager and Driver Packages, reference their costs, and enter them—as shown in the example—on the Package Comps tab of whichever Package(s) need to cover the cost for personnel. This method allows you to pick and choose which Packages will share in these costs but is a little less “sharp pencil” than the alternate approach, given you are not considering and making allowance for the comps that may accrue to you from the Vendor as you attach each individual service to the Package.

Describe the “what” in the Comp Description field, the cost in the Amt field, and indicate “how many” in the Fac field. The Subtotal will calculate automatically, and the total will populate the field labeled Tot Comp Costs. That amount will be prorated over the number indicated in the “Cost Factor” field and the resulting figure, representative of the amount that each paying passenger needs to contribute—will display in the Pkg Comp PP field.

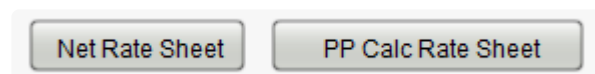
Apply Comps At

Tour

Level

In cases where you have charges that need to be swept into several Packages associated with a particular tour, the procedure differs slightly. The best example of this application is a cruise, where you have multiple Packages representative of various cabin types; all of which have different selling prices and all of which need to include a prorate to cover the escort’s air, port charges and taxes. In such a case, make entries as described above in any one of the Packages records but on the Tour Comps tab. Then enter the total number of travelers over which the cost(s) should be pro-rated in the “Tour Cost Factor” field, set the “Apply Comps At” field to “Tour” and then pick that same value in all other Packages

that should share the expense.



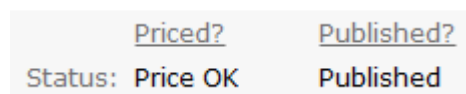
Before signing off on the pricing, you will want to study closely and perhaps print and file these two reports. The Net Rate Sheet reflects data as captured in the Contracted

Service records that make up the Itinerary. Check it carefully to make sure all the entries are correct. The PP Calc Rate Sheet reflects all of the “raw data” from the first sheet, impacted by factors like currency exchange rates, number of persons in a room, number of nights, etc.

Before proceeding any further, double check which room types you plan to sell by selecting/ de-selecting the Yes/No options displayed. **Note: If your Package contains per-person and/or fixed services but no room component, only “Dbl/Opt” should be “Yes”.**

Moving on, the last thing you will do is click on the Publish button, which makes the Package available for viewing and sale in Bookings. If you have created multiple Packages, it is possible to publish them all at once by clicking on the button labeled “Publish All.”

After publishing, you will be asked if you want to load Ops records. It is suggested you always answer in the affirmative. Ops records can otherwise be loaded manually using the “Load Ops” button at the top of the Package List View.



Finally, once your Package is priced and published, this is what the status fields at the top of the screen will reflect.

The alternative is a “Re-Price” indicator, which is a tip-off that 1) the Package hasn’t been priced; 2) the itinerary has been altered—something has been added or removed; or 3) the cost of a Package Element has been changed.

Pricing & Comps in TourTools

Package Details

Copy Tour to New Dates

Ignore Weekday/Weekend Check

PACKAGE DESCRIPTION

Nashville Daytrip Tue 1 Dec 20 Tue 1 Dec 20 1 0 40264

Package Start End Days Nights Tour #

2000111NASH7AB 53254 Fri, Oct 2, 2020 Nashville Daytrip Nashville, TN

Tour Code Package # Expiration Tour Name Product Description

VENDOR INFORMATION

Package Bookings # Trav Adults Kids Single Double Triple Quad Closed Out? Options Price

Vendor	Description	Date	EndDate	Order	Onset from Proposal
Southern Escape Tours - Nashville	Stop-On Tour Guide- 8 hours	Tue 1 Dec 20	Tue 1 Dec 20	1	
Country Music Hall of Fame & Museum	Adult Group Tour (self-guided)	Tue 1 Dec 20	Tue 1 Dec 20	3	

<https://player.vimeo.com/video/836332974>

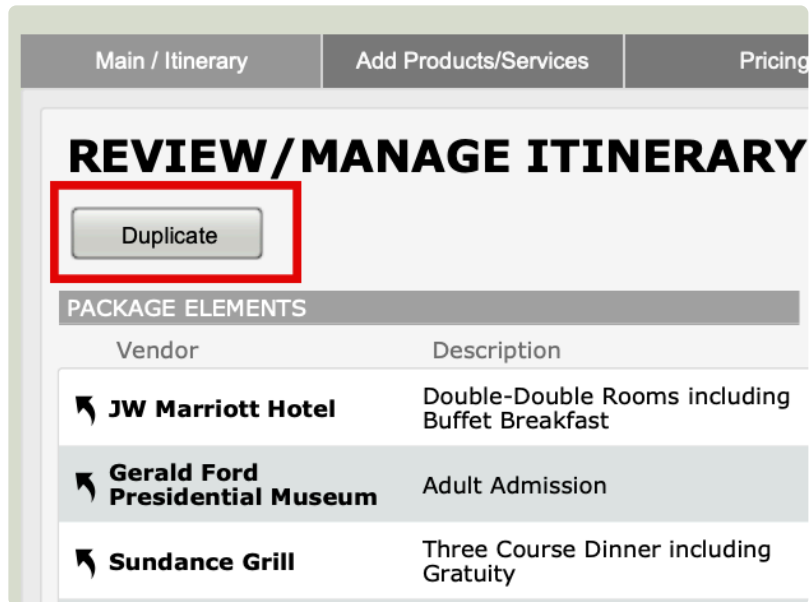
If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: June 14, 2023

Duplicating a Package

There are many instances where one Package will be identical to another with an exception or two. Rather than having to build each from scratch, you are able to use the “Duplicate” function; another huge time saver.

You will find the **Duplicate** button at the top left of the **Main / Itinerary** tab in the Package Detail view.



The duplication script will, in a matter of seconds, create an exact copy of the Package for you, which will be tagged with the word “Duplicate” in the name field. Change the name as necessary, and then use the “Replace” or “Delete” buttons on the Itinerary tab to swap out or completely eliminate Package Elements that don’t belong.

A common application of this process will be to create a “core package” that includes all services that constitute the basic tour. Once that itinerary is built, you are able to duplicate the Package and strip out or add services that you need to provide to the tour manager accompanying the group. Once that Package is complete, duplicate it to account for the services that the driver requires.

DEMO: Tour & Package Duplication in TourTools

We will be updating this video to demo the process in v5 instead of v4 – but the process is very similar!

<https://player.vimeo.com/video/660230969>

<https://player.vimeo.com/video/660230969>

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Creating & Managing Proposals

Proposals are Packages that may include “real” Vendor services or “generic” services created solely for generating cost quotations

To start the process, from the record of the Client to whom you are making the Proposal, click on the “+Proposal” button.

The screenshot shows the 'Client Details' form in the TourTools application. The top navigation bar has four buttons: '+ Client', '+ Booking', '+ Proposal' (highlighted with a red box), and '? Availability'. Below the navigation bar is a section titled 'Client Details'. On the left, there is a sidebar with a 'DETAILS' button and a star icon. The main form area contains the following fields:

- Primary Contact:** A star icon and a 'DETAILS' button.
- Title:** A text input field.
- First Name:** A text input field containing 'Lynne'.
- Last Name:** A text input field containing 'Stolk'.
- Business/School/Group:** A text input field containing 'Lynne's Happy Campers'.
- Primary Email Address:** A text input field containing 'lynne@happycampers.com'.
- Preferred Contact Method:** A dropdown menu with 'Email' selected.
- Mailing Address:** Radio buttons for 'Home', 'Business', and 'Don't Mail'.
- Home #:** A text input field.
- Cell #:** A text input field containing '(456) 789-1111'.
- Work #:** A text input field.
- Primary #:** A dropdown menu with 'Cell' selected.
- Home Address:** A text input field.
- Client Categories:** A list of checkboxes:
 - ☒ Group Leader
 - ☐ Decision Maker
 - ☐ Individual Traveler
 - ☐ Other
 - ☐ Payer
 - ☐ Tour Operator

At the bottom of the form, there are four tabs: 'Notes / Activity', 'Business / Group', 'Marketing', and 'Bookings / Proposals'.

This will open the Tours Module where you will create a record just as outlined in Chapter 4. The only exception is that these records will be tagged with a “Proposal” rather than “Active” status.

When you select the “+ Package” button to continue, you will be asked if you want to create a new Package or duplicate an existing Tour and Package(s). If you elect to build a new Package, the process is exactly the same as outlined in the previous section on [Adding a New Package](#), with the exception that Proposals are never published. **If you intend to duplicate an existing Tour, remember to first reconfirm its status as being “Template”.**

Tour Details

Bahamas Cruise

Tour Code: CRU08282023 Name: Bahamas Cruise Start Date: 08/30/23

Tour Type: Cruises and Coastlines Destination: Bahamas Closed: Tour #: 18578

Main / Notes Prices / Avail Pay Deadlines Cruises Groups Buses Flights

NUMBER OF SEATS Tours to Control **CLIENT**

If you tend to send a lot of quotations for the same or very similar types of tour, you might want to consider creating Tour/Package records as *permanent* templates that can be copied over and over again. Chapter 4 outlines the specifics of [Tour Duplication](#); using it will save you an endless amount of time.

Something else to consider is creating “generic” or “Proposal Only” *Vendor* records and/or *Product records within the Vendor Library*, whose Contracted Services records will be used over and over again in multiple quotes. An example is to create a Vendor called “Orlando Hotel”, whose notes might reference the fact that accommodations will be provided at Hotel X, or Hotel Y, and whose cost would be a good approximation of what you would expect to have to pay for accommodations at either property.

If the Client for whom the proposal is being prepared asks for “tiered pricing”, create and price a “base” Package, duplicate and price it a second, third or fourth time using a different “Cost Factor” each time. To select the variations to be included in the proposal, go to the List View layout and click the “Prop Inc” box on the far right. For obvious reasons, you will not publish any Packages related to a Tour tagged as “Proposal”, in fact you are prohibited from doing so if any of the Contracted Services included in the itinerary are marked as “Proposal Only” back in Vendor.

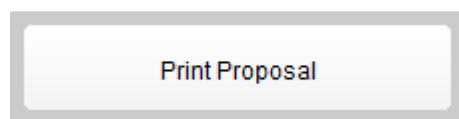
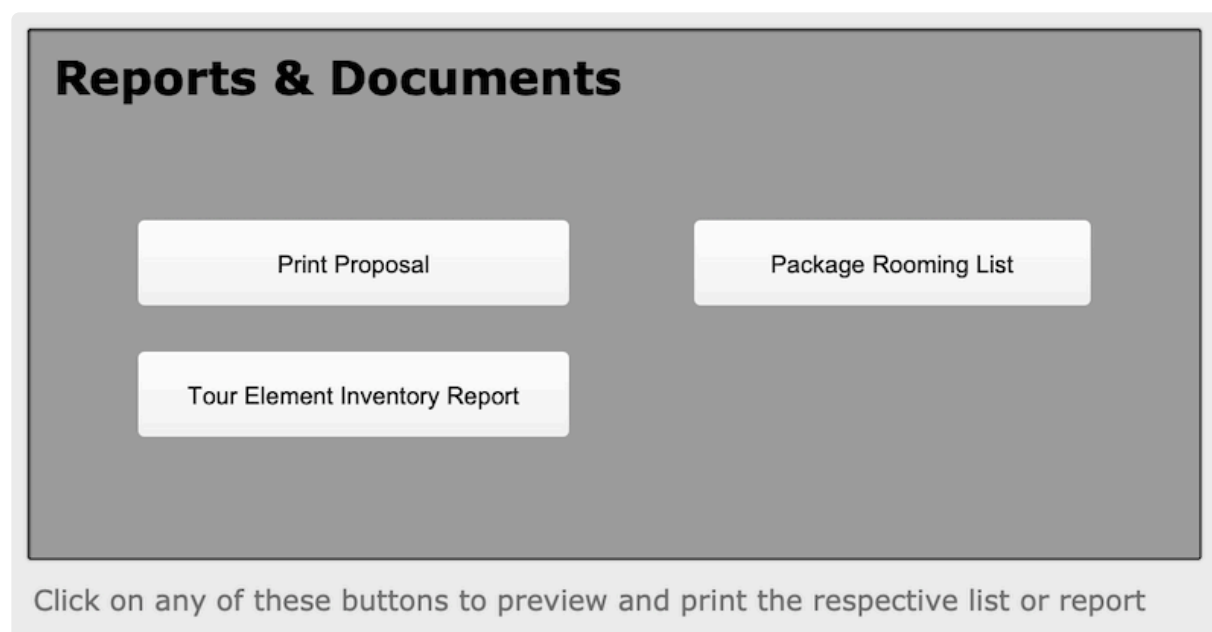
At the point it becomes a “real” tour, what you might want to do is use the tour duplicate function to replicate the services in a uniquely coded and perhaps newly-dated Tours and Packages. If generic services were used in the itinerary, all you have to do is swap out the proposed services for the real thing once they are confirmed.

If you create a Package using real services and *nothing* changes at the point it turns from a Proposal to a sold tour, all you would have to do is publish the Package(s), at which point the status of the Tour record will change from Proposal to Active, which makes it available to see and sell from Bookings.

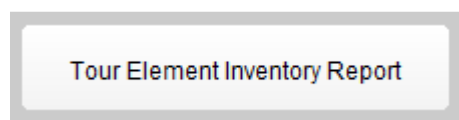
If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

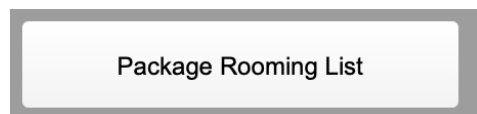
Package Reports & Docs



This is the document that can be printed and/or emailed to your Client. Before generating a proposal, you must select which Packages/prices you want to appear on the Proposal, as explained in the previous section.



This report shows what services are included in the Package and the availability of each. This is the same report can be run from Bookings and is usually what you reference when a waitlist occurs.



Use this button to run a rooming list for any Package that has been published as part of an Active Tour.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Chapter 6: Bookings

The Bookings Module – Where the Rubber Meets the Road

All of your work to this point, negotiating with Vendors, planning/building Tours and Packages, and marketing them – it all leads to the Bookings module and from there to the Operations and Money modules.



Detailed booking records reflect Packages and options purchased, payments due and received, and other data related to the reservation.

The booking process usually begins in the Client module, where your first order of business is to find (or create) the Client record to which the booking is to be linked.

As appropriate, if you haven't already done so, address the question of whether the reservation will be for a group leader or re-seller, in which case the Client record should be marked as a GL Master; whether (at what percentage) the reservation should be commissioned and whether a salesperson is to be credited with the booking. So long as the Client record is "Active," you are good to proceed.

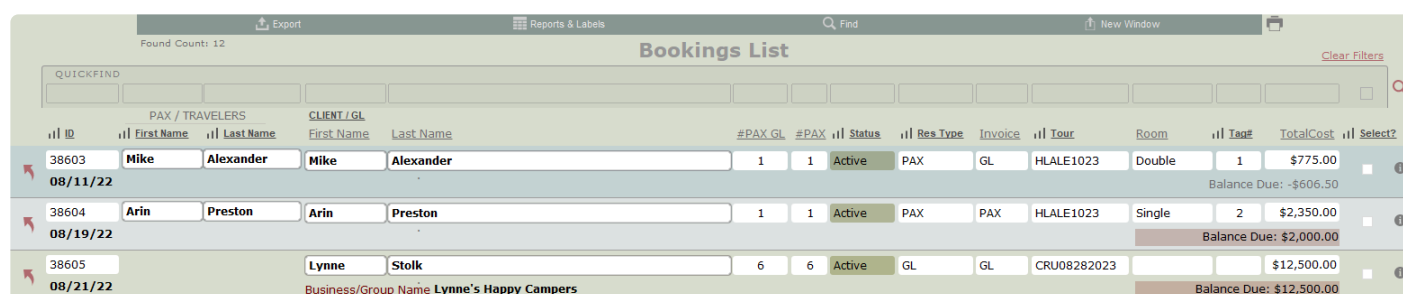
Last modified: March 27, 2023

Bookings Module – List View

This section of the User Guide is still undergoing updates. Thanks for your patience!

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

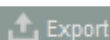
All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.



ID	First Name	Last Name	Client / GL	Status	Res. Type	Invoice	Tour	Room	Tax	Total Cost	Select
38603 08/11/22	Mike	Alexander	Mike Alexander	Active	PAX	GL	HIALE1023	Double	1	\$775.00	
38604 08/19/22	Arin	Preston	Arin Preston	Active	PAX	PAX	HIALE1023	Single	2	\$2,350.00	
										Balance Due: -\$606.50	
38605 08/21/22		Lynne	Stolk	Active	GL	GL	CRU08282023			\$12,500.00	
										Balance Due: \$12,500.00	

Feature Buttons

Export



Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

Reports & Labels



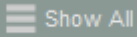
Use this button to navigate to the Bookings Reports tab. Learn more about the reports and labels on this tab in the [Booking Reports & Docs topic](#).

Find



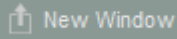
You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen. When you are ready to initiate the process, click on the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

Show All



Eliminates any filters you have on your list and shows all Bookings. This button only shows when you are in a found set and NOT viewing all records.

New Window



Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Bookings Module – Detail View

This section of the User Guide is still undergoing updates. Thanks for your patience!

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Booking.

Feature Buttons



List View

Use this button to return to the Bookings List View.

< Clients

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Client module and show all clients related to this Booking.

< Tours

Use this button to jump to the Tour module and show all Bookings.



< GL Agents

Use this button to jump to the Group Leader Agents for this Booking.

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Tour Details Layout

Record 2 of 15

Booking Details

Record ID 38604

BOOKING / PAX INFO: Mike Alexander 10-Day Holy Land Tour Arin Preston

Select/View Booking

- Mike Alexander 10-Day Holy Land Tour
- Mike Alexander PAX/GL 1
- Mike Alexander 10-Day Holy Land Tour
- Arin Preston PAX/PAX 1
- Bahamas Cruise
- Lynne Stolk GL/GL
- Bahamas Cruise
- Joseph Fitzgerald PAX/PAX 2
- Explore Grand Rapids
- Fred Flintstone PAX/PAX 2
- Explore Grand Rapids
- Joseph Fitzgerald PAX/PAX 2
- DC Performance Tour
- Susan Smith GL/GL
- DC Performance Tour
- Susan Smith GL/GL 1
- DC Performance Tour
- Tommy Thompson PAX/GL 1
- DC Performance Tour
- Joseph Fitzgerald PAX/PAX 2
- DC Performance Tour
- Mike Alexander PAX/PAX 1
- Mike Alexander 10-Day Holy Land Tour
- PAX/GL
- DC Performance Tour CXL

CURRENT FOUND SET

BOOKING DATE BOOKED: 08/19/22 **CONFIRMED** STATUS: ACTIVE

Room Type	# Pax	Tag#	Roommate?	Roommate Name	Total Cost	Total Paid	Balance Due	Due By	Comm Due	Type Booking
Single	1	2			\$2,350.00	\$700.00	\$2,000.00	09/21/23		PAX

Driver(s) Staff Singles Account Manager Source
 Arin Preston ABA Conference
 Staff Doubles: Salesperson Segment
 2021

TOUR

Tour Name Mike Alexander 10-Day Holy Land Tour Tour Begins 10/12/23 Tour Ends 10/21/23
 Tour # 18577 Tour Code HLALE1023 Division

PAX

First Name	Last Name	Add/Remove	Nickname	Birthdate	Sex	Age	Email Address	Email	Meals
Arin	Preston	+	AJ				arin@datavast.net		

Main Notes Prices / Options Payments / Refunds Fundraising Contact Details Group / Agency Flights / Buses Email Log Tasks / Docs Reports / Invoices

BOOKING NOTES

Tour Notes (Internal Use Only)

Pax Hotel Notes

Booking Notes (Internal Use Only) Enter note here & click the pencil button to the right to save

Return Manifest Notes

To keep things simple, we're going to address first of all the information seen on the top half of the Booking record. After that, we'll go tab by tab through the bottom section.

BOOKING DATE BOOKED: 08/19/22 **CONFIRMED** STATUS: ACTIVE

Room Type	# Pax	Tag#	Roommate?	Roommate Name	Total Cost	Total Paid	Balance Due	Due By	Comm Due	Type Booking
Single	1	2			\$2,350.00	\$700.00	\$2,000.00	09/21/23		PAX

Driver(s) Staff Singles Account Manager Source
 Arin Preston ABA Conference
 Staff Doubles: Salesperson Segment
 2021

TOUR

Tour Name Mike Alexander 10-Day Holy Land Tour Tour Begins 10/12/23 Tour Ends 10/21/23
 Tour # 18577 Tour Code HLALE1023 Division

PAX

First Name	Last Name	Add/Remove	Nickname	Birthdate	Sex	Age	Email Address	Email	Meals
Arin	Preston	+	AJ				arin@datavast.net		

Booking Details This section at the top is where you will find the room type, number of passengers, rooming tag number, and marketing details (source/segment – what prompted the booking). You will also see information indicating if the booking is for staff. Along the top you will see the date of the booking as well as the current status and, below, a summary of payments and balance due.

Tour Details This section at the top left is where you will find related Tour information as well as which **Division** the Tour/Booking was sold under.

PAX Details This section at the top left is where you will find each of the passengers listed, along with some of their primary information. To open the details for a given passenger, click the up-arrow button to the left of the name (see example below)

Cruise Details This section at the top right is where you will find details related to the cruise, if the booking is for a cruise.

PASSENGER KEY INFO							TOUR / BOOKING INFO		
Title	First Name	Middle Name	Last Name	Name on Name Tag	Nick Name	Tag #	<u>Tour Name</u>	<u>Trav Num</u>	
	Alex		Preston	AJ	AJ	2	Mike Alexander 10-Day Holy Land Tour		
Email Address alex7654@gmail.com							<u>Tour Code</u>	<u>Reservation #</u>	<u>Cancel Date</u>
							HLALE1023	38604	

Main / Passenger Details	Linked Client	Meal Selections	Fundraising Distributions	Reports																																																																																																
<h3>PASSENGER DETAILS</h3> <p>If the passenger name in this record is not from a linked Client record, load the passenger details manually on the passenger details tab below.</p> <table> <tr> <td>Height</td> <td>Weight</td> <td>Gender</td> <td>T-Shirt Size</td> <td>Medical Conditions</td> <td>Mobile Phone</td> </tr> <tr> <td>6' 2"</td> <td>165</td> <td>M</td> <td>XL</td> <td></td> <td>(330) 556-9874</td> </tr> <tr> <td>Birthdate</td> <td>Age</td> <td></td> <td></td> <td></td> <td>Home Phone</td> </tr> <tr> <td>10/13/75</td> <td>47</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Passport Number</td> <td>Issue Date</td> <td>Expiration Date</td> <td></td> <td></td> <td>Work Phone</td> </tr> <tr> <td>34567456JJK555SDFG</td> <td>12/13/19</td> <td>12/13/23</td> <td></td> <td></td> <td>888-829-7944</td> </tr> <tr> <td>Place Issued</td> <td>Citizenship</td> <td></td> <td>Current Meds</td> <td></td> <td></td> </tr> <tr> <td>Cleveland OH</td> <td>US</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Occupation</td> <td></td> <td></td> <td>Allergies</td> <td></td> <td></td> </tr> <tr> <td>Attorney</td> <td></td> <td></td> <td>Cats</td> <td></td> <td></td> </tr> <tr> <td>Dietary Preferences</td> <td></td> <td></td> <td>Release Date</td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Emergency Contact</td> <td>Emergency Phone</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Marcie Vargo</td> <td>330-658-9785</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Physician Name</td> <td>Physician Phone</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Dr Jones</td> <td>330-653-2211</td> <td></td> <td></td> <td></td> <td></td> </tr> </table>					Height	Weight	Gender	T-Shirt Size	Medical Conditions	Mobile Phone	6' 2"	165	M	XL		(330) 556-9874	Birthdate	Age				Home Phone	10/13/75	47					Passport Number	Issue Date	Expiration Date			Work Phone	34567456JJK555SDFG	12/13/19	12/13/23			888-829-7944	Place Issued	Citizenship		Current Meds			Cleveland OH	US					Occupation			Allergies			Attorney			Cats			Dietary Preferences			Release Date									Emergency Contact	Emergency Phone					Marcie Vargo	330-658-9785					Physician Name	Physician Phone					Dr Jones	330-653-2211				
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Main Tab

Main	Notes	Prices / Options	Payments / Refunds	Fundraising	Contact Details	Group / Agency	Flights / Buses	Email Log	Tasks / Docs	Reports / Invoices																														
PACKAGES <table border="1"> <thead> <tr> <th>Description</th> <th>Insurance</th> <th># PAX</th> <th>Sub Total</th> </tr> </thead> <tbody> <tr> <td>Mike Alexander 10-Day Holy Land Tour 5-1</td> <td>Yes</td> <td>1</td> <td>\$0.00</td> </tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>						Description	Insurance	# PAX	Sub Total	Mike Alexander 10-Day Holy Land Tour 5-1	Yes	1	\$0.00																					CLIENT DETAILS Mike Alexander 123 street Source Segment GL/AGENT DETAILS Mike Alexander 123 street		BOOKING TOTALS Total Packages: <u>\$0.00</u> Total Options: <u> </u> Penalties: <u> </u> Air Fare Sub Total: <u>\$0.00</u> Insurance Total: <u> </u> Total: <u>\$775.00</u> Less Payments Made: <u>\$1,381.50</u> Less Discounts: <u>\$0.00</u> Balance Due: <u>-\$606.50</u> Date Due: <u>Sep 21, 2023</u>				
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OPTIONAL EXPENSES <table border="1"> <thead> <tr> <th>Description of Misc Services</th> <th>Cost</th> <th>PAX</th> <th>SubTotal</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table> <p style="text-align: right;">Tour Options Total: <u> </u></p>						Description of Misc Services	Cost	PAX	SubTotal																	DEPARTURE LIST NOTES <div style="border: 1px solid black; height: 100px; width: 100%;"></div>														
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PAYMENTS <table border="1"> <thead> <tr> <th>Payment Date</th> <th>Amount Paid</th> <th>Type of Payment</th> </tr> </thead> <tbody> <tr> <td>Nov 8, 2022</td> <td>\$10.00</td> <td>Credit Card</td> </tr> <tr> <td>Nov 8, 2022</td> <td>\$10.00</td> <td>Credit Card</td> </tr> <tr> <td>Nov 8, 2022</td> <td>\$9.99</td> <td>Credit Card</td> </tr> </tbody> </table> <p style="text-align: right;">Received To Date: <u>\$1,381.50</u></p> <table border="0" style="width: 100%;"> <tr> <td><u>Cash or Check</u></td> <td><u>Credit Card</u></td> <td><u>CC Passthru</u></td> </tr> <tr> <td>\$198.00</td> <td>\$1,183.50</td> <td>\$0.00</td> </tr> <tr> <td><u>Discounts</u></td> <td><u>Transfers</u></td> <td><u>Premium Received</u></td> </tr> <tr> <td>\$0.00</td> <td>\$0.00</td> <td> </td> </tr> </table>						Payment Date	Amount Paid	Type of Payment	Nov 8, 2022	\$10.00	Credit Card	Nov 8, 2022	\$10.00	Credit Card	Nov 8, 2022	\$9.99	Credit Card	<u>Cash or Check</u>	<u>Credit Card</u>	<u>CC Passthru</u>	\$198.00	\$1,183.50	\$0.00	<u>Discounts</u>	<u>Transfers</u>	<u>Premium Received</u>	\$0.00	\$0.00		AUTOMATED EMAIL BLOCKING BLOCKING OPTIONS <i>If either is checked, email will not send</i> <table border="0" style="width: 100%;"> <tr> <td>Block Emails?</td> <td>TM Block?</td> </tr> <tr> <td>Payment Reminder <input type="checkbox"/> Yes</td> <td><input type="checkbox"/> Yes</td> </tr> <tr> <td>Late Payment Notice <input type="checkbox"/> Yes</td> <td><input type="checkbox"/> Yes</td> </tr> </table>					Block Emails?	TM Block?	Payment Reminder <input type="checkbox"/> Yes	<input type="checkbox"/> Yes	Late Payment Notice <input type="checkbox"/> Yes	<input type="checkbox"/> Yes
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Late Payment Notice <input type="checkbox"/> Yes	<input type="checkbox"/> Yes																																							

All of the information on the main tab is for display only – it summarizes the critical details of the booking on the front tab.

Notes Tab

On this tab you can enter general notes about the booking on the left; the system will stamp each entry with the date and user name. To the right, areas are provided for specific details to be added to documents generated from within TourTools.

Prices / Options Tab

This screen shows the Packages and Options available (at the bottom) and sold (at the top).

PRICES & REQUIREMENTS

(by default, all passengers are included in each package)

Packages	Description	Occ Type	Status	#PAX	Ins	Price	Pkg Type
Options Booked	Adj Pax Las Vegas	Double	CNF	2	x	\$949.00	PKG
<div>Display</div> <div> <input checked="" type="radio"/> PKG <div>\$1898.00 TOTAL COST</div> </div>							
Description	Avail?	Sng	Sts	DTQ	Type	Price	Pkg #
Las Vegas		49	0		Single	\$1,249.00	3330
Las Vegas		49		24	Double	\$949.00	3330
Las Vegas		49		24	Triple	\$929.00	3330

You can add to or take away from the booked packages and options here. If the travelers in this record, by example, change their mind about wanting the optional Juliette Low Birthplace visit, you would click on the “Delete” button associated with the Package.

↶	Roger	Secretist	+	-	Tag#		01/07/1945	M	77
↶	Betty	Secretist	+	-	Tag#		04/09/1958	F	64

Main	Notes	Prices / Options	Payments / Refunds	Fundraising	Contact Details	Group / Agency
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PRICES & REQUIREMENTS

(by default, all passengers are included in each package)

Packages	Description	Occ Type	Status
Options	Adj Pax Las Vegas	Double	CNF

Use the “plus” and “minus” signs behind the traveler’s names in situations where not everyone in the record is doing the same thing. In this example, if we queue up the “Optional Juliette Low Birthplace Visit” by clicking on the “Adj Pax” button preceding the Package name, Lynne and Sadie’s names are highlighted above in green to reflect that they are both confirmed. If the minus sign following Lynne’s name were to be clicked at this point, she would no longer be confirmed for that Package and the #Pax confirmed would change to 1.

It is possible to tie two travelers from *separate* records who are going to room together on an optional post-tour Package together by typing a common “Tag#” in the field so named. Note that this is a *different* tag than the one associated with the base package confirmed in both of their Bookings.

Example

Wilma Flintstone and Betty Rubble are traveling with their husbands on a tour that offers an optional post-trip extension. The Flintstone booking is assigned tag #1, and the Rubble, #2. In the Flintstone record, Wilma is shown to be the one Pax confirmed for the post-tour by virtue of the green highlighting; and in the Rubble record, Betty is similarly shown to be confirmed. In the field labeled “Tag#” that follows their names, typing a 10, by example, will assign them that position on the roomlist that will eventually be run for the hotel featured in the post-trip extension.

Additional Options: This is where you can sell miscellaneous services that you opted not to build into Packages. Describe the charge, enter a number in the “#Pax or #Units” field, and load the related price in the appropriate field or fields (if you want to make a profit on the option being sold here, enter a gross and a net amount). Note that, in spite of the fact that these charges are described as “options” the costs load to the Packages portal and so are added to the Packages total on the Payments tab and also on the invoice.

Payments / Refunds Tab

Payments		Refunds																																											
PAYMENT OVERVIEW <div> Responsible for Payment <input type="text"/> </div> <div> Cash or Check Credit Card Fund Raising \$300.00 \$0.00 Refunds Discounts Transfers CC Pass \$0.00 \$0.00 \$0.00 </div> <div> Block Pmt Remind? Block Late Pmt Remind? Yes Yes </div>		<div> Load TM Deposits Next Payment Next Amt Due Next Due Date Final Payment \$950.00 06/04/23 Final Amount Due Final Due Date Final Due? \$950.00 06/04/23 Yes </div> <table border="1"> <thead> <tr> <th>Amount</th> <th>Due Date</th> <th>Due?</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td></tr> </tbody> </table>		Amount	Due Date	Due?																																							
Amount	Due Date	Due?																																											
PAYMENT INFORMATION <div> Insurance Accept All Decline All Insurance Premium Next Pay + Premium <input type="text"/> <input type="text"/> </div> <div> New Payment/Discount New CC or Scheduled Payment New eCheck/ACH Payment </div> <table border="1"> <thead> <tr> <th>Type of Payment</th> <th>Payment Date</th> <th>Amount Paid</th> <th>Check #</th> <th>Transaction Notes</th> <th>Received By</th> </tr> </thead> <tbody> <tr> <td>Check</td> <td>9/7/2022</td> <td>\$300.00</td> <td>1234</td> <td> </td> <td>LS</td> </tr> </tbody> </table> <div> Card # Exp MM/YY FR: <input type="checkbox"/> <input type="button" value="Cancel"/> </div>		Type of Payment	Payment Date	Amount Paid	Check #	Transaction Notes	Received By	Check	9/7/2022	\$300.00	1234		LS	PASSENGER INVOICE <table border="1"> <tbody> <tr><td>Packages</td><td>\$1,250.00</td></tr> <tr><td>Options</td><td> </td></tr> <tr><td>Penalties</td><td> </td></tr> <tr><td>Airfare</td><td>\$0.00</td></tr> <tr><td>Donation</td><td>\$0.00</td></tr> <tr><td>Total Insurance</td><td> </td></tr> <tr><td>Insur Retained</td><td> </td></tr> <tr><td>Total</td><td>\$1,250.00</td></tr> <tr><td>Discounts</td><td>\$0.00</td></tr> <tr><td>Adjusted Total</td><td>\$1,250.00</td></tr> <tr><td>Payments</td><td>\$300.00</td></tr> <tr><td>Refunds</td><td> </td></tr> <tr><td>Balance Due</td><td>\$950.00</td></tr> <tr><td>Date Due</td><td>Jun 4, 2023</td></tr> <tr><td>Refund Due</td><td>\$0.00</td></tr> </tbody> </table>		Packages	\$1,250.00	Options		Penalties		Airfare	\$0.00	Donation	\$0.00	Total Insurance		Insur Retained		Total	\$1,250.00	Discounts	\$0.00	Adjusted Total	\$1,250.00	Payments	\$300.00	Refunds		Balance Due	\$950.00	Date Due	Jun 4, 2023	Refund Due	\$0.00
Type of Payment	Payment Date	Amount Paid	Check #	Transaction Notes	Received By																																								
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This is where payments received after the Booking record was initially created will be posted. In the center of the screen is a display of the payment requirements as established in the Tours record, along with a running account of what is currently due. Clicking on the “Load Tours Deposits” will update the record with details from Tours, which detail can be overwritten as necessary if you make special payment arrangements with the traveler(s).

The “Passenger Invoice” pane running along the right side of the record will display in more detail a breakdown of charges—including any charges posted in the Direct Entry Option (sub) tab on the Prices tab and any air charges from the Flight Info tab—as well as any payments, commissions and such. This display is different when looking at a GL/GL record.

“Credit Card Passthru” is one of the values that can be assigned to a payment and will be selected in instances where you pass your traveler’s credit card information on to another vendor—such as an airline or cruise line—in payment and *they*, rather than *you*, do the actual processing. **Note: Don’t forget to make corresponding entries for payments processed in this manner to the Vendor account payable in Ops.**

If you have situations where you need to transfer money from one Booking to another; use the “Transfer” payment identifier. In the booking record that you want to take the money *from*, enter a negative figure in the “Amount” field and reference the record to which you are transferring the money—perhaps by last name and booking number—in the “Transaction Notes” field. In the record you are transferring money *to*, you will also indicate “Transfer” as the type of payment but will enter a positive figure. In the notes field, again reference the name and booking number from where the payment originated.

In the area to the left, note the two buttons “Block Pay Remind?” and “Block Late Remind”. By default those are set to “No”, but can be set to “Yes” if the traveler is to be notified via email of delinquency or a payment deadline coming up (part of the TourTools Online interface you may have purchased).

A couple of things to mention regarding payments. You’ll notice an “up arrow” precedes each payment in the portal (this is the same in Ops). As always, that is an invitation to “click for details”, and the “Payment Entry” that presents contains all of that detail. Modifying or deleting a pay record should be done only in extreme cases, usually at the discretion of the owner, as this goes against all accepted accounting procedures.

If you have a returned check, do not delete it as doing so means you lose the payment history. Rather, make an adjusting entry by posting a new payment with a negative amount equal to the value of the bounced check, and in the transaction notes field reference the fact that “this replaced returned check #xxx”.

If a refund is payable due to an overpayment or due to cancellation of a reservation, come to the 2nd tab to see the detail and to close the account. In the case of a canceled reservation (details on the process are explained later in this chapter), the display might look something like what you see here.

Payments				Refunds	
<u>Total Cost</u>	<u>Balance Due</u>	<u>Refund Due</u>	<u>Cancellation Penalty Date</u>	<u>Cancellation Penalty</u>	<u>Cancellation Penalty Description</u>
\$1,250.00	\$950.00	\$0.00			

When a reservation is canceled, be sure to check if any Pass-thru payments were credited to the record and make reversing entries for them. **DO NOT REFUND THEM AS THEY REPRESENT MONEY YOU NEVER RECEIVED.** Rather, make a reversing entry in the corresponding Ops record, and create a To Do reminder to monitor that the Vendor refunds your client's passthru payment (if appropriate) to them directly.

VIEW PAYMENTS & ENTER REFUNDS

Type	Date	Amount	Ins Prem Portion	Card	Card Number	ExpDate
Check	Sep 7, 2022	\$300.00				

Maximum Refundable: \$300.00

Method of Payment	Date	Amount Refund	Check #	Write	Transaction Notes	Inc Adj Label	Issued By

Received To Date: \$300.00

Cash or Check	Credit Card	Premium Rec'd	Refunds
\$300.00	\$0.00		
Discounts	Transfers	CC Pass	
\$0.00	\$0.00	\$0.00	

Premium Received	Insurance Notes
Retained Insurance Premium	<p style="font-size: x-small; margin: 0;">When a reservation is cancelled, a penalty will be calculated for you, based on the input made in TM. The amount and the reason for the penalty will drop into the fields at left and will display on the Refund letter. You can override the penalty amount by typing a new figure in the Cancellation Penalty field.</p>

In the View Payments portal, you can see what's been received (\$400); and in the area labeled Tour & Refund & Penalty Information section, the penalty as set in the Tours record (\$200) displays in the **Cancellation Penalty** field. The resulting refund is referenced in the field labeled **Refund Due**.

Clicking on the "Enter Refund Check" button will load the refund payable and at that point the "Refund Due" will zero out. Posting the refund in the lower section of the screen is exactly like posting a payment.

If the refund is to be made via credit card, click on the button labeled "Load CC Records" (directly to the left of the "View Payments – Enter Refunds" label) then on the "New Credit Card" button and then enter pertinent card details as is done when posting income. The payment type will be identified as "Refund" and the "CC Trans Type" will be "Credit".

Note: It is possible to override the penalty that calculates automatically from Tours. In this case, if you decided to penalize the travelers just \$100, you would overtype the \$200 "Cancellation Penalty" and the "Refund Due" would adjust to \$300.

The "Refund Letter" that can be generated from the Doc Queue tab of the Reports menu will display all of these figures on a document that can be mailed, along with your check, to the passenger.

Refunds due to overpayment are handled in exactly the same manner. All refunds pending in your system

can be viewed on the “Refunds Due List”, another report that can be accessed from the Reports menu.

Fundraising Tab

This tab is where fundraising contributions are entered and managed. For more details on this feature, see the [Fundraising Feature](#) section that follows.

Contact Details Tab

This tab is informational only and displays the related Client contact information/

Group/Agency Tab

The process of making a GL booking is explained in detail later in the chapter.

Group/Business/School Information: If the Booking was made via a GL record, the Group Leader’s Client number will be referenced in the **GL Rec # Cli** field. The field **GL Rec # Tours** references the link between the Booking and the Master record that may be associated with the Tours record. Clicking on the button labeled “Find Group” will assemble all of the Booking records related to the same GL for the same tour and will also reference how many there are in total.

Tour Options / Comps / Cruise Gift Packages. Use this area to load the cost for gifts that are purchased by a second party for the traveler(s). By example, the children of some cruise participants want to surprise their parents with a fruit basket in their cabin. You can load the description and the cost detail and log the date you received payment. None of this information affects the balance due, does not appear on any invoice or confirmation, and does not impact your P/L.

Commissions. This area is where commissions are posted and managed for the GL booking. More details on this section will be added soon.

Flights/Buses Tab

On the Flight Info screen, there are three tabs. If you have flights loaded in the Tours record, clicking on the one labeled “All Flights by Tour” will display those for selection.

Booked Flights			All Flights By Airport Code and Tour				All Flights By Tour			
Date	Date Offset	Seg Description	Carrier	Flight #	Carrier Name	Class	PNR	Itinerary	Type Booking	
Oct 28, 2022		ORD-CLE AA #1234	AA	1234	American Airlines	ECON	1234	Red	<input type="button" value="Book"/>	
Departure	9:00 AM	ORD Chicago	Arrivals	Oct 28, 2022	10:00 AM	CLE	Cleveland	<input type="button" value="Edit"/>		

You can otherwise build a flight itinerary for an individual traveler or for the group right here in Bookings; the process is exactly the same as explained in Chapter 4, and in fact the new itinerary will be saved to the Tours record.

To press a point as concerns the “Fare” field, this amount should be loaded in one segment related to the itinerary to reflect the associated cost. **Be aware that this fare will add to the balance due being calculated in the Booking and thus contributes to the overall “Tour Gross” amount as reflected in the P/L for the tour. What is not accounted for here, however, is what you paid the airline. As such, unless you account for that by means of a Contracted Services record linked to and sold as part of a Package, or make a miscellaneous adjustment in Ops, your profit will be overstated .**

When it comes time to assign a flight schedule to a specific Booking or to a found set of records, click on the “All Flights by Tour” and make the selection appropriate for your traveler(s) by clicking on the “Book” button. The script will ask if you want to book by “Segment”, sort of a la carte; or, use the “Itinerary” color, which would load the *complete itinerary* from start to finish. You will also be asked if you want to load to just the record you are in, or if you want to load to your expanded “found set”. Whatever your selection, the flight itineraries will load to the Booked Flights tab.

If you have a schedule change or change in the cost for the air transportation, go to the All Flights by Tour tab in Bookings or in Tours, and click on the “Edit” button in the segment you want to alter. Make whatever change is appropriate in the window that displays and click “Save” to complete the update in the record and in the records of all passengers holding the segment in question.

If you have a schedule that is *similar* to one that is already in the flight library, you can click on the “Edit” button and in the window that opens use the “Duplicate” button at the top of the screen to make a copy of the itinerary. Then, open the new record—again using the “Edit” button—and make whatever changes are necessary before saving it.

The Reports Menu section at the end of this chapter details the air manifests that are available from here in the Bookings module. Be aware that clicking on the “DEP” and “ARR” buttons on the “Booked Flights” tab in any individual Booking will allow a “quick call” of a manifest for tour participants on just the segment represented.

Booked Flights

All Flights By Airport Code and Tour

All Flights By Tour

Extra Arrangements

Date	Date Offset	Seg Description	Carrier	Flight #	Carrier Name	Flt Group	PNR	Itin Color	Fare Net
Fri 24 May 19		BUR-SEA AS #1021		1021	Alaska Airlines	ECON	ZRJ1IW	Gold	
<div>DEP</div> <div>7:00 AM</div>	BUR	Burbank	<div>ARR</div> <div>Fri 24 May 19</div> <div>9:40 AM</div>	SEA	Sea-Tac				<div></div> <div>OK</div>
Sun 26 May 19		SEA-BUR AS #1054		AS 1054	Alaska Airlines	ECON	ZRJ1IW	Gold	
<div>DEP</div> <div>7:30 PM</div>	SEA	Sea-Tac	<div>ARR</div> <div>Sun 26 May 19</div> <div>9:59 PM</div>	BUR	Burbank				<div></div> <div>OK</div>

Email Log Tab

This tab contains a log of emails sent to Passengers out of TourTools. Hover over the various sections to see additional details. If an attachment was included (and if it was selected to be saved to the Booking record at the time it was sent) you will find that attachment in the Document Library on the **Tasks / Docs** tab.

Task / Docs Tab

On either tab, click on the “+” button to create a new task or add a new document to the library. As in all modules, the tasks will come find you on your dashboard when the due date approaches.

Reports / Invoices Tab

This tab will show you all of the available Booking reports. To learn more about each one of these reports, visit the [Booking Reports & Docs topic](#).

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.


Last modified: December 25, 2022

Adding a New Booking

This section of the User Guide is still undergoing updates. Thanks for your patience!



Making a Booking

The booking process usually begins in the Client database, where your first order of business is to find (or create) the Client record to which the booking is to be linked. As appropriate and if you haven't already done so, address the question of whether the reservation will be for a group leader or re-seller, in which case it should be marked as a Master; whether (at what percentage) the reservation should be commissioned (Address tab) and whether a salesperson is to be credited with the booking (Main tab). So long as the Client record is "Active", you are good to proceed.

 Booking

To start, in the Client record you wish to add a Booking, click on the "+ Booking" button. You will be asked to reconfirm that you want to make a tour booking. If you began the process in error, you are able to abort by clicking on the "Stop" button. If your Client has been linked to one or more Master Records (explained in the Chapter 2), you will next be asked if you want to link this booking to one of them. If you reply "Yes", the linkage is made when you click on the "Select" button adjacent to the Master name in the portal that will present. If the booking is for an individual you do not wish to associate or link to a group leader or travel agent, your response is "No".

New Booking Screen 1

 Stop
Continue 

1) SELECT A TOUR...

Tour Code

Reservation #38615

TOUR INFORMATION

Tour Name

Tour Begins Tour Ends

Tour Notes

ROOMS	Single	Double	Triple	Quad	SEATS
Blocked					
Sold					

CLIENT DETAILS

Client's First Name Client's Last Name

Fred Flintstone

Business/School/Group Name

Last Year Traveled

2023

2) SET BOOKING DETAILS...

Travelers

Type of Room

Type of Booking

Type of Invoice

Division

3) SET MARKETING DATA...

How did the client become a client?

Source of Booking

Segment

In the first screen that presents, you will see and be able to select from codes **for all tours still to depart and marked active**. Otherwise, if you know the code, beginning to type it will narrow the search.

Once having picked a code, glance to the bottom of the screen where the tour name, begin and end dates will have dropped into view. You will also see a display of the tour's present status—number booked, available, etc. and, just below, the name of the Client or Contact to which this booking is linked.

Using the value lists that present, complete the **# Travelers**, the **Type of Room** (if it's a day trip with no room component, choose "Day"), the **Type of Booking** and the **Type of Invoice** fields. When creating a "direct" booking, i.e. not associated with a group leader, travel agent, etc., your input will be "PAX" and "PAX."

In the **Source** and **Segment** fields, select from the values that presents to identify how the booking came to be. The values you see are the same you were able to select from in Client. In the **Salesperson** field, you will see the name of the person who has been associated with the Client to which this Booking is linked. As appropriate, eliminate or change that reference now.

If you've made an incorrect selection, simply select again. If you need to thwart the booking process because you've started from the wrong Client, or for any other reason, click on the "Stop" button.

Click on the "Continue" button to move to the next window.

New Booking (Screen 2)

New Booking (Screen 2)

Stop

Continue

TOUR INFORMATION

TOUR Name	ROOMS	Single	Double	Triple	Quad	SEATS
DC Performance Tour	Blocked	5	25	1		52
	Sold	1	1.5	0		5

Tour Code	Tour Begins	Tour Ends
DCPERF10282023	Sat, Oct 28, 2023	Fri, Nov 3, 2023

CLIENT DETAILS

ID#150494

Client's First Name Client's Last Name

Fred Flintstone

Business/School/Group Name

Group Name

Last Year Traveled

GL Record #

Reservation #38616

Type of Booking

Type of Invoice

PAX

Division

4) SPECIFY PASSENGER/ROOMING DETAILS...

Tour Code

Travelers

Type of Room

Tag #

6) SPECIFY PICKUP/DROPOFF LOCATIONS...

Preferred Meeting Point

Air Departure City

Air Return City

SELECTIONS Load outbound and return selections from availability below

Depart #	Outbound Meeting Point	Date Outbound	Time	Bus Code
Return #	Return Meeting Point	Date Return	Time	Bus Code

5) VIEW PRICING, SELECT PACKAGES...

Select: ☐ DRVR ☒ PKG ☐ STF_DBL ☐ STF_SNG

Division

Packages & Options AVAILABLE

Description	Availability?			Type	Price	
	Seats	Single	DTQ			
Core Package	5			Single	\$956.00	<input type="button" value="Book"/>
Core Package		20		Double	\$769.00	<input type="button" value="Book"/>
Core Package		20		Triple	\$706.00	<input type="button" value="Book"/>
Core Package		20		Quad	\$675.00	<input type="button" value="Book"/>

AVAILABLE MEETING (OUTBOUND) LOCATIONS AND TIMES

Outbound Meeting	Date	Time	Bus

AVAILABLE MEETING (RETURN) LOCATIONS AND TIMES

Return Drop Off	Date	Time	Bus

Next, click on the “New PAX from Client” button to download the name or names resident in the Client record. If there are two names in the Client record, *both* names will load at the click of the button. If both persons represented in the Client record are not traveling, it’s better to use the same process as you would if the name of the traveler is *not* the name represented in the Client record (example being a situation where “mom and dad” are represented in the Client record, but it’s their child who is the traveler). That would be to click on the “New Pax Record” button as many times as necessary to load all of the travelers (maximum of four) that will occupy the room represented in the booking.

If for any reason you want to manually waitlist the reservation, click the box highlighted in our example in yellow.

If the reservation is for a single person open to sharing a room, click in the “Wants a Roommate” field.

If the traveler *has* a roommate, confirmed in a separate Booking, the roommate's name can be entered in the "Rooming With" field (see green highlights) and you can now, or eventually, mark both records with a common Tag #, explained as follows:

Each time you make a booking, TourTools™ will automatically assign the next available Tag#, shown in our example as #2 in the field labeled “Next Tag #.” In some sense, tag numbers can be thought of as room numbers and are what allow you to tie reservations from *separate records* together on the rooming list. You are able to manually assign or override a tag number (in the field highlighted in red), either now or at a later time, to travelers who have separate booking records but plan to share the same room.

Example

Harriet Smith and Betty Jones have two separate client records and are rooming together on tour. Harriet’s reservation was processed first and was automatically assigned tag number 5. Two weeks later, you receive Betty’s reservation. If you note Harriet’s number before processing Betty’s reservation, you can immediately enter “5” in the tag number field as you book Betty; or, once Betty’s reservation is complete, you can go back and override the number that was automatically assigned. The shared tag number is what will join them on the rooming list you will eventually generate.

A few suggestions: The rooming list’s primary sort is on the Tag # so it is recommended that you assign a high number to the driver and tour escort; that way, they will drop to the very bottom of the document. It may also be helpful to assign sequential tag numbers to all of your double/twin rooms, then follow with your triples, then quads, then singles. It makes your roomlist a little more logical and visually appealing. Finally, it also makes sense to assign sequential tag numbers to people traveling together, who have requested adjacent rooms.

If the reservation is for a Driver or someone (an escort or group leader) you consider to be Staff (traveling on a Single or Double occupancy basis), click in the appropriate field (in our example, highlighted in blue) to load the number of passengers in the record to be tagged as such. **Note that the numbers entered in these fields are what will populate the “Utilized” fields of the same names in Tours.**



The only Packages that you will see here are those that have been Published. Anything not published will not display and so cannot be sold.









Next, proceed to the “View Pricing, Select Packages...” part of the screen, in the lower left, where you will see a series of labeled buttons representing the various Package types associated with the tour. Picking any one of them will trigger display of Packages of that type that are available for purchase. It’s recommended that you click “PKG” first and sell the “Primary” or core Package before selling any Options.

5) VIEW PRICING, SELECT PACKAGES...

Select: ☐ DRVR ☒ PKG ☐ STF_DBL ☐ STF_SNG

Division

Packages & Options AVAILABLE

Description	Availability?			Type	Price	
	Seats	Single	DTQ			
 Core Package		5		Single	\$956.00	
 Core Package			20	Double	\$769.00	
 Core Package			20	Triple	\$706.00	
 Core Package			20	Quad	\$675.00	

Referring to the example on the previous page, since the booking is for one person in a single, the “Discover Savannah” package on a “Single” basis would be selected by clicking on the “Book” button on the right. Once a selection has been made, the Package details will load below, along with an indication of how many passengers booked the service, and the status. In our example, since the “#Travelers” in the record was 1 when Discover Savannah was booked, a 1 would drop into the “#Pax” field. If the sale is confirmed the Status will show as “CNF”, the Price field will reflect the per person cost of \$512, and PKG shows as the Type. If there is no space available on the tour, either because the capacity reflected in Tours has been exceeded or because inventory in one of the Package’s Contracted Services records has been depleted, the Status will display as WL (waitlisted). Note that any and all waitlisted records remain so until you clear them; i.e. the process is not automated meaning you might chose to confirm the second or third record ahead of the first if circumstances dictate.

As mentioned earlier, if there are other package types associated with the tour, additional buttons (labeled OPT, LAND ONLY, etc.) will display. Click on them one by one and examine each list to make all the appropriate selections for your Booking. If you are not certain which Package is the one you want, clicking on the small “i” icon next to the Book button, will take you to the Packages module, where you can view the itinerary to see what is included, before returning to the Booking.

The last thing to reference on this layout relates to the traveler’s departure preferences, as they relate to motorcoach or air travel. If noted in their Client record, those preferences will be visible here. If a schedule of motorcoach pick-up and drop-off points has been loaded in Tours, that detail will also be visible and available to select from.

To proceed to the next step in the booking script, again click on the “Continue” button at the top of the screen.

You are now at the point where a payment can be posted. Click on the “New Payment or Discount Record” button to post anything but automated credit card payments (possible if TourTools™ is interfaced to an internet-based credit card processing software; process explained below).

The **Type of Payment** is a value list of choices (Cash, Check, Credit Card, etc.), the check number goes in the field so labeled, the initials or name of the person posting the payment should be entered in the **Received By** field, today's date will auto-fill in the **Payment Date** field, free-form notes can be entered in the **Transactions Notes** field, and the amount of the payment should be entered in the **Amount Paid** field. If your system is programmed to accommodate the sale of travel insurance, there is a field reflecting the premium due as well as a field where the amount of the premium paid can be input. Note that the only time you will use the Credit Card identifier as part of this process will be in instances where you ran the card outside of TourTools™ and need simply to add the payment to the record after the fact.

If you want TourTools™ to calculate a discount based on a percentage of the total cost, select "Discount" as the Payment Type and input the percentage as a decimal (example .10) in the **Discount %** field and click on the "Calc Discount" button. At that point the calculated amount will drop into the **Amount Paid** field.

When all entries are complete, use the "Post" button.

Credit Card Payments and Voids

New Payment/Discount	New CC or Scheduled Payment	New eCheck/ACH Payment
----------------------	-----------------------------	------------------------

To process a credit card payment online, click on the "New CC or Scheduled Payment" button.

Doing so will begin to set up a payment record and will "auto-load" several fields; today's date, and the Client name.

As appropriate, click on the "Bal" button to load the current balance, and pick from the value list to identify the **Payment Type**. Do the same in the **CC Transaction Type** (Sale, Credit or Void) field, and continue by entering the card detail. If you have the security code, load it in the field labeled **ID**. This number is not vital to the process unless required by your credit card vendor.

When all entries are complete, click on the "Submit" button. Upon receipt of an authorization response, you will be prompted to post the payment to the account.

If you need to void a payment, click on the "Void" button that appears beneath the entry on the "Payments" screen. That will queue up the details of the card, the amount, the authorization code related to the payment, etc. related to the payment that needs to be reversed. Follow the prompts to continue. **Note: A payment can only be voided on the same day it was initially processed.**

The reservation process ends at the Notes screen. Notes entered in the **Depart** or **Ret Manifest** fields will appear on the manifests that reflect who is joining and leaving the tour at points specified in the Tours record and picked in the Booking (further details follow). **Airline Notes** will appear on the various flight manifests; **Invoice Notes** will appear on the Invoice or Receipt, and **Rooming List Notes** are self-evident. To make internal notes about the Booking, type in the unlabeled white field and click on the pencil to load. The remarks will be tagged with the current date as well as your name.

The “required steps” in the booking process have been completed. You may now need/want to click to some of the other tabs in the record to make additional entries.

Completed Booking Screen

Most of the fields/buttons on the top of this layout do not require explanation or have been addressed previously. Those that haven’t include:

Tag Color: In cases where you have a multi-bus move and want to assign travelers to one bus or the other, use the color coding available via the value list attached to this field (this is different than the colors you are able to assign to bus pick-up and drop-off locations in Tours).

Go Pax Records: For every name in the Booking record, there will be a corresponding “Pax” record, accessible by clicking on this button. You’ll recognize the fields in the section labeled “Personal/Dietary Information” as referencing data from Client (Passport Number, Birthdate, Medical Conditions, etc.). If these fields were empty at the time the booking was made, go back to the Client record to load the details, then return to the Pax record and click on the “Update Health/Diet Info from Client”. You can otherwise update or edit the information right here; however, your input does not translate back to Client.

Name Tag Public	Name Tag Group	Name Only Tag	Luggage Public	Luggage Group	Document Label
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Along the top of the screen you will see a bank of buttons that can be used to generate a variety of name and also luggage tags, as well as a label that can be used to tag document packets.

Use the “< Back” button to return to the front page of the Booking.

Meals



Clicking on the small spoon and fork icon has the same effect as clicking on the “Go Pax Records”. If meal selections have been loaded in Tours, notice that the icon will turn red or pink.

MEAL SELECTIONS

Load Meals

Description Menu

Clear All Meals

Once in the Pax record(s), click on the button labeled “Load Menus”, to bring the restaurant(s) confirmed as part of the trip into view. Clicking in the field adjacent to the restaurant name will present the menu choices available to pick from and clicking on one will assign that meal to the passenger whose record you have open. Use the navigational arrows at the top left of the layout to move to the next Pax in the record to assign their meal selections. Choices made here correspond to the Pax Meal Report that can be run from Bookings.

At the bottom of the Pax screen there are fields referencing Fundraising and Insurance, both of which are not generic to the system. If either might be something you can use, please ask for details.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Adding a New Group Leader Booking

This section of the User Guide is still undergoing updates. Thanks for your patience!

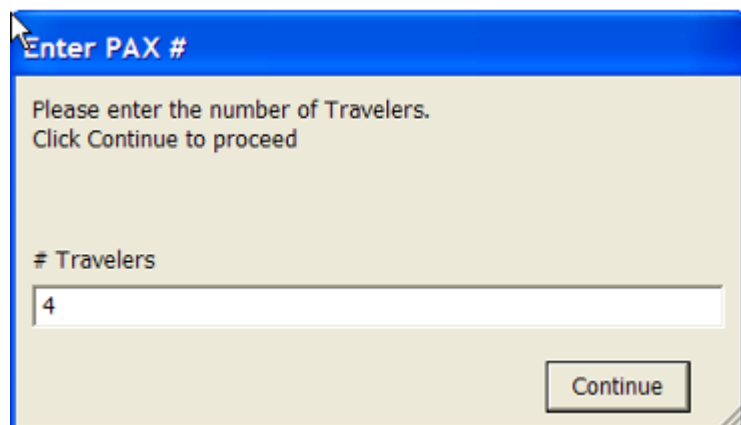
Making a Group Leader Booking

So far, what we've covered is the process for making a reservation for individuals who are booking direct and paying their own expenses. In situations where you have a sponsoring organization or another reseller acting as an intermediary, you will set up what is referred to as a Group Leader booking record. GL records can be used in situations where you never actually receive the names of the travelers— perhaps for a day trip—and it will suffice to simply invoice for “x” number of travelers; or, for instances where you receive nothing more than the names of the travelers, for whom there's no need to create an individual Client record, and a summary invoice is desired.

The process of creating the Group Leader record begins exactly the same as for an individual, i.e., start in the Client record— **which must be identified as a Master** —and click on the “+ Booking” button.

Once in the new Booking record, select the tour code and skip over the “#Travelers” and “Type of Room” fields. Select “GL” as the “Type of Booking” and “Type of Invoice” and then “Continue”.

On the next screen, **no pax name is entered in the record**. This type of Booking can be thought of as a “holding account” or a “shell record”.



If you want to put a hold on space and be able to create a preliminary “pro-forma” invoice and/or if you anticipate never actually receiving or loading *individual* names, click on the “Book” button that follows the Package description, just as you do when making an individual booking. What you will then see is a screen that looks like this, prompting you to enter the number of persons who are expected to travel on that basis. In this example, we clicked on “Double” as the package type and are projecting that 4 persons will travel on a double occupancy basis. After entering the number, click “Continue”.

This process can be repeated for as many packages as you have available and wish to sell and set up for invoicing. By example, if on this tour we needed to also invoice for 9 persons in a triple and 12 in a quad, we would repeat the process of selling twice more. When you finish, the Prices tab will reflect the sale of 4

Doubles, 9Triples, etc., and the “Group Leader Invoice”, that can be run from the Reports menu, will detail these charges.

If, as promotion of the trip moves along, there are changes in the numbers of passengers expected to travel, you can return to the Prices screen and click on the number currently confirmed for a given Package. The same window as shown earlier will open, and you can simply overtype the numbers.

If the record created in the early stages was to hold seats and allow creation of a pro-forma invoice, and you now have actual names of the travelers, come to the Prices screen, and delete the number of Package(s) sold. What you are doing is, in essence, releasing seats back into inventory in order that you can scoop them back up in the name of “real” travelers.

The process described next is used when you’ve been given the traveler’s names by the group leader and are ready to book them.

Begin by creating a GL/GL record as just described but move past the Prices tab without selling any Packages. Instead, complete the record, return to the Group Booking tab, and click on the “+ Make Another Booking for This Client or Group” button.

You will immediately be asked if you want to “Include” or “Separate” charges for this booking on/from the GL/GL record. Nine times out of ten, you will “include”, meaning all charges will be swept to the GL record, which is usually appropriate. The rare exception is addressed on the next page (notice the asterisk that appears toward the bottom).

The screen that you see next is a compilation of the main Entry screen and the Prices layout. Enter the **#Travelers** and **Type of Room**, then click on the “+New PAX Record” to enter the name(s) of the travelers. You’ll see that the Type of Booking has

10282018DISCSAV DISCOVER SAVANNAH			6
Tour Code	# Travelers	Type of Room	Tag#
<div> <div>+</div> <div>New PAX Record</div> </div> <div> <div></div> <div></div> <div></div> </div> <div></div>			
PAX	GL		
Type of Booking	Type of Invoice	Driver(s)	Stf Sngs
			Stf Dbls

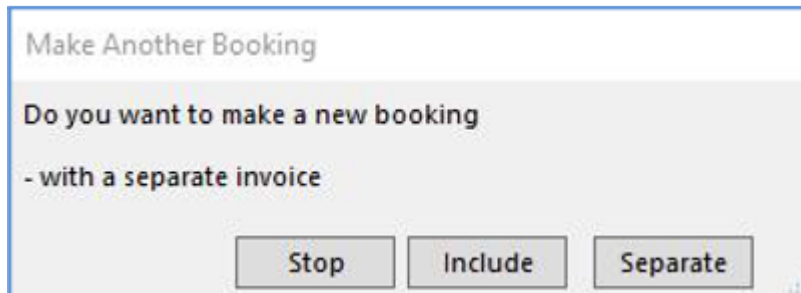
been identified as “Pax” and the Type of Invoice “GL”; values you will not change. After entering names in the record, proceed to the selling of a Package or Packages below. When you are finished, click on “Another” to continue adding passengers, or on “Done” once you have entered all of your group names.

The individual Booking records thus created will reflect Package sales on the Prices tab but appear to have no corresponding balance due. What is happening is, the *cumulative total of all charges for all (*)* bookings is being swept to the GL/GL holding record. This includes the cost of all Packages plus any “Options” sold on the Group Booking tab.

Some things to remember about Group Leader holding accounts:

- ✓ If the group leader is actually traveling, it is recommended that the *first* Booking you make from the GL holding account be theirs. Remember that the holding account—the GL/GL record— is just that; it is not a reservation record for any individual.
- ✓ Unless your group is being billed outright for a tour manager and driver, reservations for those personnel will be PAX/PAX made direct, in other words, not via the GL holding account.
- ✓ All financial transactions+—including the posting of income and the payment of refunds or commissions—+must be made in the GL holding account (*) Nothing of this nature should be posted to the individual booking records. Even if checks are received directly from a traveler to pay for an individual service—an airline ticket or some optional expense, by example—if they are booked as Pax/GL, the payment still gets posted to the GL record. In such a case, the “Transaction Notes” field would ideally reference the payee.

✓ As a reminder...If you generated a pro-forma invoice and then receive actual names from your group leader, remember to go to the Prices tab in the GL record and delete the preliminary sales you made before entering the names as actual sales. This will prevent your creating your own overbooking situation.



(*) The possibility does exist to create

something of a “hybrid” booking via a GL/GL record which explains the previous “qualifiers”.

At the point you begin the process to “Make Another Booking for This Client or Group”, you are asked if you want to Include or Separate the charges from the GL Invoice. If you have a situation where an individual traveling with the group is going to make their own payments on account, indicate that you want to separate them out. When you do, the invoice will still be addressed to their Group Leader, but the document will be completely separate from the GL Invoice.

Canceling or Rebooking an Entire Booking Record



If the entire booking is to be canceled, or if you need to rebook the traveler(s) on a different tour, click on the “Cancel” button. When you choose to “rebook”, you will select the code of the new tour and a new Booking record is created for you. You will, in either case, be asked if you want to charge a cancellation fee. If you reply in the affirmative, the fee will be calculated for you, based on the deadlines established in TM (which amount can be overridden as appropriate). When you elect to “rebook”, any payments posted in the original record will be transferred automatically (less any cancellation fees) to the new record, and notes documenting the transfer will be tagged in both.

Canceling One Passenger in a Record

To the right of each Pax name listed on the front page of a Booking record, there is a small trash can. Use that when one of the passengers represented in a multi-traveler booking needs to be canceled. When doing so, keep an eye on related data in the record; by example, has the number of travelers reduced from 2 to 1? Should the Package confirmed no longer be “Double” but need to be adjusted to “Single”? To be sure, not all of those changes will happen automatically.



A button that hasn’t been explained previously is “Tour”. Clicking on this button will assemble all records sharing the same tour code as the record you are in. Think of it as a “find on current tour”. When you click it, you will be asked if you want to view *all* records or just *active* records.

Load Doc

Documents associated with a Booking, perhaps a copy of a passport, can be attached to the record by clicking on the “Load Doc” button (there is also a button on the Documents (sub) tab on the To Do tab). You will be stepped through the process of naming and describing the document, then browsing, identifying and attaching the document. Once attached, the document can be viewed by clicking on the “up arrow” button on the To Do >Document tab.

Seat Assign

If you purchased the “Bus Seating” module as part of your system, the “Seat Assign” button will take you to the seating chart associated with the tour that the passenger whose record you have open is booked on. Once there you are able to assign the traveler to a specific seat.



<https://player.vimeo.com/video/805997926>

<https://player.vimeo.com/video/805997926>

Insurance

The sale of insurance can be automated (consider customization) in TourTools™, and throughout the system you will see fields and layouts that reference coverage. The specifics of *what* you sell and *how* you sell it will need to be programmed, and separate instructions for managing your program will be provided upon completion.

Reports Menu

Since there are so many reports and documents available in the Bookings database, they are divided over five different tabs, as follows:

Doc Queue Tab

On the left-hand side of the layout, there are buttons representing the various documents that you send to your travelers. These may include confirmations, receipts or invoices; or may be forms that need to be completed and returned to you.

A single click on a button will send the document in question to the document queue on the right. If you wish, all documents queued up can be run at the same time by clicking on the “Print Queue” button (any you want held back temporarily can be marked “Hold”, which will prevent their printing). If preferred, single documents can be run by clicking on the “Print” button preceding the document’s “name”. If the Client record to which the Booking is linked has an e-mail address, the document can be e-mailed, or it can be printed to paper; you will be given the choice when you click on the “Print” button.

If you are going to run a batch of documents from the queue, be sure to click in the box labeled “Paper” for any registrants who have e-mail but don’t want to receive their documents electronically. The process is completely automated, meaning the e-mail/paper choice will not be presented for each individual record.

As soon as the document is sent, the **Print Date** will auto fill, and the button labeled “Printed” will highlight. If there is a need to *re-print*, de-select the button by clicking on it and the document will go back into the queue, and/or can be manually reprinted or emailed.

If you have documents that need to be tracked—in other words, they need to be returned to you by the traveler (liability release forms is a good example)—click the “Trak” field **before you print it..** Once the form is returned, record the date on which that happened in the **Recd Date** field on the Doc Tracking tab.

Click on the trash can icon to remove a document from the queue.

The other buttons in this area include the “Queue Report” which will generate a report showing everything that is in the queue; and the “Clear Document Queue” button **which will clear the queue completely of**

any documents that have yet to be printed. Click in the field **Chose Type for Preview** to select the document you want to look at, then click the “Preview Document” button to view it.

Correspondence Tab

Group Leader Invoice: This is the invoice you will send to your group leader. The individual travelers linked to the GL/GL record are listed on the form, as are all charges and payments that have been swept to the GL account. If you prefer to send a summary of charges without all of the detail, run the GL Summary Invoice from the Doc Queue tab.

Unstored Fax/Unstored Letter: Use as a means to send a quick note or fax to one traveler or all passengers on a given tour. As the name implies, these are not permanently stored anywhere in the system; each time the form is used, you overwrite the text that was entered the last time.

Pax Reports Tab:

Rooming List: A list of all passengers confirmed on the tour, sorted on the tag number. Be aware there is another roomlist that can be generated from Ops, which is Vendor specific.

Rooming List Internal: Same as above but including some additional information about the travelers that might be helpful to the tour manager.

Ticket List: If your system has the “Ticket Module”, this report lists who is assigned what tickets.

Passenger Address List: Lists the names of all passengers on the tour, along with their addresses.

Cruise Dining List: This report displays the dining preference and dining notes loaded on the main entry screen in the Booking record. Dietary preferences loaded in the Client record are also referenced.

Passenger List: A list of travelers by name, also showing their Booking numbers.

Passport Report: This report displays the passport details, birth date and other information stored in Client.

Pax Meal Report: Information regarding your traveler’s menu selections are reflected on this report.

Waitlist Report: When this report is called, you are given the choice of listing passengers waitlisted on *all* tours or just the tour that shares the code of the record you’re in.

Special Occasion Report: Reflects information loaded on the main entry tab, having to do with special occasions being celebrated while on tour.

Insurance Report: Will be activated if and when your system is customized to accommodate insurance sales.

Universal Manifest: Reflects names, addresses, birthdates and passport details.

Departure Bus Manifest: Use this report to see “who’s getting on where”, based on input made on the

Departure screen. The \$\$ appearing to the left of the passenger name indicates that the traveler still owes you money.

Return Bus Manifest: This report is identical to the outbound manifest only showing the return day information.

Master Dep Manifest: A variation on a theme, this report lists passengers, their home phone numbers, and notes on where they are boarding the motorcoach.

Air Manifests: When you call this report, you are given the option of displaying data by “Pax” or by “Segment”. If you chose “Pax”, each individual traveler and their schedule will list; if you pick “Segment”, all travelers on a specific itinerary will display as a group.

Air Manifest – by PNR: This report reflects all passengers on a given tour who have flight itineraries confirmed, sorted by PNR record.

Financial Reports Tab:

Booking Totals B/O/C Status Report: This report lists passengers by tour, offering an indication of whether they are Booked, Optioned or Confirmed; also showing total charges, discounts, total paid and due, and cumulative totals.

Booking Totals Report: This is a list of tours, arranged in order of departure date, showing the number of passengers booked, total sales and total paid, as well as balance due. Cumulative totals appear at the bottom.

Balance Due: This report can be run by a specific date, date range or tour; and shows where there are balances owing.

Cash Report: This report can also be run by a specific date, date range or tour; and shows all payment activity. Even though it is called “cash” report, payments by check and credit card are also displayed.

Credit Card Report: This report is identical to the “Cash Report” as far as how it is called and what it displays; however, it displays only payments identified as “Credit Card”.

Late Payment Report: This report shows those individuals who are late with payments, comparing the payment history of the Booking to the deadlines loaded in Tour Master.

Refunds Due List: This report lists the Bookings that are due refunds, either as a result of an overpayment or because the reservation has been canceled.

Commission Due List: Commissions are considered payable as of the last day of a tour. This report can be called a single tour, all tours, or commissions due in the next 30 days. The presentation/sort is by tour.

Tour Element Inventory Report: This report (also available from Package) is usually run to determine why a Booking has waitlisted. Every element included in the Package will be reflected on the report, along with

an accounting of inventory loaded, sold, still available or sold out.

Booking Status Report: This is quite a “busy” report, which reflects, by tour, an overview of each individual booking record’s pertinent detail and an accounting of financial activity. Contact information for the traveler is also captured, as are booking numbers for the tour in question.

Sales Totals by Salesperson: If the Client record to which the Booking is linked has a Salesperson associated, or if a Salesperson is assigned at the time of booking, this report captures that relationship. The Salesperson Totals report can be called by tour or by a range of tours and presents the salesperson’s production in terms of passenger numbers and revenue. Any bookings not associated with a salesperson will appear at the top of the report.

Invoice Report: This is an overview, by tour, of passenger totals, and payment totals by type.

Tour Totals w/o Financial Info: This report is similar to the Booking Totals B/O/C Report but without any financial details.

Marketing Report: This report reflects how many bookings are attributable to your Source and Segment marketing efforts (values maintained in the Marketing Support File).

Labels, Tags and Vouchers Tab:

Avery Labels/Envelope: You can print one of two varieties of labels or #10 envelopes from Bookings. Once having clicked on the icon of choice, you will be asked if you want labels for everyone on a given tour or if you want to select specific records.

Name Tag/Luggage Tag: Clicking on this button will move you to the PAX records related to the tour referenced by the record you’re in. From here, select which type of tag or label you wish to run by clicking on the appropriate icon.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Canceling or Rebooking a Reservation

This section of the User Guide is still undergoing updates. Thanks for your patience!

Canceling or Rebooking an Entire Booking Record

If the entire booking is to be canceled, or if you need to rebook the traveler(s) on a different tour, click on the “Cancel” button. When you choose to “rebook”, you will select the code of the new tour and a new Booking record is created for you. You will, in either case, be asked if you want to charge a cancellation fee. If you reply in the affirmative, the fee will be calculated for you, based on the deadlines established in Tours(which amount can be overridden as appropriate). When you elect to “rebook”, any payments posted in the original record will be transferred automatically (less any cancellation fees) to the new record, and notes documenting the transfer will be tagged in both.

Canceling One Passenger in a Record

To the right of each Pax name listed on the front page of a Booking record, there is a small trash can. Use that when one of the passengers represented in a multi-traveler booking needs to be canceled. When doing so, keep an eye on related data in the record; by example, has the number of travelers reduced from 2 to 1? Should the Package confirmed no longer be “Double” but need to be adjusted to “Single”? To be sure, not all of those changes will happen automatically.

Last modified: March 29, 2023

Fundraising Distributions

This section of the User Guide is still undergoing updates. Thanks for your patience!

Fundraising Contributions

TourTools has the capability to manage fundraising contributions for school groups and manage the distribution to the participants going on the school trip.

Adding a Fundraising Contribution

Initiate a New Payment:

- Click on New Payment within the Payment tab.
- Enter the necessary payment details, such as amount and payment date.

Mark Payment as Fundraising:

- To specifically allocate this payment for fundraising, locate and check the box labeled Fundraising? found in the bottom left corner of the screen.
- Once the payment is posted, it will be tagged with 'FR' (Fundraising) in the system.

Utilizing the Fundraising Tab

Review Fundraising Contributions:

- Switch to the Fundraising tab to view a summary of all fundraising payments.
- This tab displays details like payment dates, amounts, and the total funds available for distribution.

Distributing Funds

Distribute Funds from Group Leader Booking:

- For group-level distribution, go to the Group Leader booking record.
- You can distribute funds equally or customize the allocation per participant.
- Optionally, certain participants can be omitted from the distribution.

Ensure Equal or Customized Distribution:

- The software recalculates the distribution amount each time changes are made, ensuring fair allocation among all participants.

Managing Passenger-Specific Distribution

Navigate to Individual Booking Records:

- For more targeted fund allocation, access the booking record of individual passengers.
- This feature allows for specific distribution decisions for smaller groups or unique cases.

Allocate and Distribute Funds:

- Determine the amount each passenger should receive based on their fundraising efforts or other criteria.
- Distribute the funds accordingly, ensuring all allocations are accurately recorded in the system.

Last modified: February 27, 2024

Booking Reports & Docs

This section of the User Guide is still undergoing updates. Thanks for your patience!

Invoices/Booking Documents Tab

Pax Invoice

This information will be added soon...

GL Summary Invoice

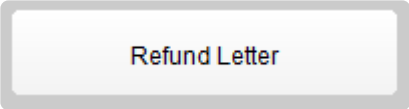
This information will be added soon...

GL Invoice

This is the invoice you will send to your group leader. The individual travelers linked to the GL/GL record are listed on the form, as are all charges and payments that have been swept to the GL account. If you prefer to send a summary of charges without all of the detail, run the GL Summary Invoice from the Doc Queue tab.

Final Documents

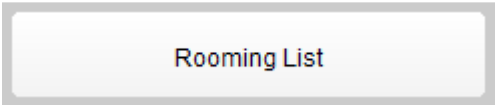
This information will be added soon...


 Refund Letter

This information will be added soon...

PAX Reports Tab

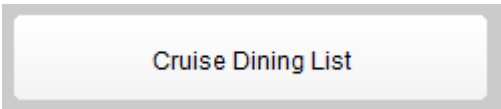
Lists


 Rooming List

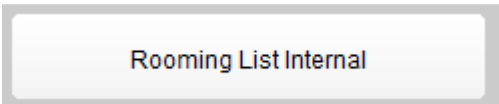
A list of all passengers confirmed on the tour, sorted on the tag number. Be aware there is another roomlist that can be generated from Ops, which is Vendor specific.


 Ticket List

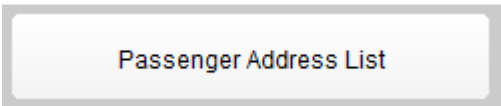
If your system has the “Ticket Module”, this report lists who is assigned what tickets. This is especially helpful when multiple Clients in one Booking have different tickets.


 Cruise Dining List

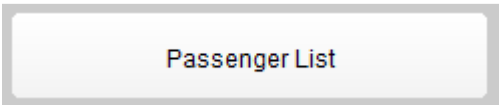
This report displays the dining preference and dining notes loaded on the main entry screen in the Booking record. Dietary preferences loaded in the Client record are also referenced.


 Rooming List Internal

Same as the Rooming List, but including some additional information about the travelers that might be helpful to the tour manager.

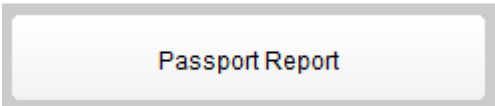

 Passenger Address List

Click this button to generate a list of the names of all passengers on this specific Tour, along with their mailing and physical addresses.


 Passenger List

Similar to the Passenger Address List, use this button to create a list of all travelers by name, along with their Booking numbers.

Reports


 Passport Report

Use this button to generate a report displaying all of the passport details, birth date, and other pertinent information stored in Client.

Waitlist Report

When this report is called, you are given the choice of listing passengers waitlisted on all tours or just the tour that shares the code of the record you're in.

Special Occasion Report

Reflects information loaded on the main entry tab, having to do with special occasions being celebrated while on tour.

PAX Meal Report

Use this button to generate a report of information regarding your traveler's menu selections, including preferences and allergies.

Insurance Report

This report will only be activated if and when your system is customized to accommodate insurance sales. Use this button to generate a report of all insurance being used on the specific Booking.

Go to Ops Reports

Use this button to navigate directly to the Operations Reports & Docs menu.

Manifests

Universal Manifest

Use this button to create a masterlist of all names, addresses, birthdates and passport details on a specific Booking.

Departure Bus Manifest

Use this report to see "who's getting on where", based on input made on the Departure screen. The \$\$ appearing to the left of the passenger name indicates that the traveler still owes you money.

Return Bus Manifest

This report is identical to the outbound manifest, but instead compiles the return day information.

Master Departure Manifest

A variation on a theme, this report lists passengers, their home

phone numbers, and notes on where they are boarding the motorcoach.

Air Manifests

When you call this report, you are given the option of displaying data by “Pax” or by “Segment”. If you chose “Pax”, each individual traveler and their schedule will list; if you pick “Segment”, all travelers on a specific itinerary will display as a group.

Air Manifest - By PNR

This report reflects all passengers on a given tour who have flight itineraries confirmed, sorted by PNR record.

Financial Reports Tab

Booking Totals B/O/C Status

This report lists passengers by tour, offering an indication of whether they are Booked, Optioned or Confirmed; also showing total charges, discounts, total paid and due, and cumulative totals.

Balance Due

This report can be run by a specific date, date range or tour; and shows where there are balances owing.

Cash Report

This report can also be run by a specific date, date range or tour; and shows all payment activity. Even though it is called “cash” report, payments by check and credit card are also displayed.

Booking Totals Report

This is a list of tours, arranged in order of departure date, showing the number of passengers booked, total sales and total paid, as well as balance due. Cumulative totals appear at the bottom.

Tour Element Inventory Report

This report (also available from Package) is usually run to determine why a Booking has waitlisted. Every element included in the Package will be reflected on the report, along with an accounting of inventory loaded, sold, still available or sold out.

Credit Card Report

This report is identical to the “Cash Report” as far as how it is called and what it displays; however, it displays only payments identified as “Credit Card”.

Late Payments Report

This report shows those individuals who are late with payments, comparing the payment history of the Booking to the deadlines loaded in Tours.

Sales Totals Salesperson

If the Client record to which the Booking is linked has a Salesperson associated, or if a Salesperson is assigned at the time of booking, this report captures that relationship. The Salesperson Totals report can be called by tour or by a range of tours and presents the salesperson’s production in terms of passenger numbers and revenue. Any bookings not associated with a salesperson will appear at the top of the report.

Marketing Report

This report reflects how many bookings are attributable to your Source and Segment marketing efforts (values maintained in the Marketing Support File).

Commission Due List

Commissions are considered payable as of the last day of a tour. This report can be called a single tour, all tours, or commissions due in the next 30 days. The presentation/sort is by tour.

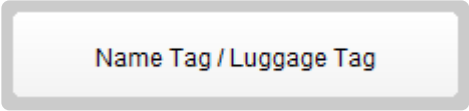
Invoice Report

This is an overview, by tour, of passenger totals, and payment totals by type.

Labels & Tags

AV-5160 Labels**Envelope****AV-5162 Labels**

You can print one of two varieties of labels or #10 envelopes from Bookings. Once having clicked on the icon of choice, you will be asked if you want labels for everyone on a given tour or if you want to select specific records.



Name Tag / Luggage Tag

Clicking on this button will move you to the PAX records related to the tour referenced by the record you're in. From here, select which type of tag or label you wish to run by clicking on the appropriate icon.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Credit Card Passthru Payment

This section of the User Guide is still undergoing updates. Thanks for your patience!

Entering a CC Passthru Payment

If a traveler makes a payment directly to a vendor associated with a tour and would like to include the payment on reports and invoicing, a payment can be entered via the Payments/Refunds tab in the Bookings module. Within the Payments/Refunds tab, click on the “New Payment/Discount” button under “Payment Information”.

Main
Notes
Prices / Options
Payments / Refunds
Fundraising
Contact Details
Group / Agency
Flights / Buse

PAYMENT OVERVIEW

Responsible for Payment

Cash or Check

\$0.00

Credit Card

\$0.00

Fund Raising

Refunds

Discounts

\$0.00

Transfers

\$0.00

CC Pass

\$200.00

Block Pmt Remind?

No

Block Late Pmt Remind?

No

Load Tour Deposits

Next Payment

Final Payment

Final Amount Due

\$1,550.00

Next Amt Due

\$1,550.00

Final Due Date

06/18/23

Next Due Date

06/18/23

Final Due?

Yes

Amount

Due Date

Due?

1st Deposit

\$150.00

05/09/23

No

PAYMENT INFORMATION

Insurance

Accept All

Decline All

Insurance Premium

Next Pay + Premium

New Payment/Discount

New CC or Scheduled Payment

New eCheck/ACH Payment

Type of Payment

Payment

Amount Paid

Check #

Transaction Notes

Received By

Credit Card Passthru

5/4/2023

\$200.00

Direct payment to Dave's Destinations

MJ

Card #

Exp MM/YY

FR: ☐

Cancel

Once within the Payment Entry window, select the Credit Card Passthru option from the Type of Payment

dropdown list. Select the date appropriate to when the payment was made, and include the total amount paid by the traveler to the vendor. A short description further identifying the transaction for future reference would be advised. Once the details in the Payment Entry window accurately reflect the details provided by the traveler, click the “Post” button at the bottom of the screen.

Payment Entry

Tour/Booking Information		Total Cost
Tour Name	Mitchell's Example Tour	\$1,750.00
PAX Full Name	Bruce Wayne	Payment Due \$1,550.00
Agent Name		Insurance Premium
		Next Pay + Premium
		Balance Due \$1,550.00

Type of Payment: Credit Card Passthru Check #: Received By: D

Payment Date: 5/22/2023 Payment Description: Bruce Wayne payment to vendor

Discount %: use decimal Insurance Premium Included in Payment: Total Payment: \$1,200.00

Calc Discount

CLEAR POST

To finish the record and update the accounts payable record to reflect the payment as received by the vendor, navigate to the Operations module and find the appropriate vendor. Once within the associated record for the tour, find the “New Payment” button under the Account Payable tab. Enter the amount paid by the traveler to update the record, making sure to include a description for future reference.

Main / Notes	Inventory	Accounts Payable	Itinerary Notes	Vouchers	Vendor Contact Info	A/P Summary	Email Log	Tasks / Docs	Reports
--------------	-----------	-------------------------	-----------------	----------	---------------------	-------------	-----------	--------------	---------

As of Last A/P Update: 5/4/2023 Account Status: [Open](#) [Close](#) [Update A/P](#)

ACCOUNTS PAYABLE

Vendor Payments

CONVERSION RATES - Foreign to USD

Currency	Current	Base Rate	Transaction
USD	\$1	\$1.000000	\$1.000000

[Adjust Rate](#)

Post Date	Transaction Description	Payment	Label	Currency	US\$	Method	QB Post?	Check #	Paid Date	New Payment
05/04/23	CC Pass	200.00	Amt	USD	200.00	CC	<input type="checkbox"/>		05/04/23	

Misc Cost	Misc Cost Description	# Driver	# Staff Single	# Staff Double	Room Total	Per Person	Fixed Total
		0	0	0	1,400.00	0.00	0.00

[Credit Card Passthru Payments](#) from [TourTools Software](#) on [Vimeo](#).

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: May 30, 2023

Payments & Refunds

Payment Processing Workflow

Once you're ready to process a payment for a client, you should first navigate to the booking list by selecting the "Bookings" option at the top of the screen, then "Booking List". From here, you can find the booking that relates to the client who you are processing a payment for and click on it to navigate to the "Booking Details" screen. Note that in order to actually make a payment, the booking needs to be active and must have a balance due.

Booking Details Record ID 38677

BOOKING / PAX INFO: Bahamas Cruise Wiley Coyote

Select/View Booking

- Mike Alexander 10-Day Holy Land Tour
- William Edmunds GL/GL
- Mike Alexander 10-Day Holy Land Tour
- William Edmunds PAX/GL
- Explore Grand Rapids
- Wilma Coyote PAX/PAX
- Mike Alexander 10-Day Holy Land Tour
- William Edmunds GL/GL
- Mike Alexander 10-Day Holy Land Tour
- P1First P1Last PAX/GL
- Mike Alexander 10-Day Holy Land Tour
- P2First P2Last PAX/GL
- Mike Alexander 10-Day Holy Land Tour
- UFirst ULast GL/GL
- Mike Alexander 10-Day Holy Land Tour
- P1First P1Last PAX/GL
- Mike Alexander 10-Day Holy Land Tour
- P2First P2Last PAX/GL
- Mike Alexander 10-Day Holy Land Tour
- P3First P3Last PAX/GL
- Explore Grand Rapids CXL
- Fred Flintstone PAX/PAX
- Lynne's Excellent Adventure
- Thomas Jefferson PAX/PAX
- Bahamas Cruise
- Wiley Coyote PAX/PAX

BOOKING DATE BOOKED: 01/25/23 STATUS: ACTIVE

Room Type: Double # Pax: 2 Tag: 3 Tag Color: Roommate Name: Total Cost: \$5,100.00 Total Paid: Balance Due: \$5,100.00 Due By: 12/07/22 Comm Due: Type Booking: PAX

Driver(s): Staff Singles Account Manager Source: CRUISE Responsible for: Refund Due: Type Invoice: PAX

Staff Doubles: Lynne Stolk Salesperson Segment: Cruise Line: Ship Name: Ship Registry: Cabin #: Cabin Category: Cabin Confirmation #

TOUR

Tour Name: Bahamas Cruise Tour Begins: 08/30/23 Tour Ends: 09/03/23

Tour #: 18578 Tour Code: CRU08282023 Division: Globe Tour & Travel

PAX

First Name	Last Name	Add/Remove	Nickname	Birthdate	Sex	Age	Email Address	Email	Meals	+ Pax
Wiley	Coyote	+	Tag#							Seat Chart
Wilma	Coyote	+	Tag#							Seat Chart

BOOKING NOTES

Booking Notes (Internal Use Only): Enter note here & click the pencil button to the right to save

Pax Hotel Notes

Return Manifest Notes

From the Booking Details screen, you will then navigate to the Payments/Refunds Tab, where you will be presented with three payment options to choose from. These options are:

- New Payment / Discount
- New CC or Scheduled Payment
- New eCheck / ACH Payment

If you would like to process a credit card payment, you will choose the “New CC or Scheduled Payment” button.

PRE-APPROVED CC INFORMATION

Date	Amount	Type	Account Number	ExpDate	Approval Status
Jul 10, 2023	\$100.00	Visa	4111 1111 1111 1111	07/24	

Detail Copy # [Icon]

New Credit Card New Check New eCheck

Client Submit Transaction Date Amount Bal Payment Type CC Trans Type Card Card # Exp MM/YY ID

Jul 10, 2023 100.00 1st Deposit SALE Visa 4111 1111 1111 1111 07/24 999

First Name Last Name Address City State Zip Country Company Name

John Smith 12 Cherry Ln East Coast PA 32606

Phone FAX Email PO Number Transaction Notes

Tour Payment

Authorization Code Response Msg Response Code Response Sub Code Resp Reason Code Response Reason Text

Cust Ref Trans ID

You will then see this screen and will need to ensure that fields are filled out correctly:

Once the fields have been filled out completely, then you should hit the “Submit” button in order to process the payment. A window will then appear, informing you on whether or not the payment was processed successfully. If it failed, then you will receive a message stating why the payment failed. If it was successful, then you will see a success message like the following:

Button: Submit (prePayId) v2

Transaction approved sucessfully. Payment will now be posted.

OK

Once you select “OK”, you will be taken to a “Payment Entry” screen.

Voiding Payments and Processing Refunds

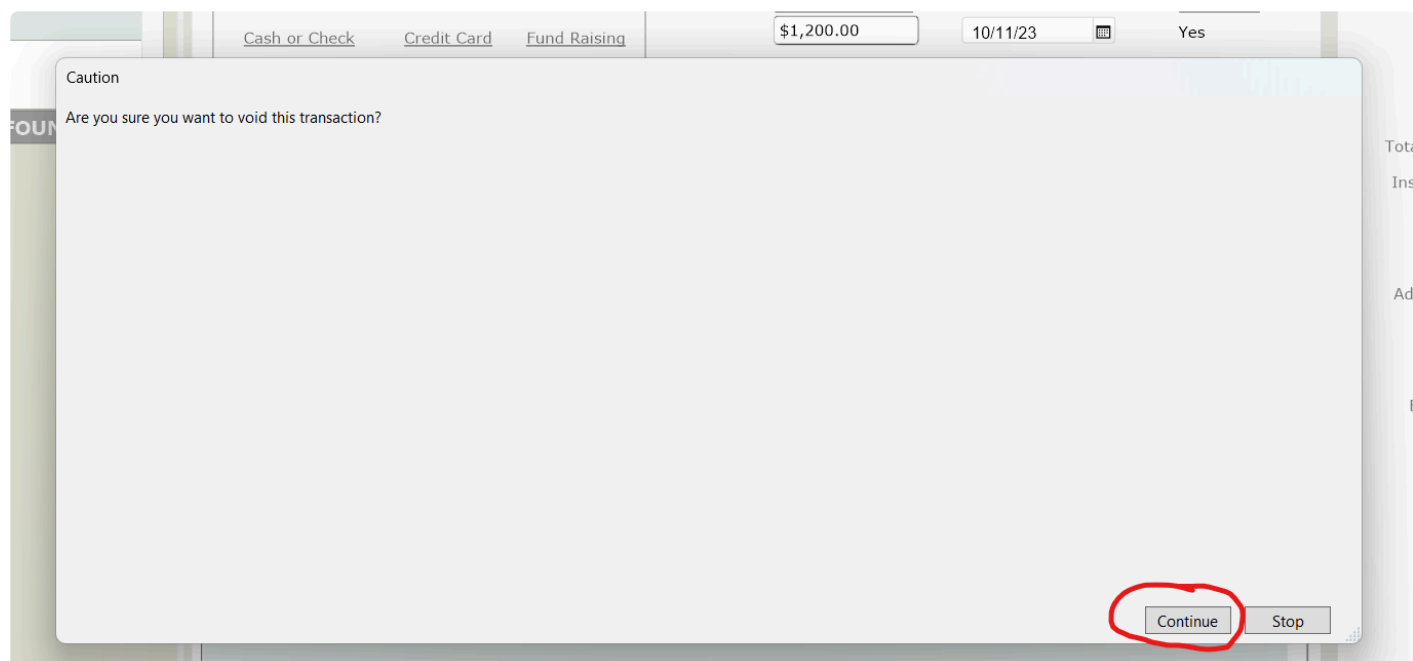
A payment can only be voided if it is still the same day that you submitted the payment for processing (or, if you have verified that your payment is in the “Unsettled” status in your payment server). Voiding the payment will remove it all together as if it never happened, and you will not need to submit a refund to your client. If it is not the same day that you submitted the payment, then you will need to process a refund instead.

VOIDING PAYMENTS

To void a payment, you will first need to go to the Payment / Refund tab. You should see something like the following:

Find the payment that you would like to void, and then hit the corresponding “Cancel” button. A window will pop up asking if you would like to void or refund. Click “Void”.

You will then be asked “Are you sure you want to void this transaction?” If you would like to continue with voiding the payment, then click “Continue”.



From here, you will be redirected back to the Payment Entry screen. Information will be autopopulated into the fields with Payment Type and CC Trans Type both filled in with “VOID”. At this point, you have successfully voided your transaction.

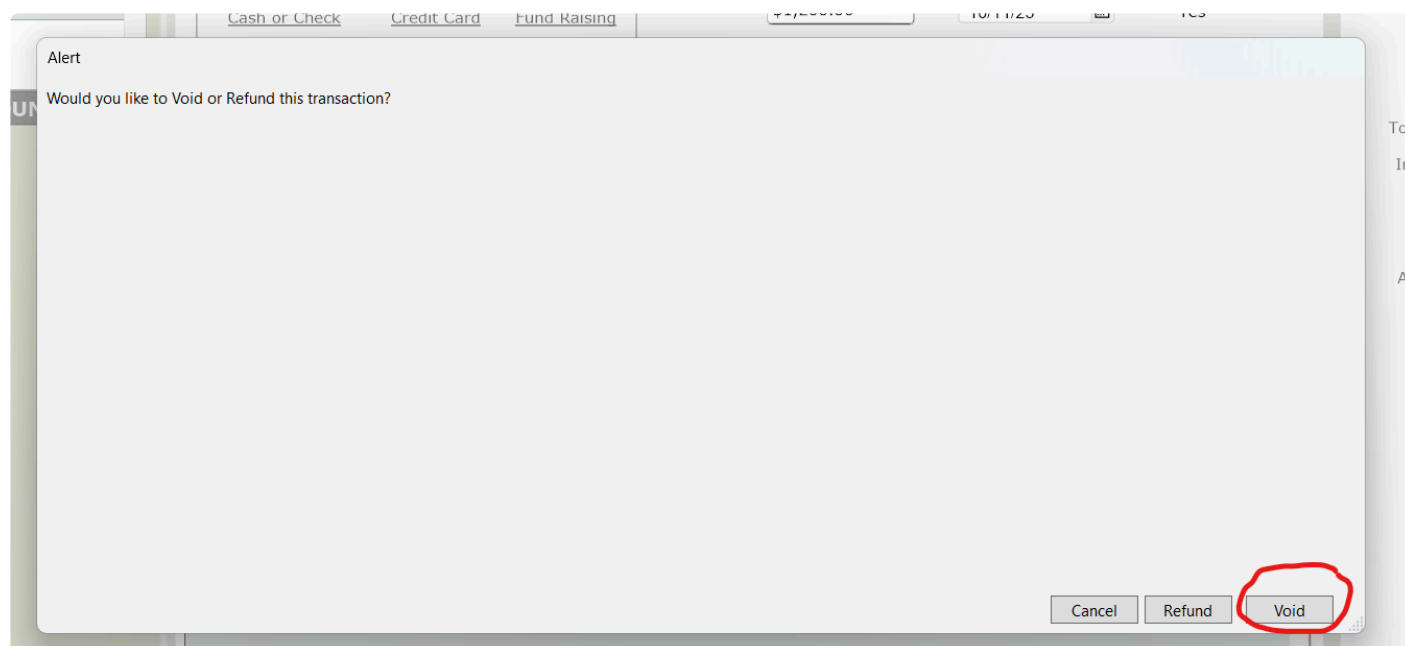
PROCESSING REFUNDS – CREDIT CARDS

To process a refund, you will first need to go to the Payment / Refund tab. You should see something like the following:

Type of Payment	Payment Date	Amount Paid	Check #	Transaction Notes	Received By
Credit Card	7/10/2023	\$100.00		Tour Payment	admin

Card # *****1111 Exp MM/YY 07/24 FR: ☐

Find the payment that you would like to refund, and then hit the corresponding “Cancel” button. A window will pop up asking if you would like to void or refund. Click “Refund”.



You will then be asked “Are you sure you want to credit this transaction?” If you would like to continue with voiding the payment, then click “Continue”.

You will then be prompted to re-input the original credit card details.

PROCESSING REFUNDS – CHECK

The TourTools software offers a streamlined process for managing refunds through checks, particularly when there’s a cancellation penalty involved. This documentation provides a general guide on how to process refunds by check within the platform.

Steps:

1. Accessing the Deadlines Tab in Tour:

- Navigate to the deadlines tab within the specific Tour section to understand the cancellation penalties.
- The system provides the effective cancellation penalty based on the current date in relation to predefined penalty dates.

2. Initiating the Cancellation:

- Go to Bookings.
- Locate and click on the record of the traveler who wishes to cancel.
- Press the Cancel button to initiate the cancellation process.

3. Determining the Cancellation Fee:

- When prompted if a cancellation fee should be charged, select “yes”.

- The system will automatically assess the date and propose a cancellation fee based on the predefined penalty dates (e.g., a fee as determined by the deadlines tab).

4. Calculating the Refund Amount:

- The refund amount is calculated by subtracting the cancellation fee from the total amount the traveler has paid so far.

5. Entering the Refund:

- Navigate to the Refunds tab.
- Click on the Enter Refund Check button.

6. Entering Check Details:

- A new layout will appear.
- The primary field to fill out is the one labeled "Check #". Enter the check number here.
- Other fields will typically be auto-populated or can remain as defaults unless there's specific information to add.

Completion:

- After entering the necessary details and finalizing the refund, the traveler's record will update to reflect the recent transactions.
- Confirm that the balance due for the traveler's record indicates a zero balance, signaling the refund process's completion.

Last modified: October 31, 2023

Chapter 7: Operations

The Operations Module – The End of the Story

Operations is where passenger counts from Bookings impact the costs of Contracted Services from Vendor, thereby creating Accounts Payable. Operations is where you can also produce travel documents for passengers, escorts and drivers – as well as generate inventory/utilization reports.



For every Contracted Services record used to build an itinerary in one or more Packages, there will be a corresponding Operations record. This record will reflect the price and inventory data as loaded back in Vendor; as well as the number of passengers using that service once there is activity in Bookings. Operations is more or less the “end of the story”, since it’s here that you will come to record payments to your vendors, as well as run a variety of reports and documents when it comes time to finalize your tour.

Last modified: March 27, 2023

Operations Module – List View

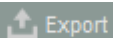
All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

Operations List									
Found Count: 10									
QUICKFIND									
Tour Code	Vendor	Description	Date Begin	Print Control	PAX	S	D	I	Q
EXPGR06252023	JW Marriott Hotel	Double-Double Rooms including Buffet Breakfast	06/25/23	X Esc/Drv X Vch X Itin X Conf	2	0	1	0	0
EXPGR06252023	Sundance Grill	Three Course Dinner including Gratuity	06/27/23	X Esc/Drv X Vch X Itin X Conf	2	0	0	0	0
HLALE1023	Friends Tours, Inc	Deluxe Motor Coach (65)	10/13/23	X Esc/Drv X Vch X Itin X Conf	1	0	0	0	0
HLALE1023	Friends Tours, Inc	St. Peter's Fish Lunch	10/14/23	X Esc/Drv X Vch X Itin X Conf	2	0	0	0	0
CRU08282023	Lynne's Cruise Company	Inside Cabin	08/28/23	X Esc/Drv X Vch X Itin X Conf	3	1	1	0	0
CRU08282023	Lynne's Cruise Company	Outside Cabin	08/28/23	X Esc/Drv X Vch X Itin X Conf	5	1	2	0	0
DCPERF10282023	XYZ Charter Company	55-Seat Motorcoach	10/28/23	X Esc/Drv X Vch X Itin X Conf	4	0	0	0	0
DCPERF10282023	Courtyard Alexandria Pentagon South	Double-Double Rooms including Buffet Breakfast	10/28/23	X Esc/Drv X Vch X Itin X Conf	5	1	1.5	0	.25
DCPERF10282023	Clyde's of Georgetown	Three-Course Dinner including Gratuity	10/29/23	X Esc/Drv X Vch X Itin X Conf	5	0	0	0	0
EXPGR06252023	Friends Tours, Inc	Tiberias 4 star hotel	06/25/23	X Esc/Drv X Vch X Itin X Conf	4	0	2	0	0

Feature Buttons

Export



Export

Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

A/P List



A/P List

This button will take you to the accounts payable list view.

Itinerary Filter



Itinerary Filter

This button will filter the list to show only itinerary items related to the currently selected Ops record.

Find



Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having

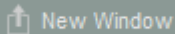
clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen. When you are ready to initiate the process, click on the Submit button. Click the Stop button to abort the find process and return to your previous found set.

Reports



Use this button to navigate to the Bookings Reports tab. Learn more about the reports and labels on this tab in the [Operations Reports & Docs topic](#).

New Window



Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Operations Module – Detail View

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Operations record.

Operations Details Record ID 83763

OPERATIONS INFO: Lynne's Cruise Company CRU08282023

Select/View Record

- JW Marriott Hotel - Double-Double Rooms including Buffet
- Sundance Grill - Three Course Dinner including Gratuity
- Friends Tours, Inc - Deluxe Motor Coach (65)
- Friends Tours, Inc - St. Peter's Fish Lunch
- Lynne's Cruise Company - Inside Cabin
- Lynne's Cruise Company - Outside Cabin
- XYZ Charter Company - 55-Seat Motorcoach
- Courtyard Alexandria Pentagon South - Double-Double Rooms
- Clyde's of Georgetown - Three-Course Dinner including Gratuity
- Friends Tours, Inc - Tiberias 4 star hotel

VENDOR/TOUR DETAILS

Vendor: **Lynne's Cruise Company** Vendor #: 4705

Pack Type: **USD** Currency: **Financial** Type of Ops Rec: **None** Inventory Type: **None**

PKG Description: **Inside Cabin**

Tour Code: **CRU08282023** Tour Name: **Bahamas Cruise** Tour #: 18578 Start Date: **08/28/23** End Date: **09/01/23**

Date Request Sent: Vendor Confirm #: Space Status: **No Req**

Date Contract Rec'd: Cancellation Date: Rate Status: **Est**

Record Type: **Financial**

PRINT/APPEAR ON DOCS

Vendor will appear on the documents selected below

- ☒ Escort, Group Leader and Driver's Notes
- ☒ Group's / Traveler's Itinerary
- ☒ Voucher
- ☒ Confirmation

Excluded from Itin? **NO**

CRITICAL NOTES

Important notes that should be visible at all times.

PACKAGES

Package #	Package Name
15930	Inside Cabin

NOTES

Compose a new note here, then click the [+ Note] button.

Navigation: Main / Notes | Inventory | Accounts Payable | Itinerary Notes | Vouchers | Vendor Contact Info | A/P Summary | Email Log | Tasks / Docs | Reports

Feature Buttons

List View

Use this button to return to the Operations List View.

A/P List

Use this button to jump to the accounts payable list view.

Find Tour

This button will filter the found set to only Operations records related to the current Tour.

Cancel

This button will allow you to cancel services from this Vendor (for the current Tour or ALL Tours).

< Tours

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Tour record related to this Operation.

< Packages

Use this button to jump to the Package related to this Ops record.

< Contracted Service

Use this button to jump to the Contracted Service related to this Ops record.

< Vendors

Use this button to jump to the Vendor related to this Ops record.

Find

You can search for one or a group of record(s) by clicking on the “Find” button. Having clicked the button, you will be asked if you want to stay on the current screen or if you want to use the “Find” screen. This second option allows you to search additional fields not available on the current screen.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Operation Details Layout

To keep things simple, we’re going to address first of all the information seen on the top half of the Operations record. After that, we’ll go tab by tab through the bottom section.

The Vendor name and related Tour information are displayed at the top left and in the color-shaded fields. You will also see the default currency, Package related details, and confirmation/cancellation fields for tracking purposes. Use the +INFO button to add “Info Records” to your final itinerary. For more details on Info records, jump to the following section on [Creating New Operations Records](#).

VENDOR/TOUR DETAILS				Pack Type	Currency	Type of Ops Rec	Inventory Type	Date Request Sent	Vendor Confirm #	Space Status
Vendor	JW Marriott Hotel			AIR	USD	Financial	RM			No Req
Vendor #	4702			Description	Double-Double Rooms including Buffet Breakfast			Date Contract Rec'd	Cancellation Date	Rate Status
Tour Code	EXPGR06252023			Tour #	18575	Start Date	06/25/23	End Date	06/30/23	Est
Tour Name	Explore Grand Rapids								Record Type	Financial
+ Info Record										

Main / Notes	Inventory	Accounts Payable	Itinerary Notes	Vouchers	Vendor Contact Info	A/P Summary	Email Log	Tasks / Docs	Reports								
PRINT/APPEAR ON DOCS Vendor will appear on the documents selected below <input checked="" type="checkbox"/> Escort, Group Leader and Driver's Notes <input checked="" type="checkbox"/> Group's / Traveler's Itinerary <input checked="" type="checkbox"/> Voucher <input checked="" type="checkbox"/> Confirmation Excluded from Itin? NO		CRITICAL NOTES Important notes that should be visible at all times.			PACKAGES <table border="1"> <thead> <tr> <th>Package #</th> <th>Package Name</th> </tr> </thead> <tbody> <tr> <td>15926</td> <td>Core Package</td> </tr> <tr> <td>15928</td> <td>Tour Manager Package</td> </tr> <tr> <td>15932</td> <td>Driver Package</td> </tr> </tbody> </table>					Package #	Package Name	15926	Core Package	15928	Tour Manager Package	15932	Driver Package
Package #	Package Name																
15926	Core Package																
15928	Tour Manager Package																
15932	Driver Package																
NOTES Compose a new note here, then click the [+ Note] button. <div style="text-align: right;">+ Note</div>																	
12/25/2022 Developer: Received final confirmation																	

Main / Notes Tab

The fields contained on the Main / Notes tab (see example above) are pretty straightforward. Note that the "Type of Operations Record" will be "Financial" if the Contracted Service record represented has a cost loaded. If not, the Operations record will be classed as "Op Info". If you entered a beginning and end time for the service in Contracted Service, it will be displayed. If not, you may want to load it here (doing so will not cause the Contracted Services record to be updated).

In the "print control check box" area(labeled Vendor to Appear & Print On), you will designate where you want this item to appear—whether on the Escort's, Driver's and Group Leader's Notes; on the Group's/ Traveler's Itinerary, and/or on a voucher. You can select or de-select by clicking on the check boxes.

In the portal at the bottom right of the screen, all Packages that share the Contracted Service record and that are linked to the same tour will list. If the listing is colored green, that is an indication that the Package is published. You may see additional listings colored red; those Packages are related to the same tour but are unpublished.

Inventory Tab



On the Accounts Payable tab, there is a button labeled "Update A/P", which you will want to get in the habit of clicking immediately upon entering Ops. The script being called sweeps current booking numbers to the record, thereby also updating the current balance due.

VENDOR/TOUR DETAILS		Pack Type	Currency	Type of Ops Rec	Inventory Type	Date Request Sent	Vendor Confirm #	Space Status
Vendor	Vendor #	PKG	USD	Financial	None	<input type="text"/>	<input type="text"/>	No Req
Description		Deluxe Accommodations with Hot Breakfast				Date Contract Rec'd	Cancellation Date	Rate Status
Tour Code	Tour Name	Tour #	Start Date	End Date				
GMO032512	Branson Buddies Tour	5969	03/25/12	03/26/12				
					+ Info Record		Record Type	
							Financial	

Main / Notes	Inventory	Accounts Payable	Itinerary Notes	Vouchers	Vendor Contact Info	A/P Summary	Email Log	Tasks / Docs	Reports
--------------	-----------	------------------	-----------------	----------	---------------------	-------------	-----------	--------------	---------

INVENTORY

CONFIRMED BOOKINGS		UTILIZATION		INVENTORY	
For Tour Personnel by Type		Last A/P Update: 12/13/2011		Booked & Available	
# Fixed	# Drivers	# TTL Pax Adult	# Rooms, Single	Inventoried	Booked
0	<input type="text"/>	32	4	PP	<No
Room Rates	# STF Singles	# TTL Pax Child	# Rooms, Double	Single	<No
	<input type="text"/>	0	14.0	Double	<No
Room Billing	# GL Doubles		# Rooms, Triple	Fixed	<No
	<input type="text"/>		0.0		
			# Rooms, Quad		
			0.0		

BOOKED TOUR		COMPS		SHIP COMP POLICY	
Current Tour		Calculated (based on levels from vendor) & Manual Adjustments		From Tours	
PP	RM	PP	RM	PP	RM
Totals	32	18	0	1	Manual
Room total is calculated based on "direct" bookings, i.e. not including numbers loaded in GL/GL Booking		From Vendor		* Make Adjustments Here	

* If you are entitled to comps beyond what are being calculated based on your input in the Contracted Service reflected here, you can adjust the total by entering a number in the PP or the RM S (single) or RM Dbl fields. Adjustments can be made on the Accounts Payable screen as well. Manual comps will be calculated for the current service only.

Moving from the left to the right, the panels you see on the Inventory screen show inventory and utilization. This is information for your reference; you will not make any changes here.

If the record represents a fixed-cost service, a motorcoach by example, the **# Fixed** field will reflect the number booked.

The fields **Rm Rates** and **Rm Billing** reflect the billing structure as established in the Contracted Service record.

Numbers will display in the **# Drivers/STF SING/STF DBLS** fields if reservations identified as those types have been made back in Bookings.

In the middle panel, you will see an indication of how many adults (**# TOT PAX**) and how many bookings designated "Child" (**# TOT Child**) are using this particular service and, if there is a room component to the service, how many single, double, triple, and quad rooms have been booked. Directly adjacent, you see an indication of how many passengers will occupy those rooms.

If everything is in order, these numbers will "balance", as in our example where we've highlighted passenger numbers in yellow (notice that singles are not broken out; the number you see in the **# Rooms Single** field represents both the room as well as passenger count); and room counts in blue. As a reminder, triple and quad rooms are impacting the Dbl inventory loaded back in the Contracted Service record. Be on the watch for imbalances—by example you see two doubles but only three travelers. That should prompt an investigation of whether, back in Bookings, a single passenger is perhaps confirmed as a Double (Package) and should instead be a single.

Tour Information			
<u>Tour Name</u>		<u>Vendor</u>	
Branson Buddies Tour		<No Access>	
<u>Service Date</u>	<u>Currency</u>	<u>Ex Rate</u>	<u>Total</u>
3/25/2012	USD	<No Access>	\$1,642.84
			<u>BalanceDue</u>
			\$1,642.84

<u>Payment Date</u>	<u>Payment Method</u>	<u>Expense Account</u>
08/09/22	Check	Tour Admissions
<u>Transaction Description</u>	<u>Check #</u>	<u>Expense Label</u>
Deposit	1234	Amt
		<u>Amount Paid</u>
		\$50.00
Clear		Post

Begin by clicking on the button labeled “New Payment”, which will open up this window. Today’s date will drop into the **Payment Date** field and your name or initials will load to the **Entered By** field.

Pick a **Payment Method** from the value list that presents; **Check**, **CC (credit card)** or **Transfer**. Check and CC are obvious; Transfer denotes an electronic payment.

The values available to pick from in the “Expense Label” are **Amt**, **Adj** and **Credit**, respectively.

“**Amt**” will be used most often; it identifies an ordinary payment.

“**Adj**” might be used if a payment check sent previously was voided. Do **not enter the Amount Paid as a negative** as TourTools™ recognizes it for what it is when you select Adj as the label and Adjustment in the “Transaction Description” field.

“**Credit**” will be used when posting a refund or a credit memo. In the **Transaction Description** field choose Refund Rec’d or Credit Rec’d, respectively. The amount goes in as a positive number.

The Transaction Description field also displays a value list, the values being **Deposit**, **Final Payment**, **Credit Rec’d**, **Refund Rec’d**, **Adjustment** and **CC Passthru**. CC Passthru will be used to identify a payment made using a traveler’s credit card, the best example being...you made a deposit to Viking Cruises on behalf of passengers Smith using their card. When such a transaction occurs, **there should always be a corresponding payment entry in the related booking record**, in this case, giving the Smiths credit for the amount of the deposit made to Viking.

In the **Amount Paid** field, enter the amount of the payment being made. Clicking on the “Total” button will auto-load the total balance due.

The **Expense Account** field contains a value list identifying the expense account to which the payment should be credited (for systems interfaced to QuickBooks).

When all entries are complete, click on the “Post” button.

If your system is not interfaced to QuickBooks, deselect the “QB Post?” checkbox and manually make

entries in the **Check #** and the **Paid Date** fields.

More about Manual Adjustments

Manual Adjustments might include forcing a comp (briefly addressed earlier), or perhaps adding an extra guest for dinner. If the vendor has agreed to a comp policy that is more lenient than what was first agreed upon and which is reflected in the Contracted Service record, use the **Manual Adj** fields on the Rooms Expense tab or the **Adjust** field on the Per Person Expenses tab to adjust as appropriate.

The field labeled **Misc Cost**, which can accommodate positive or negative amounts, is generally used to make adjustments which are “random”. As an example, the aunt of one of your travelers is going to join the group for dinner. In the Ops record representative of the restaurant meal, enter \$25 in the cost field and in the **Misc Cost Description** type “Smith Dinner Guest”.

Clicking on the “\$ Update Tots” button will adjust the A/P amount being calculated, to include these kinds of miscellaneous adjustments.

CONVERSION RATES - Foreign to USD			
Currency	Current	Base Rate	Transaction
USD	<input data-bbox="337 898 472 932" type="text" value="?"/>	<input data-bbox="480 898 634 932" type="text" value="\$1.000000"/>	<input data-bbox="667 898 829 932" type="button" value="Adjust Rate"/>
			<input data-bbox="878 898 992 932" type="text" value="\$1.000000"/>

A Note About Foreign Currencies:

If the vendor will be paid in a currency other than US Dollars, the exchange rate *in effect when the Ops record was created* will be reflected in the **Current Rate**, the **Base Rate** and the **Transaction Rate** fields. In this example, the rate was set at \$1 USD = .80 CAD.

At the point you are ready to make a payment, you want to consider whether the rate is still accurate or if it needs to be adjusted; this in order that the record will capture the *true cost* of the payment to the Vendor, which—of course—is critical if expenses are to be properly reflected on the P/L that you will eventually run.

If the rate needs to be updated, enter it into the “Current Rate” field, then click on the “Adjust Rate” button. Doing so will reset the “Transaction Rate”. The “Base Rate” will reflect what was in place originally.

Enter Exchange Rates		
1\$ USD will buy	<input data-bbox="451 1486 613 1528" type="text" value="1.298"/>	CAD
1 CAD will cost	<input data-bbox="451 1549 613 1591" type="text" value="1"/>	USD (Payments)
1 CAD =	<input data-bbox="451 1612 613 1654" type="text" value=".90"/>	USD (Costing)

Note: The content of the “Current Rate”

field, is directly linked to the field labeled “USD (Payments)” back in the Currency Support File. In other words, updating one will update the other. So, if we were to change the .80 value in the previous record to .85, that is what you’d see back in the Currency Support File. What is important to note, however, is that the “Transaction Rate”—the one that really matters when it comes to payments calculating properly here in Ops— will not update unless you make that happen. Rest assured, that exchange rates in effect when Contracted Service records became part of the itinerary

back in Package are not affected by anything done here. Those rates are pulled from the “USD (Costing)” field and remain in effect until you update them (as described in Chapter 5).

TOTALS:		Recalculate
CAD	US\$	
\$20.00	\$17.00	
AP Tot Native	AP Tot \$	
SubTot Pmts	SubTot Pmts	
Sub Tot Adj	Sub Tot Adj	
SubTot CR	SubTot CR	
\$20.00	\$17.00	
Bal Due	Bal Due	

Glancing to the bottom right, click on the “Recalculate” button to update the A/P total in “real time”; taking into account the current exchange rate as well as the current number of whatever services represented in the record have been sold. On the left, the field labeled “AP Tot Native” will reflect the current amount owing in the local currency. On the right, the AP total in USD will be reflected in the “AP Total \$”.

As payments are made, those will likewise be reflected in local currency as well as US Dollars in the fields labeled **Pmts**.

In the TOTALS pane, the value of any manual adjustments made (explained earlier) will be reflected in the **Adj** fields; and any payments identified as “CR (credits)” when posted will populate the **CR** fields.

Itinerary Notes Tab

ITINERARY NOTES			
Event or Place Name (for itinerary)	Service Start Time	Service End Time	Include Vendor's Contact Info?
Roland Through New Orleans, LLC			<input type="checkbox"/> Phone <input type="checkbox"/> Description <input type="checkbox"/> Address

If you entered notes in the Itinerary,

Escort or Driver notes fields when you created your Contracted Service records back in Vendor, those notes will flow to the Ops records, where they can be edited one last time. Notes can otherwise be entered right here in Ops. The beginning and end times of your service also appear—and can be altered—on this screen. The field labeled “Event or Place Name” reflects the description given to the Contracted Service and can be edited as you might wish to become the “header” for the service as included on the final itinerary.

Vouchers Tab

If you plan to generate group vouchers from the system, do your set-up here. “Voucher” must be checked in the

print control list and you can embellish the description as appears in the “Services on Voucher” field if you wish. If additional remarks on the voucher are desired, enter them in the field labeled “Voucher Remarks.”

GROUP VOUCHER

Voucher Label

Vendor Confirm #

☐ Phone
☐ Address
☐ Description

Itinerary Description
Clicking the "Description" check box (above) will load the text below into the field for display on the itinerary and vouchers. Text formatting WILL carry over to the Itinerary.

When your input is complete, run a group voucher from the Operations Reports menu. Once that is done, the “Voucher Issue Date” will fill in. If you make changes and run it a second time, the “Voucher Change Date” will display. To void a voucher, click in the “VOID?” field and select the number one that appears.

Vendor Contact Info Tab

You can reference the contact and address information from Vendor, as well as a number of other fields of information, here on this layout.

A/P Summary Tab


It might be advisable to get an overview of what is owed to a particular vendor for *all* services before issuing a check for the one item you are looking at. The Vendor A/P Summary layout will display other services booked with the same vendor for the same tour; and corresponding balance due amounts.

As of Last A/P Update: 6/21/2018 Update

VENDOR & ACCOUNTS PAYABLE									
Howard Johnson by Wyndham Quincy		Continental Breakfast		USD	1	1			
Vendor		Description		Currency		Conv to USD \$		Current Exchange Rate	
Sat 29 Sep 18	Sat 29 Sep 18	22131	Financial	17386	Adult Package				
Service Start Date		Service End Date		Tour #	Type Ops Rec	Vendor #	Package Name		
Description	Date Begin	Time Begin	Date End	Active	Total	Paid	Bal Due	Ops#	Pay
Double Double Rooms	Fri 28 Sep 18		Mon 1 Oct 18	Yes	5,700.00		5,700.00	6601	Tot>>
Continental Breakfast	Sat 29 Sep 18		Sat 29 Sep	Yes	300.00		300.00	6602	Tot>>
Continental Breakfast	Sun 30 Sep 18		Sun 30 Sep	Yes	300.00		300.00	6603	Tot>>
Continental Breakfast	Mon 1 Oct 18		Mon 1 Oct 18	Yes	300.00		300.00	6604	Tot>>

In this example, there are four separate services booked with the Howard Johnson by Wyndham Quincy Hotel. Two things happen if you click on the buttons labeled “Tot” at the end of each portal row. First, the total (reflected in the column labeled “Bal Due” will be swept to the Summary portal below. Secondly, that balance will be loaded as a pending payment on the Accounts Payable tab. If you want to proceed with

actually processing that payment, you will want to—as usual—enter a check number (unless the payment is being made by another method) and the pay date. For the sake of clarity, the record highlighted in pink is the record that you have open.

ALL OPS RECORDS FOR CURRENT VENDOR AND CURRENT TOUR									
Description	Date Begin	Time Begin	Date End	Active	Total	Paid	Bal Due	Ops#	Pay
 French Quarter Walking Tour	03/02/12		03/02/12	Yes	450.00		450.00	2548	Tot>>
 New Orleans City Tour	03/02/12		03/02/12	Yes	150.00		150.00	2549	Tot>>
Total Costs Vendor/Tour							AP Tot Native	AP Tot \$	
							600.00	\$600.00	

The last button to note is “Connect”. In instances where you had a service attached to a Package—for which you had posted a payment here in Ops—which you replace in Package because of a date change, the *original* Ops record will be replaced when you finish with the substitution. In such a situation, the payment posted to the original record will in a sense be “orphaned” but is recognized in the “Summary of All Ops Records ...” area.

When you click on the “Connect” button related to that payment, it will be queued up on the Account Payable tab, after which you will make the usual entries (check number, payment date, etc.) to complete the transaction. Note that the original payment date will be reflected on the far left in the “Post Date” field; you may want that to again be the date you enter in the “Paid Date” field.

Email Log Tab

This tab contains a log of emails sent to the Vendor out of TourTools. Hover over the various sections to see additional details. If an attachment was included (and if it was selected to be saved to the Ops record at the time it was sent) you will find that attachment in the Document Library on the **Tasks / Docs** tab.

Tasks / Docs Tab

On either tab, click on the “+” button to create a new task or add a new document to the library. As in all modules, the tasks will come find you on your dashboard when the due date approaches.

Reports Tab

There are several reports included in the Operations database. Note that many, like the notes for the tour personnel, display first in Browse mode, meaning you are able to make final edits just before previewing and printing. For details, see the [Operations Reports & Docs topic](#).

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Creating New Operations Records

Operations is where passenger counts from Bookings impact Contracted Service costs from Vendor, thereby creating Accounts Payable. Operations is where you can also produce travel documents for passengers, escorts and drivers – as well as generate inventory/utilization reports.

For every Contracted Service used to build an itinerary in one or more Packages, there will be a corresponding Operations record. This record will reflect the price and inventory data as loaded back in Vendor; as well as the number of passengers using that service once there is activity in Bookings. Operations is more or less the “end of the story”, since it’s here that you will come to record payments to your vendors, as well as run a variety of reports and documents when it comes time to finalize your tour.

As you finish creating and publishing your Package, you will be asked if you want to create Operations records. If you chose not to do it at that point, you can create them at any time by going to the List View layout in Package and clicking on the “Load Ops” button.

VENDOR/TOUR DETAILS		Pack Type	Currency	Type of Ops Rec	Inventory Type	Date Request Sent	Vendor Confirm #	Space Status
Vendor	Vendor #		USD	CXL	None			No Req
Roland Through New Orleans, LLC		8371		Description		Date Contract Rec'd	Cancellation Date	Rate Status
		Natchez Steamboat Dinner and Jazz Cruise					01/30/12	
Tour Code	Tour Name	Tour #	Start Date	End Date				
GMS022612		5495	02/26/12	02/26/12	+ Info Record			
					Record Type			
					CXL			

Creating Ops Info Records

It is possible to create records right in Ops that are not truly associated with a Package element but rather are needed to create “filler” in the itinerary. These records are purely informational and have no financial component

By example, let’s say you want to include in your itinerary a remark to the effect that the group may expect to be welcomed at Hotel XYZ with a punch and cookies reception.

With the Ops record that precedes the hotel overnight open, click on the “New Info Record” button. The record that is created will be classified as an “Ops Info Rec” as opposed to “Financial” since, as mentioned, it has no financial component. Enter the “Event Name” as well as the appropriate text in the “Itinerary Notes” field.

Two things to keep in mind: The info record will appear after the record you used to create it, and will appear only on the itinerary. Be sure to double check the date and time assigned to the newly created record and delete and start again if it is sequenced incorrectly.

Cancelling One or All Ops Record(s)

If it becomes necessary to cancel the service represented in an Ops record, use the navigational button labeled “Cancel”. When you do, you will be asked if you want to cancel just the record you have open, or all of the records related to the same trip. Regardless of your reply, in the upper right corner of the Main tab,

the field labeled “Type of Operations Record” will be stamped “CXL” and the “CXL Date” will reflect the date the action was taken. The cancellation date will also be reflected on the To Do tab, and on the Accounts Payable tab the sales figures will be stripped away, possibly leaving the record as “overpaid” if payments to the vendor were previously made.

As appropriate, refer to the addendum “Cancelling a Tour and Closing Out Booking/Operations Records” for instructions for zeroing out the record.

Replacing (Renaming) an Ops Record

In the eventuality a Vendor changes names—maybe a hotel that has been rebranded or a misspelling occurred when the record was created and not caught until some time later—check with TourTools™ Support for assistance. It may be possible for a developer to create a script to correct the problem, or we can step you through the “repair and replace” process.



An additional button that hasn’t been described previously is the “Tour” button. Clicking on it will assemble all Ops records related to the same tour as the record you are in.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Operations Reports & Docs

This section of the User Guide is still undergoing updates. Thanks for your patience!

Reports & Documents

Itinerary	Quick Tour	Voucher
Group Leader Notes	Inventory Utilization	A/P Report US\$
Escort Notes	Vendor Usage Report	A/P Report Native
Driver's Notes	Passenger Rooming List	Disbursement Report
Quick Driver Notes	Passenger Itinerary	Go to Booking Reports

Click on any of these buttons to preview and print the respective list or report

Itinerary

This is a day by day listing of all services that make up the tour (providing the Group's/Traveler's Itinerary print control has been checked and the service has not been tagged for omission back in the Package itinerary).

Quick Tour

This gives you an overview, in date order, of all operation records for a given tour.

Voucher

Click on this icon to generate a group voucher. Remember, a voucher will only print if the print control box has been checked.

Group Leader Notes

Escort Notes

Driver's Notes

These reports can be run for the respective personnel and reflect the notes as entered in Vendor, perhaps edited at the Contracted Services level, with final adjustments possible here in Ops. You will see that what appears on the Group Leader Notes is actually drawn from both the Escort and the Driver's Notes fields so if there is anything of a confidential nature, not to be shared with the Group Leader, you will want to run your Escort and Driver documents first, then edit the notes and run the report as intended for the Group Leader.

Inventory Utilization

This report reflects inventory as loaded in the related Contracted Services record, as well as what has been sold and what is still available. In addition, you can see at a glance how many Packages are sharing the particular Contracted Services record (column labeled “#Pkgs”), whether the service has been inventoried (the column labeled “Mngr” will show Contracted Services if there is inventory loaded back in the Contracted Services record, and “O” if inventory is turned off), the “Type” as assigned back in Contracted Services (per person, fixed or room), and the Space and Rate Status (explained under “To Do” previously). This report can be compiled by tour, by supplier, or by criteria of your choice.

A/P Report US\$

This report shows the total cost (based on current reservations), payments made and balance due to each Vendor, **converting if necessary, any foreign currency amounts to US dollars.**

Vendor Usage Report

This report is somewhat similar to the Utilization Report but shows only usage, not inventoried numbers or availability. Figures reflecting cost, payments and balance due are also represented. As implied by the name, this report is intended to be run by Vendor but can be called by tour, or by other criteria of your choice. Note, however, if it's not run by Vendor, the summary totals don't necessarily make sense.

A/P Report Native

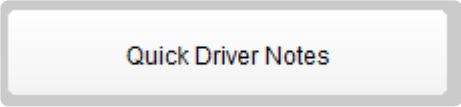
This report reflects the same, however, in the case of vendors paid in foreign currency, you will see what rate of exchange was in effect when the Ops record was created (the “Base X”, what was used in the course of costing the Package), as well as the rate used when payments were made (the Adj X).

Passenger Rooming List

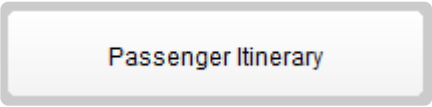
Use this report to run a list of passengers using the service(s) represented in your found set of records. If the Vendor is a hotel, the report will present as a rooming list. If not, the report will be a simple name list.

Disbursement Report

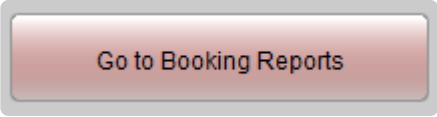
This report can be called based on a variety of criteria and reflects payments made, sorted by tour. The currency in which the Vendor was paid is visible, but there is no translation of the amount into USD.

A rectangular button with a light gray background and a thin gray border. The text "Quick Driver Notes" is centered in a dark gray font.

This report is an abbreviated version of Driver's Notes.

A rectangular button with a light gray background and a thin gray border. The text "Passenger Itinerary" is centered in a dark gray font.

Information on this report will be added soon.

A rectangular button with a reddish-pink gradient background and a thin gray border. The text "Go to Booking Reports" is centered in a dark gray font.

Use this button to navigate directly to the Booking Reports menu.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 29, 2023

Chapter 8: Money

The Money Module – Your Transactions In & Out

There are many types of transactions in TourTools, but 4 primary types: Bookings Payments In, Bookings Refunds, Vendor Payments Out, and Vendor Credits.



The Money Module is new in TourTools v5. What used to be “under the hood” and primarily accessible via reporting is now presented in a more straight-forward fashion for Owners and Managers to examine financial transactions that come out of the Bookings and Operations Modules.

Last modified: March 27, 2023

Money Module – List View

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

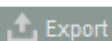
The screenshot shows the Money Module List View. At the top is a navigation bar with icons for Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. Below this is a toolbar with buttons for Export, Find, Reports, and New Window. The main area is titled "Transactions" and shows a "Found Count: 32". Below the title is a "QUICKFIND FILTER" section with fields for Date From, Date To, Client, Select Transaction Type, Description, and Tour Code. There are also fields for Amount From, Amount To, and radio buttons for Paid and Received. A "Clear Filters" button is on the right. Below the filters is a table of transactions with columns for Date, Client/Vendor, Transaction Description, Tour Code, Amount In, Amount Out, and Select?. The table shows several transactions, including "Outside Cabin Deposit" and "Outside Cabin Refund Rec'd" for Lynne's Cruise Company, and "Check" for Fred Flintstone and Joseph Fitzgerald.

Date	Client/Vendor	Transaction Description	Tour Code	Amount In	Amount Out	Select?
08/21/22	Lynne's Cruise Company	Outside Cabin Deposit	CRU08282023		\$7,250.00	
08/24/22	Lynne's Cruise Company	Outside Cabin Refund Rec'd	CRU08282023	\$500.00		
08/24/22	Lynne's Cruise Company	Outside Cabin Deposit	CRU08282023	\$4,500.00		
08/24/22	Lynne's Cruise Company	Outside Cabin Refund Rec'd	CRU08282023	\$500.00		
09/01/22	Fred Flintstone	Check	EXPGR06252023	\$300.00		
09/07/22	Joseph Fitzgerald	Check	EXPGR06252023	\$300.00		

Feature Buttons

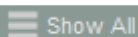
In the thin green/gray button bar we call the Feature Bar (just below the Module Navigation bar) at the top of this screen, you will find access to various scripted functionality related to the list.

Export



Use this button to export the records in your “found set” to an Excel spreadsheet. Note that only the fields of data shown on the “List View” layout will be included in the export.

Show All



Eliminates any filters you have on your list and shows all Transactions. This button only shows when you are in a found set and NOT viewing all records.

Find



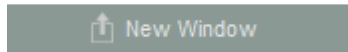
You can search for one or a group of record(s) by clicking on the “Find” button and entering search criteria in fields on the current screen and then clicking the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

Reports



Clicking this button will bring you to the Money Reports tab.

New Window



Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Money Module – Detail View

This section of the User Guide is still undergoing updates. Thanks for your patience!

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Transaction.

TRANSACTION INFO: Lynne's Cruise Company - \$7250 - 8/21/2022
 CRU08282023 - Outside Cabin

Select/View Transaction

- 8/21/2022 - Lynne's Cruise Company - Deposit Outside Cabin CC CRU08282023 -\$7250
- 8/24/2022 - Lynne's Cruise Company - Refund Rec'd Outside Cabin Check CRU08282023 -\$500
- 8/24/2022 - Lynne's Cruise Company - Deposit Outside Cabin CC CRU08282023 -\$4500
- 8/24/2022 - Lynne's Cruise Company - Refund Rec'd Outside Cabin Check CRU08282023 -\$500
- 9/7/2022 - Joseph Fitzgerald - Check EXPGR06252023 \$300
- 9/12/2022 - XYZ Charter Company - Deposit 55-Seat Motorcoach CC DCPERF10282023 -\$200
- 11/8/2022 - Mike Alexander - Tour Payment Credit Card HLALE1023 \$0
- 11/8/2022 - Mike \$0

TRANSACTION DETAILS (PAYMENT)

Disbursement # 22295 Vendor (4705) Lynne's Cruise Company

Tour (18578 - CRU08282023)

8/30/2023 Bahamas Cruise

Amount Paid \$7,250.00

Currency USD

Exchange Rate 1

Description Of Service Outside Cabin

Paid Date 8/21/2022

Payment Method CC

Check# / Card Used AMEX 1234

Expense Account Label Tour

Res Agent LS

NOTES

Compose a new note here, then click the [+ Note] button.

12/28/2022 Developer: Alex called, the check was never received; verified mailing date was 8/22

Feature Buttons



List View

Use this button to return to the Transactions List View.

< Bookings

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Bookings module and show the Booking related to this Transaction, if any.

< Clients

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Clients module show the Client related to this Transaction, if any.

< Vendors

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to

the Vendor module and show the Vendor related to this Transaction, if any.

◀ Operations

🔍 Find

📄 New Window

< Operations

All buttons with a left pointing triangle will take you to related records. In this case, use this button to jump to the Operations module and show Ops record related to this Transaction, if any.

Find

You can search for one or a group of record(s) by clicking on the “Find” button and entering search criteria in fields on the current screen and then clicking the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Transaction Details Layout

TRANSACTION INFO: Lynne's Cruise Company - \$7250 - 8/21/2022		CRU08282023 - Outside Cabin	
Select/View Transaction 8/21/2022 - Lynne's Cruise Company - Deposit Outside Cabin CC - \$7250 8/24/2022 - Lynne's Cruise Company - Refund Rec'd Outside Cabin Check - \$500 8/24/2022 - Lynne's Cruise Company - Deposit Outside Cabin CC - \$4500 8/24/2022 - Lynne's Cruise Company - Refund Rec'd Outside Cabin Check - \$500 9/7/2022 - Joseph Fitzgerald - Check - \$300 9/12/2022 - XYZ Charter Company - Deposit 55-Seat Motorcoach CC - \$200 11/8/2022 - Mike Alexander - Tour Payment Credit Card - \$0 11/8/2022 - Mike - \$0	TRANSACTION DETAILS (PAYMENT) Disbursement # 22295 Vendor (4705) Lynne's Cruise Company Tour (18578 - CRU08282023) Amount Paid \$7,250.00 Currency USD Exchange Rate 1 8/30/2023 Bahamas Cruise Description Of Service Outside Cabin Paid Date 8/21/2022 Payment Method CC Check# / Card Used AMEX 1234 Expense Account Label Tour Res Agent LS		
NOTES Compose a new note here, then click the [+ Note] button. 12/28/2022 Developer: Alex called, the check was never received; verified mailing date was 8/22			

To keep things simple, we're going to address first of all the information seen on the top half of the Transaction record. After that, we'll go tab by tab through the bottom section.

Most of the fields are obvious as to the content based on the field labels. This module is being optimized and the Tabs/Buttons will be changing. Once the enhancements are completed, corresponding details will be added.

The Main / Notes Tab

This is the tab where you will find primary details related to the transaction.

The Credit Card Transaction Details Tab

If the transaction is made by credit card, more related details can be found on this tab.

The Check/eCheck Transaction Details Tab

If the transaction is made by check or e-check, more related details can be found on this tab.

The QuickBooks Details Tab

Details related to your QuickBooks integration are located on this tab.

The Reports Tab

You will find several financial reports on this tab.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Money Reports & Docs

This section of the User Guide is still undergoing updates. Thanks for your patience!

LISTS & REPORTS

(Stored in Pay Report History)

Daily Cash Report

(Not Stored in Pay Report History)

Cash Report

Credit Card Report

Click on any of these buttons to preview and print the respective list or report

Daily Cash Report

Cash Report

Credit Card Report

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

QuickBooks

For details on QuickBooks in TourTools – See the [QuickBooks Module](#) Section in Chapter 10.



Last modified: March 27, 2023

Chapter 9: Tasks

The Tasks Module – Streamlined Task Management

*The Task module is a powerful tool that is integrated with every other module in TourTools. Create task reminders from within Client, Tours, Bookings, Operations – they will all come find you on the Dashboard when the **Action Date** arrives; there are also some instances when TourTools will automatically create Tasks for you.*



When you sign in to TourTools, a list of Tasks assigned to you that fall within the date range specified will appear on your Dashboard.

About the color coding system for the Dashboard: Tasks more than a week out will be have no color highlighting; those Tasks that fall with “this week” will be **green**, those due today will be **yellow**, and deadlines that have passed will be highlighted in **pink**.

As you deal with each Task, mark it as completed by checking the “Completed” box on the dashboard or entering today’s date in the “Date Completed” field from the Task Detail View (click the up-arrow button to the left of any Task). In the Detail View, use the **Task Notes** field to make any further remarks. Any records that do not have to be kept once completed can be deleted by clicking on the trash can button in the bottom right corner or to the right on the task list.

Last modified: March 27,

Tasks Module – List View

All primary modules in TourTools have a List View. In this view, you can filter and sort and analyze in numerous ways to get a collective view of data relating to multiple records at once.

Clicking on the up-arrow button to the far left of a Task, allows a view of the detail related to the Task. If it was created in Client, you will see which Client; if it is related to a hotel, you will see which hotel (Vendor).

All List Views in Primary Modules have a QuickFind Filter at the top that allows you to quickly filter the list based on one or more criteria; enter what you are looking for, then click on the magnifying glass button at the far right (or hit the ENTER key on your keyboard) to filter the list. Click on the **Show All** button in the green Feature Button Bar to once again show all records. Click on “Clear Filters” to quickly remove any previously entered criteria from the filter fields.

Task List								
Found Count: 8								
<div> <div>QUICKFIND FILTER</div> <div> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> </div> <div>Clear Filters</div> <div>Q</div> </div>								
Assigned To	Action Date	Task	Date Completed	Details	Module	Status	Done!	
Arin Preston	08/16/22	Call Friday		Mike Alexander	Client	Status: Past Due	<input type="checkbox"/>	
Arin Preston	08/23/22	Send payment reminder		HLE1023 Arin Preston	Bookings	Status: Past Due	<input type="checkbox"/>	
Lynne Stolk	09/08/22	Call in room counts		JW Marriott Hotel - EXPGR06252023	Ops	Status: Past Due	<input type="checkbox"/>	
Lynne Stolk	09/13/22	Send preliminary itinerary		XYZ Charter Company - DCPERF10282023	Ops	Status: Past Due	<input type="checkbox"/>	
Arin Preston	11/22/22	Send first payment reminder notice		DCPERF10282023	Tours	Status: Due Within 7 Days	<input type="checkbox"/>	

Feature Buttons



Export Tasks

Use this button to export tasks details to an Excel spreadsheet.

+ Task

Use this button to begin the process of adding a new Task.

This button, from within the Task Module, allows creation of a record that is “generic”, in other words not directly related to any record in your system. A good example might be something to remind you to check rates at a hotel that you’ve never used, and as such is not yet represented in your Vendor records.

In all primary modules you will see a tab labeled Tasks/Docs, within this tab, go to the Tasks tab and click the button labeled “+ Task”. Adding tasks from within a record in one of these modules allows creation of a task **related** to that particular Client, Vendor, Tour, etc.

Find My Open Tasks

Use this button to filter the list to only show all open tasks assigned to you.



Find

You can search for one or a group of record(s) by clicking on the “Find” button and entering search criteria in fields on the current screen and then clicking the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

Reports

Use this button to navigate to the Tasks Reports & Docs tab. Learn more about this tab and available reports in the [Task Reports & Docs topic](#).

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Tasks Module – Detail View

All primary modules in TourTools have a Detail View. In this view, you can view all of the details related to a particular Task.

The screenshot shows the 'Task Details' window for the task 'Call theatre with final counts'. The window is divided into several sections:

- Header:** Includes navigation buttons (List View, Find, New Window), a search bar, and a 'Record ID' of 104106.
- Task Info:** Displays the task name 'Call theatre with final counts' and its status 'Past Due'.
- Select/View Task:** A list of tasks on the left side, including 'Test from bookings - 12/18/2022 ARIN PRESTON', 'Test from client - 12/18/2022 ARIN PRESTON', 'Test from tours - 12/18/2022 ARIN PRESTON', 'Test from vendor - 12/22/2022 ARIN PRESTON', 'Call theatre with final counts - 12/18/2022 ARIN PRESTON' (selected), '160 Day Account Manager First Payment Reminder - 12/28/2022 ARIN PRESTON', and '160 Day Account Manager First Payment Reminder - 12/28/2022 ARIN PRESTON DEVELOPER MARCIE VARGO'.
- Main / Task:**
 - Task Description:** A text box containing 'Call theatre with final counts'.
 - Date Due:** 12/18/22.
 - Time Due:** (empty).
 - Fudge Factor:** (empty).
 - Action Date:** 12/18/22.
 - Date Completed:** (empty).
 - Task Notes:** A large text area for notes.
 - Assigned To:** A list of users with checkboxes: Arin Preston (checked), Developer, Lynne Stolk, Marcie Vargo, and Tammie Williams.
- Reports:** A 'Go Ops' button.
- TOUR/BOOKING INFORMATION:**
 - Tour Code:** EXPGR06252023
 - Tour #:** 18575
 - Booking #:** (empty)
 - Tour Name:** Explore Grand Rapids
 - Tour Begins On:** (empty)
 - Tour Ends On:** (empty)
- CLIENT INFORMATION:**
 - Contact Name:** (empty)
 - Client ID #:** (empty)
 - Business/School/Group Name:** (empty)
- VENDOR/OPS INFORMATION:**
 - Vendor Name:** Sight and Sound Theatres
 - Primary Contact:** Arin Preston arin@datavast.net
 - Vend ID #:** 4703
 - Ops Description:** Three Course Dinner including Gratuity
 - Service Begins On:** 6/27/2023
 - Service Ends On:** 6/27/2023
 - Ops ID #:** 83756
- TASK SOURCE:**
 - Module:** Ops
 - Created By:** Developer

Feature Buttons

List View

Use this button to return to the Task List View.

Find

You can search for one or a group of record(s) by clicking on the “Find” button and entering search criteria in fields on the current screen and then clicking the **Submit** button. Click the **Stop** button to abort the find process and return to your previous found set.

New Window

Clicking on the New Window allows you to open other modules within a new window so you can view 2 or 3 at the same time – this is especially helpful if you have more than one display.

Exploring the Task Details Layout

Main / Task Tab

Most of the fields are obvious as to the content.

In the upper right corner, there are fields where you can input the time of day you need to take action, by example, make a phone call to a teacher who is only available during a break. Entering a date in the **Date Completed** field is the same as checking the **DONE!** checkbox for a task on the Dashboard.

The “Fudge Factor” is where you can log the number of days prior to the hard deadline that you want the task to start showing up. This will be used frequently when it comes to reminders created for payments due, as you don’t want to be reminded on the day; rather, you usually want some lead time to request a check from the bookkeeper or make arrangements to process the payment.

The details in the shaded section to the right is not for entry – it displays other system information related to this task.

Reports Tab

Learn more about this tab and available reports in the [Task Reports & Docs topic](#).

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Adding New Tasks

Add New Task

Task Description

Call Jason about the marketing campaign.

Due Date

Sat, Dec 10, 2022

Fudge Factor

5

days

Assignees

- ☒ Arin Preston
- ☐ Developer
- ☐ Lynne Stolk
- ☐ Marcie Vargo
- ☐ Tammie Williams

Stop

Submit

To create a new general Task from the Dashboard, click on the button labeled **+ Add Task**, which will open a window similar to the one shown here. Fill in the “what”, the date on or by which the Task needs to be completed, and possibly a **Fudge Factor**. Applying a Fudge Factor will give you a “heads up” in advance of the actual due date in cases where meeting the deadline is absolutely critical. If the due date is December 10th and the **Fudge Factor** is 5 days, the **Action Date** will be December 5th and that is the date that will be used to push the reminder to your Dashboard.

Most Tasks will be created within a specific module and be related to a certain Tour, Booking, Vendor, or Client. Each of these modules has a specific tab dedicated to Tasks. From the **Tasks** tab, click on the **+ Task** button.

Let’s look at an Operations Task. Operations records are associated with Vendor Contracted Services for a specific Tour.

Example

You are holding a block of rooms at the JW Marriott Hotel for five nights, beginning June 25th. The first

deposit is due two months prior, on April 25th. Entering a “Fudge Factor” of 7 days means the reminder will start to appear a week prior to the critical June deadline.

Once you’ve created the Task in Operations, on the **Tasks / Docs** tab, open it up (by clicking on the up-arrow button the the left of it) to review and possibly add to it. The record will be tagged with your name but can be assigned to someone else by simply clicking in the **Assignees** field. If the record was created as a payment reminder, enter the amount due in the field so labeled if appropriate. If any additional notes are required, there is a place to record those as well.

Note that if the task is associated with a Vendor, you will see the Vendor, the Ops, the Tour, etc., referenced. If it has to do with a Booking, the Client and Tour may be referenced, and so on.

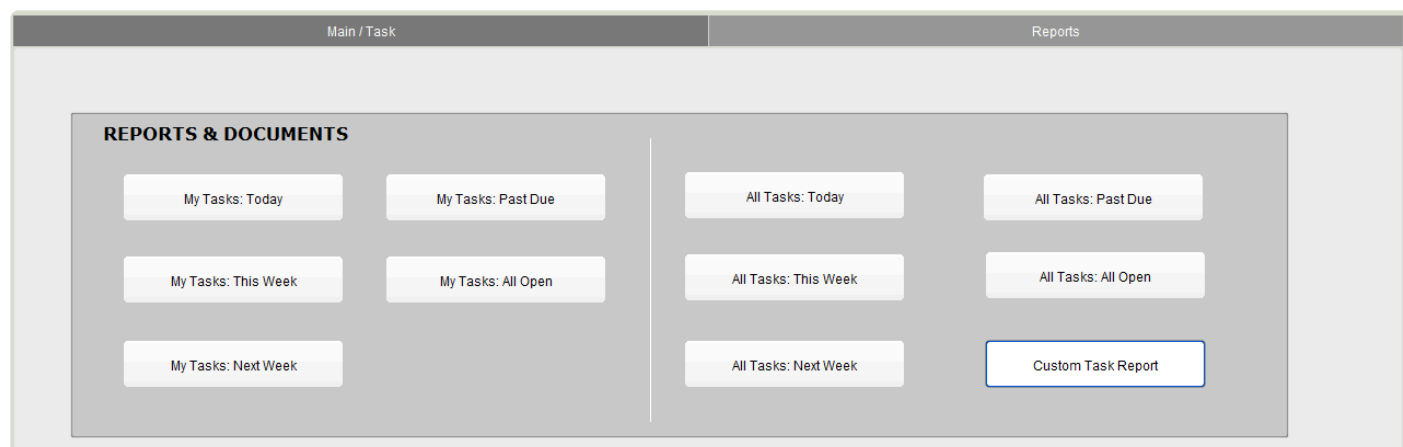
As you deal with each Task, mark it as completed by checking the “Completed” box on the dashboard or entering today’s date in the “Date Completed” field from the Task Detail View (click the up-arrow button to the left of any Task). In the Detail View, use the **Task Notes** field to make any further remarks. Any records that do not have to be kept once completed can be deleted by clicking on the trash can button in the bottom right corner or to the right on the task list.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Task Reports & Docs

Click on **Task Reports** tab (see image below) to see several reporting options:



My Tasks: Today

My Tasks: Today If you select this report, the system does the “find” for you, acting on your name and today’s date. Any Tasks assigned to you that have not been marked as completed will be included on the report. If there are no items assigned for today’s date, you will see *all* Tasks in a list view format.

My Tasks: This Week

My Tasks: This Week This report will reflect all Tasks, assigned to me, for action within the next 7 days.

My Tasks: Next Week

My Tasks: Next Week This report will reflect all Tasks, assigned to me, for action 7-14 days from today.

My Tasks: Past Due

My Tasks: Past Due This report will reflect all Tasks, assigned to me, for action that are past due.

My Tasks: All Open

My Tasks: All Open To look at all Tasks in the system, assigned to me that have not been marked as completed, use this report.

All Tasks: Today

All Tasks: Today If you select this report, the system does the “find” for you, based on today’s date. Any Tasks that have not been marked as completed will be included on the report. If there are no items assigned for today’s date, you will see *all* Tasks in a list view format.

All Tasks: This Week

All Tasks: This Week This report will reflect all Tasks, assigned to anyone, for action within the next 7 days.

All Tasks: Next Week

All Tasks: Next Week This report will reflect all Tasks, assigned to anyone, for action 7-14 days from today.

All Tasks: Past Due

All Tasks: Past Due This report will reflect all Tasks, assigned to anyone, for action that are past due.

All Tasks: All Open

All Tasks: All Open If you want a look at all Tasks in the system that have not been marked as completed, use this report.

Custom Task Report

Custom Task Report When you make this selection, the Task layout will appear as a “find” prompt. If you want to see all tasks for the week of August 10, 2022, by example, your entry in the Date Due field would be “8/10...8/17” (if you don’t specify the year, it will assume you mean the current year). You might otherwise want to find all the activities assigned to one staff member by picking that name from the list. If you choose to not enter any criteria and simply click **Continue**, a list including all Tasks for all staff will compile.

Note: Upon calling any of these reports, you will be asked if you want to include or not any Tasks that are completed. Typically, your response would be “No” as you’re generally only interested in what still needs to be done, not what has already been taken care of...but the choice is there.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Chapter 10: Options

Optional Functionality to Enhance your TourTools v5 Back Office System



The TourTools team has developed specialized functionality that can be added on to the TourTools Back Office system for customers that want to use popular 3rd party software with TourTools. These features are not included by default as not all clients require them.

Our most popular enhancement is TourTools Online – it allows travelers and group leaders to make tour bookings & payments directly from your website and then pushes the data down into your TourTools back office software, saving your staff a great deal of time and energy.

Last modified: March 27, 2023

TourTools Online

TourTools Online – Take Bookings & Payments from Your Website

Tour Tools allows you to sell your product online, based on input you enter into the Tour Tools application. It is customizable based on your tour's unique features. It allows your customers to browse both public or private tours, make online bookings, and make online payments.



<https://player.vimeo.com/video/794241937>

Last modified: February 15, 2023

Managing TourTools Online in FileMaker

The section of the chapter demonstrates how the TourTools Online (TTO) website communicates with the TourTools Back Office FileMaker application.

You cannot have TourTools Online (TTO) independently of TourTools Back Office – TTO is an enhancement to the back office FileMaker application and the two are tightly connected and share data in real-time.



The sections reviews the areas of the TourTools Back Office system that impact what is displayed and available on your website via TourTools Online.

Last modified: March 27, 2023

Client Details

When a traveler creates a new account on your website, in TourTools Online, it shows up as a new Client record in the Clients module of TourTools Back Office – along with all of the address and contact information provided at time of account creation.

Client Details Record ID 150494

CLIENT INFO: Fred Flintstone

Select/View Client

- Fred Flintstone
- Wilma Flintstone
- Mike Alexander
- Arin Preston
- Lynne Stolk - Lynne's Happy Campers
- Joseph Fitzgerald
- Josephine Fitzgerald
- Marquita Stephens - Minneapolis Urban League
- Arin Preston
- Susan Smith - Creston High School

Active x

Primary Contact ★

DETAILS ↶

Form Fields:

- Title: [] First Name: Fred Last Name: Flintstone Business/School/Group: [] Business Title: []
- Primary Email Address: fred@bedrockmail.com Preferred Contact Method: Email Mailing Address: Home (selected), Business, Don't Mail
- Home #: [] Cell #: []
- Work #: [] Primary #: []
- Home Address: 1234 Stoney Brook Grand Rapids MI 49512
- Client Categories: Group Leader, Decision Maker, Individual Traveler (selected), Other, Payer, Tour Operator

RELATED CLIENTS + Add Related

CRITICAL NOTES

Important notes that should be visible at all times.

First Traveled: 2023 Last Traveled: 2023

NOTES + General Note + Call + Email + Fax + Letter + Meeting

Compose a new note here, then click the applicable button above. The GENERAL button adds a general note to the client record (below), the specific buttons will add your note below and also add an entry to the activity log to the right.

ACTIVITY LOG

- 09/01/22 Booking
- 08/11/22 Email sent by Lynne Stolk



If an existing Client wants to book a Tour online, they already have an account and should not create a new account on your website – this will create a duplicate record in your Client module, which can be problematic.

To look up or reset the account password for any Client, Click on the DETAILS button and navigate to the Web tab.

Client Details

Fred Flintstone

Active x

Primary Contact ★

DETAILS ↶

Contact Details for Fred Flintstone

Tabs: Contact, Addresses, Personal Details, Business / School / Group, Emergency, Passport/Visa, Performance, Loyalty Programs, Web

Web Tab:

Username (Email): fred@bedrockmail.com

Password (Click to reset): []

Note: Passwords are encrypted. Lost passwords cannot be recovered, only reset.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Tour Details

Starting in the **Tours Module**, there is a dedicated **TourTools Online** tab that allows users to manage & publish information related to the Tour. On this tab, you will find 5 sub-tabs as described below.

TOUR INFO: Mike Alexander 10-Day Holy Land Tour HLALE1023

Record 2 of 6

Select/View Tour

- EXPGR06252023 - Explore Grand Rapids ACTIVE
- HLALE1023 - Mike Alexander 10-Day Holy Land Tour ACTIVE
- CRU08282023 - Bahamas Cruise ACTIVE
- PROPOSAL - Fred Explores Grand Rapids PROPOSAL
- PROPMIKE - Mike Explores Grand Rapids PROPOSAL
- DCPERF10282023 - DC Performance Tour ACTIVE

Tour Details Form:

Tour Code	Name	Start Date	Days	End Date	Nights	Tour Status	Res Status
HLALE1023	Mike Alexander 10-Day Holy Land Tour	10/12/23	10	10/21/23	8	Active	Avail
Tour Type	Destination	Closed	Tour #	Load Factor	Trip Type	Default Bus Size	
Historical Tours	Arkansas		18577	3.8%	MultiDay	47	
Guaranteed							
Yes No							

TourTools Online

Tour Information | Docs for Download | Instructions & Confirmation Text | Groups | Publishing | Options & Settings

Tour Image

Tour Name
Mike Alexander 10-Day Holy Land Tour

Tour Description
Our most popular, Christian tour to Israel for the last 10 years, the Roots of Your Faith tour allows you to experience your faith on a unique and eye-opening tour to the Holy Land. Bringing biblical stories to life, this tour guides its travelers through the Holy Land using the Bible as a road map to spiritual discovery. Globe Tours incorporates modern Israel with some of the most moving and prominent historical and biblical sites, offering a truly unique and unforgettable experience. From Caesarea to Nazareth to the Sea of Galilee, the Dead Sea and Jerusalem, Globe Tours will lead you on an enlightening, biblical journey through Israel, breathing life into some of the most meaningful locations and stories in the Christian faith.

Features List
List of "features" for this tour (one per line)

Our tour includes a full-day itinerary!
Most tour companies tour half-day only.
All entrance fees are included.
Enjoy the sightseeing and don't worry about buying tickets or hidden fees.
Enjoy a luxurious stay at our 5-star hotels.
Everyone stays at the same hotel, which means more time for touring!
Our tour includes daily breakfast and dinner.
Enjoy the most delicious and fresh local cuisine.
This tour is led by a government licensed tour guide, expert in Biblical and historical sites.
Walk where Jesus walked, our tour is life-changing and affordable.

Tour Image Requirements:
Max width: 768px
Width/height ratio: 3:4
The optimal format depends on the image.
Photos generally perform better as JPEGs;
Graphics or images with few colors perform better as indexed PNGs or GIFs.

CURRENT FOUND SET

The TOUR INFORMATION Tab

This tab allows you to manage (see image above) information to be displayed on your website's tour page. This includes a tour description, a tour image, and special features of the tour.

The DOCS FOR DOWNLOAD Tab

You can attach catalogs or brochures using this tab. Users can then download to view print or view offline.

TourTools Online

Docs for Download | Tour Information | Instructions & Confirmation Text | Groups | Publishing | Options & Settings

Manage Tour Documents
Upload and attach documents to make them available to your travelers for download from the Tour Details page.

Name of Document: Brochure.pdf

Type: Brochure

Upload/Attach

Brochure.pdf

The INSTRUCTIONS & CONFIRMATION TEXT Tab

This tab allows you to control the verbiage that displays in certain areas of TourTools Online – in the Booking Notes section as well as right above the invoice.

TourTools Online

Tour Information	Docs for Download	Instructions & Confirmation Text	Groups	Publishing	Options & Settings
Traveler Instructions & Booking Notes Enter text below to be displayed above the Booking Notes field. You can provide general booking instructions and state what kinds of details the traveler can/should enter in the Booking Notes field. <div style="border: 1px solid #ccc; height: 60px; margin-top: 5px;"></div>					
Invoice Comments Enter text below to be displayed just above the invoice (will also print on invoice). <div style="border: 1px solid #ccc; height: 60px; margin-top: 5px;"></div>					

The GROUPS Tab

This tab allows you to set up Web Codes to use for private tours and/or to segregate bookings for a tour that has multiple group leaders.

TourTools Online

Tour Information	Docs for Download	Instructions & Confirmation Text	Groups	Publishing	Options & Settings																				
Group Settings Set up Web Codes to use for private tours and/or to segregate bookings for a tour that has multiple group leaders. <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th>Group Name</th> <th>Group Leader</th> <th>Webcode</th> <th>Group Details</th> </tr> </thead> <tbody> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>						Group Name	Group Leader	Webcode	Group Details																
Group Name	Group Leader	Webcode	Group Details																						

The PUBLISHING Tab

This tab controls how tours are displayed on the website. You can select if a tour is available publicly or not. Unchecking “Publish Tour to Website” and refreshing web page, will show how the tour has been removed from the list. Publishing a tour is as easy as checking a button. This does not apply to group tours which require usernames and/or passwords to access.

TourTools Online

Tour Information	Docs for Download	Instructions & Confirmation Text	Groups	Publishing	Options & Settings																														
Publish Tour to Website <input type="checkbox"/> This controls whether the Tour can be viewed publicly on the website (does not apply to group tours which require usernames and/or passwords to access).																																			
Publish Packages to Website This controls which Packages can be viewed on the website, for both public and group tours. <table border="1" style="width: 100%; margin-top: 10px;"> <thead> <tr> <th></th> <th></th> <th></th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td>Mike Alexander 10-Day Holy Land Tour 5-1</td> <td>Oct 12, 2023</td> <td>Oct 21, 2023</td> <td>Published</td> </tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> <tr><td> </td><td> </td><td> </td><td> </td><td> </td></tr> </tbody> </table>											<input checked="" type="checkbox"/>	Mike Alexander 10-Day Holy Land Tour 5-1	Oct 12, 2023	Oct 21, 2023	Published																				
<input checked="" type="checkbox"/>	Mike Alexander 10-Day Holy Land Tour 5-1	Oct 12, 2023	Oct 21, 2023	Published																															

Publish Tour to Website

If the box is checked, the tour is published on your website and available for booking. When the box is unchecked, the tour is no longer published on your website.

Publish Packages to Website

You may have one or more internal packages that you do not want displayed on the website. Packages can be removed if sold out or running low on availability.

The OPTIONS & SETTINGS Tab

This tab allows you to toggle certain TourTools Online options and settings for the tour. More details on what each setting controls to be added soon.

WEB PUBLISHING

Tour Information Docs for Download Instructions & Confirmation Text Groups Publishing TourTools Online Options

TourTools Online Optional Settings

The following features have options that can be managed from this section and instantly implemented on the web in TourTools Online. The default setting is specified in parentheses.

<p>PAYMENTS</p> <p><input type="checkbox"/> Skip Initial Online Payment (off)</p> <p><input checked="" type="checkbox"/> Show American Express (on)</p> <p><input checked="" type="checkbox"/> Show PayPal (on)</p> <p><input type="checkbox"/> Discount Codes (off)</p> <p><input checked="" type="checkbox"/> Allow Other Payment Amounts (on)</p> <p><input type="checkbox"/> Allow Payments After Cancellation (off)</p> <p><input type="checkbox"/> Allow Payments on WL Bookings (off)</p> <p><input type="checkbox"/> Allow Any Payment Amount (off)</p> <p>INSURANCE</p> <p><input checked="" type="checkbox"/> Enable Insurance (on)</p> <p><input type="checkbox"/> Allow Multiple Insurance Packages (off)</p> <p><input checked="" type="checkbox"/> Include Premium in 1st Deposit (on)</p> <p><input type="checkbox"/> Use Package Based Insurance (off)</p> <p><input checked="" type="checkbox"/> Use Policy Based Insurance (on)</p>	<p>BOOKINGS</p> <p><input checked="" type="checkbox"/> Allow Multiple Passengers (on)</p> <p><input type="checkbox"/> Hide Roommate Field (off)</p> <p><input checked="" type="checkbox"/> Set First Pax Name to User Name (on)</p> <p><input type="checkbox"/> Use Policy Text Fields (off)</p> <p><input type="checkbox"/> Hide Login Button (off)</p> <p><input type="checkbox"/> Hide Allergy & Diet Restrict Fields (off)</p> <p><input type="checkbox"/> Allow Waitlisted Bookings (off)</p>	<p>GROUPS</p> <p><input checked="" type="checkbox"/> GL Reports Show Rooming List (on)</p> <p><input checked="" type="checkbox"/> Allow GL to View Member Bookings (on)</p> <p><input type="checkbox"/> Allow GL to Edit Rooming List (off)</p> <p>TOURS</p> <p><input type="checkbox"/> Skip View Tour (off)</p> <p>USERS</p> <p><input type="checkbox"/> Display Past Bookings (off)</p> <p><input type="checkbox"/> Hide Cxld Bookings (off)</p>	<p>INVOICES</p> <p><input checked="" type="checkbox"/> Show Packages (on)</p> <p><input checked="" type="checkbox"/> Show Options (on)</p> <p><input checked="" type="checkbox"/> Show Penalties (on)</p> <p><input checked="" type="checkbox"/> Show Airfare (on)</p> <p><input checked="" type="checkbox"/> Show Travel Protection (on)</p> <p><input checked="" type="checkbox"/> Show Total (on)</p> <p><input checked="" type="checkbox"/> Show Payments (on)</p> <p><input checked="" type="checkbox"/> Show Discounts (on)</p> <p><input checked="" type="checkbox"/> Show Balance Due (on)</p> <p><input checked="" type="checkbox"/> Show Balance Due Date (on)</p>
---	---	--	---

Other Primary Tabs of Note in the Tours Module

The PAY DEADLINES Tab

The Tours module contains a **Pay Deadlines tab**, where you can manage the list of deposits, deposit dates, deposit amounts, cancellation penalty dates, and cancellation amounts. If the tour is published to TourTools Online, this information is pushed out to your website and displayed when a traveler or group leader books the tour.

Last modified: March 27, 2023

Package Details

Packages Attached to Tours

Back in the Tours module, you can see packages linked to a particular tour by navigating to the **Prices / Avail** tab.

TOUR INFO: Mike Alexander 10-Day Holy Land Tour
HLALE1023

Select/View Tour

EXPGR06252023 - Explore Grand Rapids ACTIVE
HLALE1023 - Mike Alexander 10-Day Holy Land Tour ACTIVE
CRU08282023 - Bahamas Cruise ACTIVE
PROPOSAL - Fred Explores Grand Rapids PROPOSAL
PROPMIKE - Mike Explores Grand Rapids PROPOSAL
DCPERF10282023 - DC Performance Tour ACTIVE

Tour Code

HLALE1023

Name

Mike Alexander 10-Day Holy Land Tour

Start Date

10/12/23

Days

10

End Date

10/21/23

Nights

8

Tour Status

Active

Res Status

Avail

Tour Type

Historical Tours

Destination

Arkansas

Closed

Tour #

18577

Load Factor

3.8%

Trip Type

MultiDay

Guaranteed

☐ Yes ☒ No

Default Bus Size

47

Main / Notes
Prices / Avail
Pay Deadlines
Cruises
Groups
Buses
Flights
Meals
TourTools Online
Email Log
Tasks / Docs
Reports

PACKAGE / OPTION DISPLAY

Pricing Model

GRP

Package Count

1

QUICKBOOKS CONNECT INFO

QB Job #

18577

QB Job ID #

PUBLISHED PACKAGES

Description	Pric	Res	Date Begin	Date End	Inv Blk	Sold	Sts Av.	Sgl Av.	Dbl Av.
Mike Alexander 10-Day Holy Land Tour 5-1	\$2,350.00	Single	Thu 12 Oct 23	Sat 21 Oct 23		1			
Mike Alexander 10-Day Holy Land Tour 5-1	\$775.00	Double	Thu 12 Oct 23	Sat 21 Oct 23		1			

Package Prices

In the Packages module, the package prices are displayed & managed on the Pricing tab. Here you can see what occupancies have been enabled and what the selling prices have been established.

Package/Option Name
Core Package

Pkg Type
PKG

Primary?
Primary

Commission Level
None

Priced?
Status: Reprice

Published?
Published

Booked?
PAX

Published to Web?
No

Tour Name
Explore Grand Rapids

Tour #
18575

Tour Code
EXPGR06252023

Package/Option Description

Start
Sun, Jun 25, 2023

Days
6

End
Fri, Jun 30, 2023

Nights
5

Division

Main / Itinerary
Add Products/Services
Pricing
Terms & Conditions
Notes
Web
Operations
Reports

GROUP PACKAGE PRICE INFORMATION

Details

Room Types Included:

☒ Yes ☐ No

☒ Yes ☐ No

☒ Yes ☐ No

☒ Yes ☐ No

☐ Yes ☒ No

☐ Yes ☒ No

SINGLE

DOUBLE/OPT

TRIPLE

QUAD

CHILD

EXTRA BED/PER

Sell Prices:

\$750.00

\$625.00

\$583.33

\$562.50

\$0.00

\$0.00

The WEB Tab

If you have TourTools Online added to your Back Office system, this tab will provide tools for managing the itinerary as it should display online.

The Itinerary shows up on the Select Package screen when your travelers book on your website. Each Package can have it's own Itinerary, though usually Tour Operators have only used it for the Core Package(s).

Here are three main parts to the Packages Web tab:

1. Publish Package to Web*

This controls whether the Package is visible to the user on the TourTools Online (TTO) website when making a new online Booking. Checking the box will display the Package on TTO. It is primarily used to display Passenger (PAX) Core and Option Packages.

Tour Operators may want to hide certain Packages from Passengers on TTO. For instance, some Tour Operators will create separate staff Packages with discounted pricing. Usually, Tour Operators will create these Bookings manually and not want the discounted prices displayed on the TTO website.

Note: This checkbox does not affect online invoices, which will display all Packages added to the Booking for the invoice.

2. Disable Price Options*

This controls whether certain Price Options for Packages are visible to the user on TTO when making a new online Booking. Checking the box will hide the Price Option on TTO.

In particular, Student Tour Operators usually only make the Quad Price Option available on TTO and book four students to each room to minimize the cost of the trip. In cases where parents want to stay with their children and book an entire room just for their family unit, Tour Operators will manually create Bookings with the appropriate Single, Double, or Triple Price Options.

3. Day By Day Itinerary*

This will display a simple itinerary on TTO on the Select Package screen:

Day #1 — Some Title

Some description.

Day #2 — Some Title

Some description.

Since the Itinerary is manually written by the Tour Operator and is separate from the Package building process in TourTools, it is up to the Tour Operator to ensure that the Itinerary accurately represents the Package.

Terms and Conditions

In the Package module, the **Terms and Conditions tab** is where related details are set and pushed out to your website for those who book the tour to view and indicate agreement.

Package/Option Name Mike Alexander 10-Day Holy Land Tour 5-1	Pkg Type PKG	Primary? Primary	Commission Level None	Price? Status: Reprice	Published? Published	Booked? PAX	Published to Web? Yes
Tour Name Mike Alexander 10-Day Holy Land Tour	Tour # 18577	Tour Code HLALE1023	Package/Option Description 5-1 comp ratio				
Start Thu, Oct 12, 2023	Days 10	End Sat, Oct 21, 2023	Nights 8	Division			

Main / Itinerary	Add Products/Services	Pricing	Terms & Conditions	Notes	Web	Operations	Reports
------------------	-----------------------	---------	-------------------------------	-------	-----	------------	---------

TERMS & CONDITIONS FOR DOCUMENTS

Click the arrow buttons below to load the default text from Business Settings; appears on Proposals by default

► Inclusions (Itinerary Description)

Policy text

^
v

► Terms and Conditions

Conditions text

^
v

► Additional Features / Special Instructions / Options

Options text

^
v

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Bookings & Payment Details

Bookings

In the Bookings module you can see all the bookings made for the tour. The last booking made will be at the bottom.

Dashboard

Tasks

Clients

Vendors

Tours

Packages

Bookings

Operations

Money

Settings

Export

Reports & Labels

Find

New Window

Found Count: 12

Bookings List

Clear Filters

QUICKFIND FILTER

PAX / TRAVELERS

CLIENT / GL

First Name

Last Name

#PAX GL

#PAX

Status

Res Type

Invoice

Tour

Room

Tag#

TotalCost

Select?

ID

First Name

Last Name

First Name

Last Name

38603

Mike

Alexander

Mike

Alexander

1

1

Active

PAX

GL

HLALE1023

Double

1

\$775.00

08/11/22

38604

Arin

Preston

Arin

Preston

1

1

Active

PAX

PAX

HLALE1023

Single

2

\$2,350.00

08/19/22

38605

Lynne

Stolk

6

6

Active

GL

GL

CRU08282023

\$12,500.00

08/21/22

38606

Joseph

Fitzgerald

Joseph

Fitzgerald

2

2

Active

PAX

PAX

CRU08282023

Double

1

\$5,000.00

08/24/22

38607

Fred

Flintstone

Fred

Flintstone

2

2

Active

PAX

PAX

EXPGR0625202

Double

1

\$1,265.00

09/01/22

38608

Joseph

Fitzgerald

Joseph

Fitzgerald

2

2

Active

PAX

PAX

EXPGR0625202

Double

2

\$1,250.00

09/07/22

38609

Susan

Smith

2

0

Active

GL

GL

DCPERF102820

\$675.00

09/12/22

Once you open the Detail View (see below) of the booking, clicking on the arrow button to the left of the passenger name will allow you to view additional passenger details, such as dietary restrictions, allergies, and passport information, if it was collected. This is customizable.

Dashboard

Tasks

Clients

Vendors

Tours

Packages

Bookings

List View

Clients

Tours

GL Agents

Record 1 of 12

Booking Details

BOOKING / PAX INFO: Mike Alexander 10-Day Holy Land Tour

Select/View Booking

Mike Alexander 10-Day Holy Land Tour

Mike Alexander PAX/GL 1

Mike Alexander 10-Day Holy Land Tour

Arin Preston PAX/PAX 1

Bahamas Cruise

Lynne Stolk GL/GL

Bahamas Cruise

Joseph Fitzgerald PAX/PAX 2

Explore Grand Rapids

Fred Flintstone PAX/PAX 2

Explore Grand Rapids

Joseph Fitzgerald PAX/PAX 2

DC Performance Tour

Susan Smith GL/GL 1

DC Performance Tour

Susan Smith GL/GL 1

DC Performance Tour

Tommy Thompson PAX/GL 1

DC Performance Tour

Joseph Fitzgerald PAX/PAX 2

DC Performance Tour

BOOKING

DATE BOOKED: 08/11/22

CONFIRM

Room Type

Pax

Tag#

Roommate?

Roommate Name

Total Cost

Double

1

1

\$775.00

Driver(s)

Staff Singles

Account Manager

Source

Arin Preston

Staff Doubles:

Salesperson

Segment

CRUISE

Respo

Cruise Line

Ship Registry

Cabin #

Deck

Dining

TOUR

Tour Name

Tour Begins

Tour Ends

Mike Alexander 10-Day Holy Land Tour

10/12/23

10/21/23

Tour #

Tour Code

Division

18577

HLE1023

PAX

First Name

Last Name

Add/Remove ?

Nickname

Birthdate

Mike

Alexander

+

-

Tag#

Open Pax Details to Edit

Main

Notes

Prices / Options

Payments / Refunds

Fundraising

Contact Details

BOOKING NOTES

Tour Notes (Internal Use Only)

Pax Hotel No

Back to Booking
Find
New Window

Record 1 of 1

Passenger Details

Record ID 62750

PAX INFO: Mike Alexander
HLALE1023

Select/View Passenger

Mike Alexander

PASSENGER KEY INFO

Title	First Name	Middle Name	Last Name	Name on Name Tag	Nick Name	Tag #
	Mike		Alexander	Mike		1
Email Address						

TOUR / BOOKING INFO

<u>Tour Name</u>	<u>Trav Num</u>
Mike Alexander 10-Day Holy Land Tour	
<u>Tour Code</u>	<u>Reservation #</u>
HLALE1023	38603
<u>Cancel Date</u>	

Main / Passenger Details
Linked Client
Meal Selections
Fundraising Distributions
Reports

PASSENGER DETAILS

If the passenger name in this record is not from a linked Client record, load the passenger details manually on the passenger details tab below.

Height	Weight	Gender	T-Shirt Size	Medical Conditions	Mobile Phone
Birthdate	Age				Home Phone
Passport Number	Expiration Date			Current Meds	Work Phone
Place Issued	Citizenship			Allergies	
Occupation				Release Date	
Dietary Preferences					
Emergency Contact	Emergency Phone				
Physician Name	Physician Phone				

Update Health/Diet Info From Client

Payment for the Booking

Under the **Payments / Refunds** tab in the Booking module, you can see a list of the payments made for the booking. This includes the payment amount, when it was made, and how it was made.

PAYMENT OVERVIEW			Load TM Deposits			PASSENGER INVOICE		
Responsible for Payment <input type="text"/>			<u>Next Payment</u> Final Payment			<u>Next Amt Due</u> \$997.00		
<u>Cash or Check</u> \$600.00			<u>Next Due Date</u> 01/26/12			Packages \$1,898.00		
<u>Credit Card</u> \$301.00			<u>Final Amount Due</u> \$997.00			Options _____		
<u>Fund Raising</u> Refunds			<u>Final Due Date</u> 01/26/12			Penalties _____		
<u>Discounts</u> \$0.00			<u>Final Due?</u> Yes			Airfare \$0.00		
<u>Transfers</u> \$0.00			<u>Amount Due Date</u> <input type="text"/>			Donation \$0.00		
<u>CC Pass</u> \$0.00			<u>Due?</u> <input type="text"/>			Total Insurance _____		
Block Pmt Remind? <input type="text"/>			Block Late Pmt Remind? <input type="text"/>			Insur Retained _____		
						Total \$1,898.00		
						Discounts \$0.00		
						Adjusted Total \$1,898.00		
						Payments \$901.00		
						Refunds _____		
						Balance Due \$997.00		
						Date Due Jan 26, 2012		
						Refund Due \$0.00		

PAYMENT INFORMATION		
<input type="button" value="Insurance"/> <input type="button" value="Accept All"/> <input type="button" value="Decline All"/>		
Insurance Premium _____ Next Pay + Premium _____		
<input type="button" value="New Payment/Discount"/> <input type="button" value="New CC or Scheduled Payment"/> <input type="button" value="New eCheck/ACH Payment"/>		
Type of Payment	Payment Date	Amount Paid
Check	11/8/2011	\$600.00
Card # _____ Exp MM/YY _____ <input type="button" value="+ New"/> <input type="button" value="X Void"/> <input type="button" value="P Credit"/>		
Credit Card	3/2/2012	\$301.00
Card # _____ Exp MM/YY _____ <input type="button" value="+ New"/> <input type="button" value="X Void"/> <input type="button" value="P Credit"/>		

Transaction Details

More details are available if you open the transaction details using the arrow button to the left of the payment, including the last four digits of the credit card used, the expiration date, billing address, and more. A transaction ID from the payment gateway is stored with each payment, to be used for crediting or for making additional transactions.

Main / Notes	Credit Card Transaction Details	Check Transaction Details	A/R Details from Bookings	A/P Details from Ops	QuickBooks Details	Reports
<h2>PRIMARY TRANSACTION DETAILS</h2>						
Pay Serial #	Valid	Transaction Amount				
19697	Yes	563				
Tour Code		Trans Date				
GCO080218-1		4/4/2018				
Tour #		Trans Description				
11020		Web Payment				
Tour Date Begin	Fundraising?	Trans# Ref				
8/2/2018	<input type="checkbox"/> Yes	22251				
Trans Type	ResAgent	Transaction Label				
Credit Card	WWW	Credit Card				
Trans #	Division					
22251						
Adj Trans #	Division Link					
	11020					
<h2>NOTES</h2>						
Compose a new note here, then click the [+ Note] button.						
<input type="button" value="+ Note"/>						

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Global TTO Settings

Clicking on the large Module Navigation button labeled “Settings” at the top right of the screen allows access to various settings for the TourTools system.



Click on **Business Settings**, there settings are available to Owners and Managers only and this is where you will find the global TourTools Online settings.

The **TourTools Online tab** allows you to manage certain settings and default text for TourTools Online, if you have it as an add-on to your back office system.

Business Settings

Company / Divisions Staff Members System Modules eBlast Templates DB Announcements Guides Insurance Tables TourTools Event Log **TourTools Online** Email & Task Automation

TourTools Online Options & Settings

The following options can be managed from here and instantly implemented on the web in TourTools Online. The default setting is specified in parentheses.

<u>USERS</u>	<u>EMAILS</u>
<input type="checkbox"/> Display Past Bookings (off)	<input checked="" type="checkbox"/> Use Company Name as Sender (on)
<input checked="" type="checkbox"/> Display Past Bookings Status (off)	<input type="checkbox"/> CC Tour Planner on Conf Emails (on)
<input checked="" type="checkbox"/> Hide Cxld Bookings (off)	<input checked="" type="checkbox"/> CC Res Agent on Conf Emails (on)

Password Reset Help Text

Enter text below to be displayed on the 'Recover Password' page.

Please call us at (800) 555-5555 if you have any trouble resetting your password.

Booking Confirmation Text

Enter text below to be displayed on the "Reservation Complete" page (and in the confirmation email) once the booking is completed.

Thank you for booking with Globe Travel. You will receive a confirmation email momentarily. Please call us at (800) 555-5555 if you have any questions.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

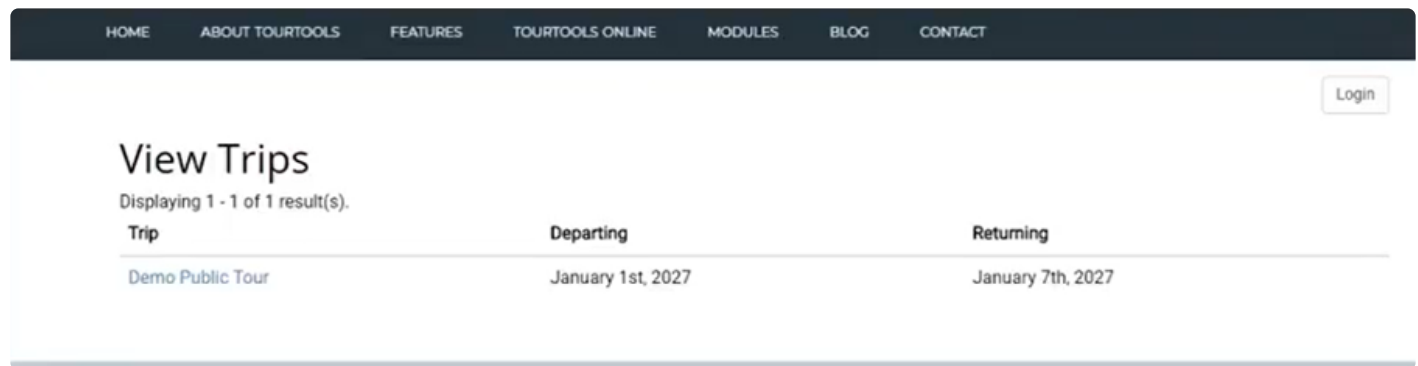
Last modified: March 27, 2023

TourTools Website Functionality

The section of the chapter demonstrates how the TourTools Online (TTO) website looks, feels, and functions as used by travelers and group leaders. TourTools Online is styled to match your website so that users rarely even notice they have moved from your primary domain to a subdomain and to the TTO web application.

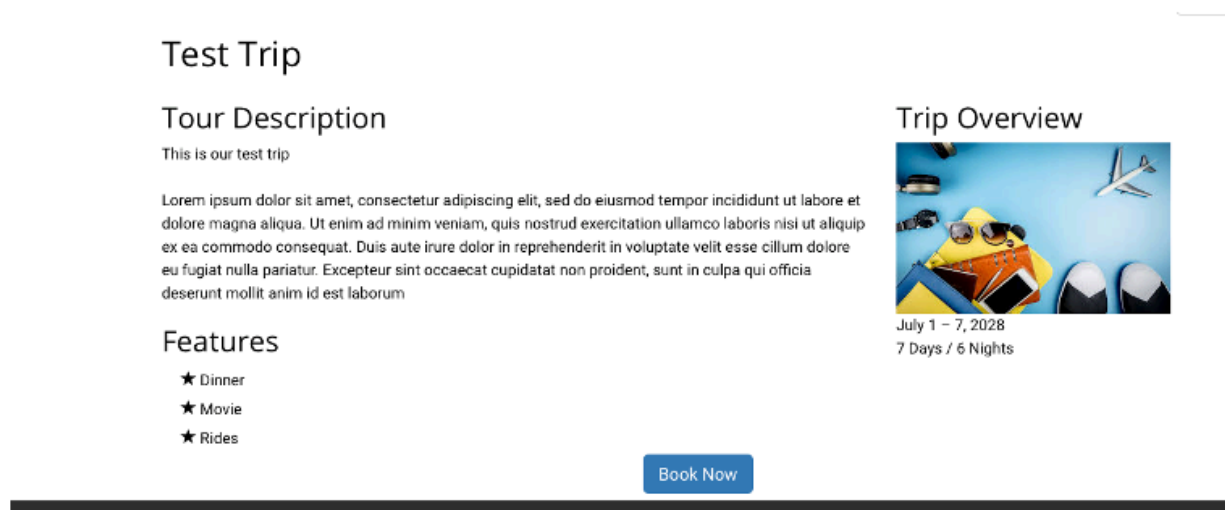
View Trips

The home page shows all public tours and private tours you wish to share. A Tour Code is used to access private tours, such as student group tours.



Tour Description

On this page you can describe the tour, include a photo, tour dates, number of days and nights, special feature locations, and provide a link to your travel brochure for users to download and browse offline.



Tour Brochure



Book A Tour

To book a tour, your customers will either log into an account they have already created or create a new one.

Login

Or

Create an Account

Create an account for the First Time

I Don't Know My Password

Recover / Reset Your Password

Note: If you already have an online account established from a previous tour, you do not need to create a new online account. You can simply login to your existing account using your e-mail and password, and make a new reservation using the new webcode.

To create an account the following information is gathered: Email, password, name, primary address, and at least one phone number. The form can be customized to your needs, and flags are used to show customers which fields are required. Each field is validated as information is entered.

[Login](#)

Register an Account

☐ Please enter all required fields.

Email Address

Confirm Email Address

Password

Confirm Password

Adult Contact Information

If you are registering a student for a tour, please provide parent/guardian information below. If you are an adult attending the tour please provide your contact information below.

First Name

Middle Name

Last Name

☐ I do not have a middle name

Primary Address

Street

Street 2

City

State / Region / Province

Postal Code

Select Country...

Address Type

Phone Numbers

☐ Please enter at least one phone number.

Phone Number

Cell Phone

Fax

If a required field is forgotten, the page will show an error message, then direct the customer to the field that needs to be filled out.

Please fix the following input errors:
Mail City cannot be blank.

Select Core Package

Customers can review the various occupancy options along with the cost per person, as well as the real time availability. We have four occupancy options available: single, double, triple, and quad.

Select Packages

Select the packages you wish to book:

Test

☒ Single Occupancy

\$2.00 per Person

 Available

☐ Double Occupancy

\$2.00 per Person

 Available

☐ Triple Occupancy

\$2.00 per Person

 Available

[Continue](#)

You have the option to disable bookings if the tour is oversold. You can also start a waitlist. A sample tour itinerary is located on this page.

Selecting Optional Packages

If a tour has optional packages available, they will appear here. You will be able to control the availability of these packages, and your customers will be able to assign them to all or a select number of passengers on a later page.

[My Account](#)

[Logout](#)

Select Optional Packages

Select the optional packages you wish to book:

Extra Night in Sicily

☐ Optional Package

\$74.00 per Person

 Available

[Continue](#)

Number of Seats

If the occupancy number does not match the passenger number, for instance when a student tour operator is booking one passenger into a double or triple occupancy room, roommate names are required. This can be configured to force the occupancy number to match the passenger number if you wish.

Enter Number of Seats

Enter the number of passengers for this trip:

☐ 1 passenger

 Available

☐ 2 passengers

 Available

Continue

My Account


Logout

Enter Number of Seats


Enter the number of passengers for this trip:

Please fix the following input errors:
The "Roommate's Name" field must be filled in.

☒ 1 passenger

 Available

☐ 2 passengers

 Available

Roommate's Name

Roommate's Name

Continue


Edit Passenger Information

Customers will enter information for each passenger. Each field is validated when the information is entered, and fields with “flags” are required. By default, the following information is collected: Name, nickname, allergies, dietary restrictions, birthdate, and gender. This can be customized to add additional fields, such as passport information or general health information. A Booking Notes field at the bottom of the page can be used to add additional notes, such as special accommodations.

Edit Passenger Information


Passenger Names

Please enter the information of the person(s) you are making the reservation for.

 Please enter all required fields.

Passenger #1

First Name


 P1First

Middle Name

 P1Middle

☐ Passenger does not have a middle name

Last Name

 P1Last

Nick Name

P1Nick

Any Allergies?

P1Allergies

Any Dietary Restrictions?

1Diet

Birthdate

 1955-04-01

Example: 02/15/2015

Gender

 Male

Passenger #2

First Name

 P2First

Middle Name

 P2Middle

☐ Passenger does not have a middle name

Last Name

 P2Last

Nick Name

P2Nick

Any Allergies?

P2Allergies

Any Dietary Restrictions?


2Diet

Birthdate

 1955-04-02

Example: 02/15/2015

Gender

 Female

Booking Notes

Who are you traveling with?

Booking Notes

[Continue](#)

Assign Packages

If optional packages are available, customers can assign those packages to all, or just some of the passengers. This can be customized, and even disabled if you choose to have the optional packages assigned to each passenger.

[My Account](#)

[Logout](#)

Assign Packages

Assign Packages to Passengers on trip.

Optional Packages

P1First P1Middle P1Last

P2First P2Middle P2Last

Extra Night in Sicily



[Continue](#)

Sign Terms and Conditions

By default, the name and date of the tour is shown, as well as the number of deposits required, the amount of those deposits, and the dates they are due. Cancellation penalty information is also included, showing cancellation dates, and the amount of the penalty. During deployment, you will need to send your terms and conditions to us, which we will use to fill out this page. Customers will need to check that they have read and understood the Terms and Conditions, then enter an online signature that will be stored in Tour Tools, as part of their online booking.

Sign Terms & Conditions

Read the Terms & Conditions below, and sign the form to indicate that you have read and understand the Terms & Conditions.

Terms & Conditions

Test Trip		
July 1 – 7, 2028		
Tour Payments and Deposits	Amount (per person)	Due Date
Balance Due		June 10, 2028
Cancellation Dates		Penalty (per person)
After February 2, 2028		\$250.00
After March 3, 2028		\$1,000.00
Cancellation Policy		

☐ I have read and understand the Terms & Conditions.

Online Signature

Please type your name in the box, *exactly* as it appears:

UFirst UMiddle ULast

Continue

Payment Information

Here customers can see an overview of their booking, including the select tour, the package information, the number of passengers, the availability and cost, the total balance, and a list of passengers. The payment schedule is shown, including amount and due dates.


Customers can choose to pay deposits, the full balance, or another amount. This can be configured as needed. Credit card and billing information is gathered, with the billing information being auto-filled based on the previously entered contact information from the account registration. Users may change the billing information if it is different from their registration information. Credit card information is not stored, so that the site is fully PCI compliant.

Payment Information

Payment Schedule

Payment Amount	Payment Due Date
Balance Due	06/10/2028

Enter your payment information in the form below:

 Please enter all required fields.

Verify the amount of your payment



















☒ \$4.00 Balance

☐ Other Amount

Other Amount

Example: 1234.56

Credit Card Information

Card Type	Month	Year
 VISA	 01 January	 2023
Card Number	Security Code	
 4111111111111111	 000	
   		
First Name	Last Name	
 UFirst	 ULast	
Address 1		
 UStreet		
City	Select State	Province / Region
 UCity	Select State	UState
ZIP / Post Code	Select Country	
 UZIP	 United States of America	
Billing Email	Phone	
 ej@adatasol.com	 (555) 000-0000	

[Review Payment](#)

Confirm Payment Details

Customers will have a chance to review the payment information before submitting the payment. On this page they will see a summary of the tour, the payment information they have entered, and a button to make changes if needed. Once the Make Payment button is clicked, the payment is sent to the payment gateway to be processed, and a booking record is created in the Tour Tools database.

Confirm Payment Details

Payment Information

Amount: \$4.00

Card Number: 4111111111111111

Card Security Code: 000

Card Expiration Date: 01/2023

Cardholder Name: UFirst ULast

Billing Address:

UStreet

UCity, UState UZIP

USA

Email: ej@adatasol.com

Phone: (555) 000-0000

Please click the Make Payment button only once to avoid being charged multiple times.

[◀ Back to Payment Details](#)

[Make Payment](#)

Confirmation Email Notice

After you make your payment, you will receive a *Reservation Confirmation Email* with your statement and Booking Number. If you do not receive this email, please call our office to confirm your booking and/or payment has been processed.

Reservation Confirmation

On the reservation confirmation page, customers are shown a thank you message, as well as an electronic copy of their invoice. This invoice includes tour information, package information, passenger list, the payment record, and a balance summary. From here, users can view their account, make another reservation, or print the invoice.

Reservation Complete

Thanks for choosing Cultural Tour Consultants for your next adventure!

Your payment has been deferred via your pre-approved status and your reservation has been processed. You will receive a confirmation email that includes your invoice and reservation number.

If you have any questions, please do not hesitate to call (856) 499-3799 or email us directly at melissa@culturaltourconsultants.com.

[View My Account](#)

[Make Another Reservation](#)

[Print This Page](#)

9/10/2018

Reservation #67915

UFirst UMiddle ULast

UStreet

UStreet2

UCity, UState UZIP

USA

Tour: Test Trip

Departing: July 1, 2028

Room Type: Double

Packages	#	Type	Price	SubTotal	PASSENGERS (2)
Test	2	Option	\$2.00	\$4.00	P1First 'P1Nick' P1Middle P1Last P2First 'P2Nick' P2Middle P2Last

PAYMENT RECORD

Date	Type	Paid
Total Packages		\$4.00
Total Options		\$0.00
Penalties		\$0.00
Insurance		\$0.00
Total		\$4.00
Less Payments Made		\$0.00
Less Discounts		\$0.00
Balance Due		\$4.00
Balance Date		6/10/2028

Cancellation Policy

If a passenger cancels from deposit to March 2, 2028 fee of \$250.00 pp; March 3, 2028 to April 1, 2028 fee of \$1,000.00 pp; no refunds if cancelled after April

My Account

Returning users will see a list of their current reservations and account details. They can update their contact information or password, and make additional payments on existing bookings, regardless of if the booking was made through the app or the website.

My Account

Reservations

Make & Review Reservations

[New Reservation](#)
[Make Payment](#)

Reservation History

- [View Current Reservations](#)

Account Actions

- [View Account Details](#)
- [Edit Contact Information](#)
- [Update Password](#)

Current Reservations

Test Trip

Departing July 1, 2028

Reservation Number: 67890

Tour Code: TEST

Passengers: P1First "P1Nick" P1Middle P1Last

Total Cost: \$2.00

[View Invoice](#)
[View Forms](#)

Dates: July 1 – 7, 2028

Status: Active

Balance Due: –

Test Trip

Departing July 1, 2028

Reservation Number: 67915

Tour Code: TEST

Passengers: P1First "P1Nick" P1Middle P1Last P2First "P2Nick" P2Middle P2Last

[View Invoice](#)
[View Forms](#)
[Make Payment](#)


Dates: July 1 – 7, 2028

Status: Active

Making an Additional Payment

When making an additional payment, customers are taken back to the same payment page they used previously. If no deposit is due, only the Pay Balance and Other Amount options are available.

Payment Information

Selected Tour			Edit
Test Trip Saturday, July 1 – Friday, July 7, 2028			
Package Information			Edit
Package Description	Passengers	Availability	Package Cost
Test	2	 Available	\$4.00
Total Packages			\$4.00
Total			\$4.00
Balance Due			\$4.00
Balance Date			6/10/2028
Passenger Information			Edit
P1First "P1Nick" P1Middle P1Last			
P2First "P2Nick" P2Middle P2Last			

Payment Information

Payment Schedule

Payment Amount	Payment Due Date
----------------	------------------

The payment confirmation page is also the same as before, but after making the payment, the payment record on the Reservation Confirmation page will reflect the new payment in both the payment list on the left, and the balance summary on the right.

Group Leader Portal

Group leaders will start at the Reservations Website, select Group Leader Login, and use their username and password to login.

Reservations Website

Enter Tour Code Make a New Reservation	Tour Participant Login View Reservations & Make Payments	Group Leaders Login Access & Manage Group Tours
---	---	--

[Login](#)

Login

[I Forgot My Password](#)
 Click here if you Forgot Your Password

Group leaders have access to additional information about the tour or tours they are leading, through the portal. Selecting a tour name will then lead to an overview of the tour.



New in TourTools Online v5: Group Leaders can make multiple bookings in a single transaction.

[My Account](#)
[Logout](#)

Group Reports

Select a Tour Code below to view reports for that tour:

Tour Code	Tour Name	Tour Date
DEMO	Demo Private Tour	January 1 - 7, 2027
DEMO2	Demo Public Tour	January 1 - 7, 2027

Overview of the Tour

This page includes a list of the bookings that have been made, a passenger list, and the contact information for the booking. The contact information may be different then the passenger list, especially in cases where a parent has booked a tour for their student. The status of the booking, the balance due and balance total can be viewed on this page. These are the default details, and they can be customized to show or hide fields as you wish.

Group Reports

Test Trip

Departing	Saturday, July 1, 2028
Returning	Friday, July 7, 2028

Actions

[Start a New Reservation](#)

[View Rooming List](#)

[Email All Participants](#)

[Back to My Groups](#)

Group Reports

[View Passenger Report](#)

[View Waitlist Report](#)

[View Cancellation Report](#)

[Edit Group Promo Page](#)

Group Bookings

Passengers	Contact Information	Status	Balance	Total
<input type="text" value="P1First 'P1Nick' P1Middle P1Last"/>	Tatiane Troxell test@adatasol.com (555) 000-0000 (555) 000-1111	Active	\$2.00	\$2.00

Actions

Group leaders also can perform several different actions, such as viewing the rooming list, emailing all passengers, and returning to a list of the tours that group leader is leading. Below is an example of a rooming list. The rooming list includes the room number assigned, the room type, the passenger gender, and the age of the passenger. Room numbers are assigned by default in TourTools by the reservation agent, and there is an option to allow the group leaders to assign the room number.

Rooming List

[Back to Group](#)

- **Tour Name:** Test Trip
- **Departing:** July 1, 2028
- **Returning:** July 7, 2028

[Print This Page](#)

Singles: 19 **Doubles:** 10.5 **Triples:** 0.67 **Quads:** 0 **Total:** 6

Room #	Type	Name	Gender	Age
	Single	P1First "P1Nick" P1Middle P1Last	M	63
	Single	P1First "P1Nick" P1Middle P1Last	M	63
	Double	P1First "P1Nick" P1Middle P1Last	M	63
	Double	P1First "P1Nick" P1Middle P1Last	M	63
	Double	P1First "P1Nick" P1Middle P1Last	M	63
	Double	Test "P1Nick" T Test	M	63

When selecting Email All Participants, know that the user emails are not shared, as the emails are sent via a blind carbon copy (Bcc) to protect privacy.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Accessibility

Accessibility (WCAG)

When it comes to accessibility compliance, the Web Content Accessibility Guidelines (WCAG) version 2.0 AA is the most-used standard worldwide. There are three levels of WCAG compliance; A, AA, and AAA.

TourTools Online is WCAG 2.0 Level AA compliant. WCAG compliance level AA is used in most accessibility rules and regulations around the world, including the ADA. To meet WCAG 2.0 Level AA conformance, the website is usable and understandable for the majority of people with or without disabilities. The meaning conveyed and the functionality available is the same.

Some notable WCAG 2.0 Level AA requirements include:

- Color contrast is, in most instances, at least 4.5:1
- Alt text or a similar solution is used for images that convey meaning
- Navigation elements are consistent throughout the site
- Form fields have accurate labels
- Status updates can be conveyed through a screen reader
- Headings are used in logical order

If you find any accessibility issues with TourTools Online, please [notify us](#) so that we may quickly resolve it.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

MailChimp

The Mailchimp API is a pretty straightforward API to configure in TourTools; all the essential settings are configured in System Settings. But before getting into the TourTools part, some initial work must be accomplished on the Mailchimp website.

TourTools Features:

Here is a list of features currently available in the system and also the ones that are available for release per requests:

Available:

- Download all available audiences back into TourTools
- Create TourTools clients in Mailchimp
- Update TourTools clients into Mailchimp
- Download member's stats from Mailchimp into TourTools
- Download member's subscription status from Mailchimp into TourTools

Available for release, not in TourTools yet:

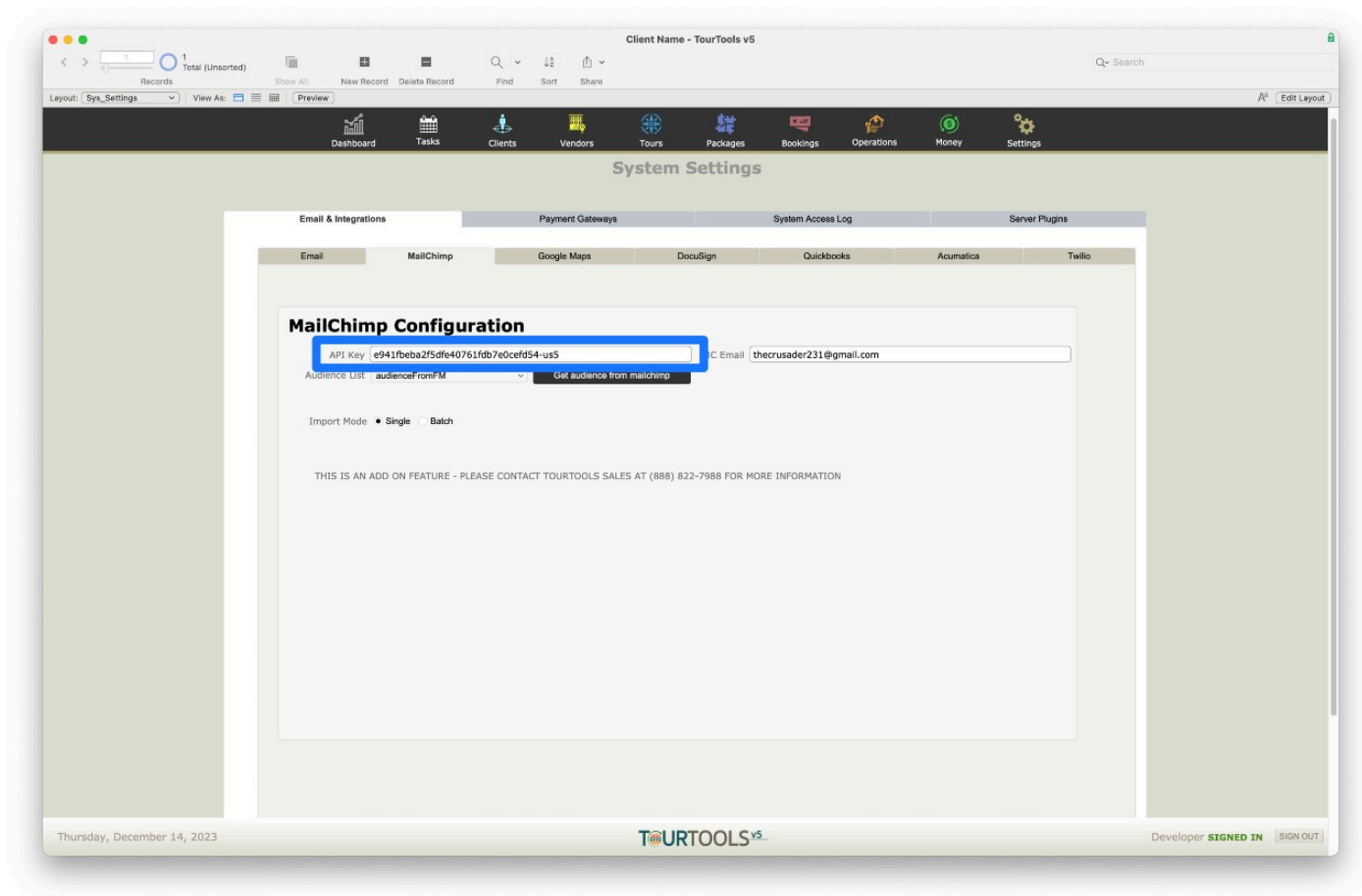
- Create & Manage Campaigns from TourTools
- Create & Manage Audiences from TourTools
- Update Audience's Members from TourTools
- Follow Campaigns Stats
- Create, Update, & Delete Templates
- Create, Update, & Delete Schedules

Initial Setup:

The first step is to go configure an API Key on Mailchimp following this tutorial provided by them:

[About API Keys | Mailchimp](#) API Keys | Mailchimp

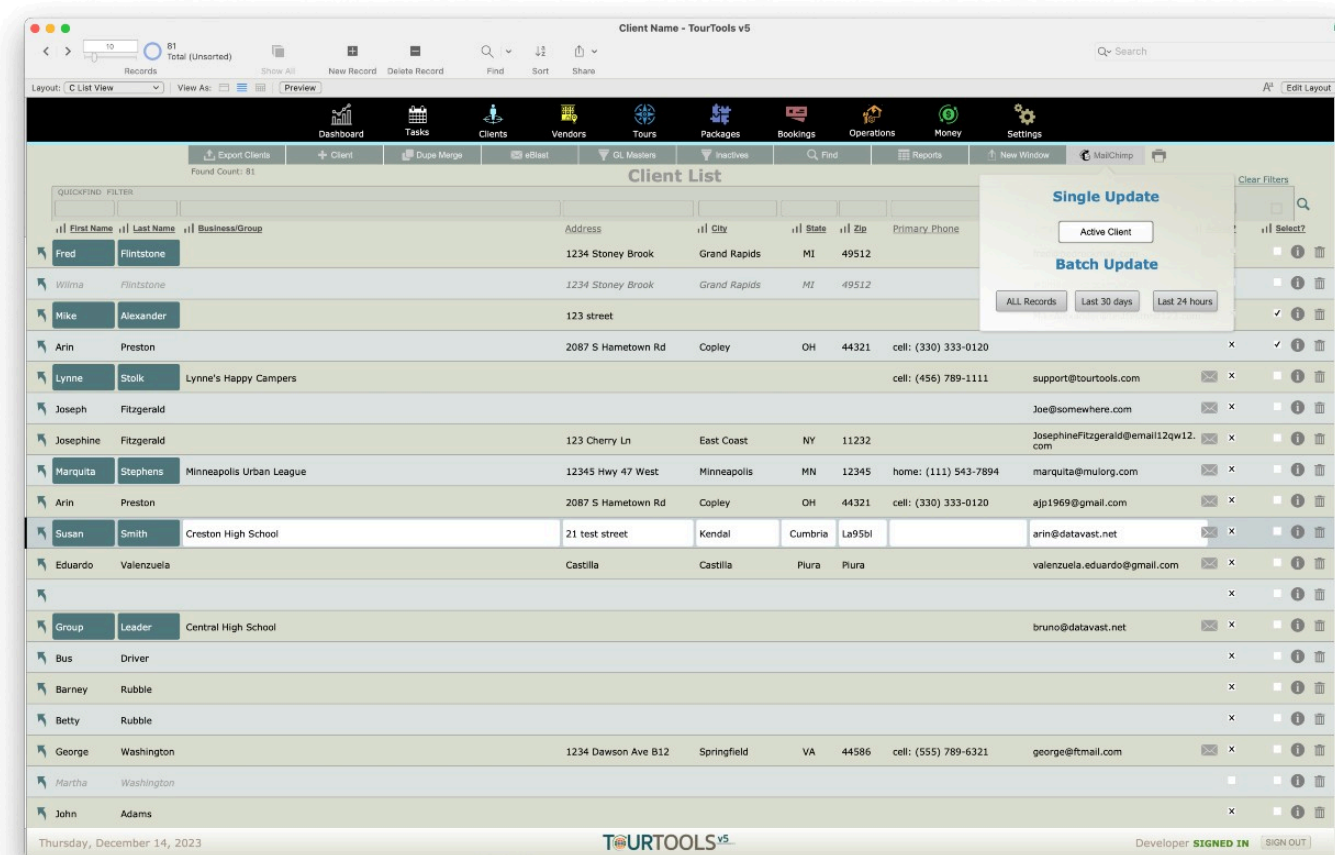
TourTools Settings:



Once everything has been successfully done – you can input the API Key and the email address linked to the account onto TourTools settings and click the “Get Audience from Mailchimp” button.

The field Audience List will populate with a list of the available audience on your account; the audience you select will be used to upload new contacts from TourTools into your Mailchimp account later. Choosing one for the rest of the system to work effectively is essential.

Client List:



In the client module list view, a Mailchimp menu will appear if the API key is populated in the settings on the upper right corner of the layout.

In this menu, you will find the following options:

- **Single Update:** The single update will upload or update the currently selected record information into Mailchimp.
- **Batch Update: All Records:** This button will take the entire found set and update their information into Mailchimp.
 - **Batch Update: Last 30 Days:** * This button will only select the records that were modified or created in the last 30 days and update their information in Mailchimp
- ***Batch Update: Last 24 Hours :** *This button will only select the records that were modified or created in the last 24 hours and update their information in Mailchimp

All of the update sequences will also create new contacts in Mailchimp if they don't exist already; this script is used to handle both requests automatically.

Client Details:

In the client details, if an API key has been entered in Settings, Mailchimp will be available for the user to use. This is a pretty straightforward layout; it offers the user two options ;

- **Sync to Mailchimp:** This button does the same thing that the update button does in the list view for the Client being browsed – it either creates or updates the information in Mailchimp and also gathers the subscription status of the member.
- ***Refresh Stats:** *The refresh stats buttons will automatically update the list of available audiences in the system and download the stats for the Client being browsed from Mailchimp; the stats will be displayed as a %.

The screenshot displays the 'Client Details' page for 'Susan Smith - Creston High School' in the TourTools v5 application. The interface includes a sidebar with navigation options like Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. The main content area is divided into several sections:

- Client Information:** Fields for Title (Susan), First Name (Smith), Last Name (Smith), Business/School/Group (Creston High School), Business Title, Primary Email Address (arin@datavast.net), Home #, Cell #, Work #, Primary #, and Home Address (21 test street, Kendal Cumbria Le95bl).
- Client Categories:** A list of categories with checkboxes: Group Leader (checked), Decision Maker, Individual Traveler, Other, Payer, and Tour Operator.
- RELATED CLIENTS:** A section for adding related clients.
- CRITICAL NOTES:** A section for adding important notes.
- First Traveled / Last Traveled:** Fields showing the dates (2023).

Below the client information, there is a 'Mailchimp' section with the following details:

- Mailchimp Information:** ID (1e4e2a1368d84fe1c74cfe81305b8ec) and Status (Subscribed).
- Mailchimp Statistics:** Click Rate (0.00%), Click Open (0.00%), and Rating (4 stars).

At the bottom of the Mailchimp section, there are two buttons: 'Sync to MailChimp' and 'Refresh Stats'.

This will display the global average Click Rate, Open Rate, and general Rating of the Client combined for all audiences directly from Mailchimp.

Server Sequence & Automation:

For clients that would like their statistics & updates to be fully integrated automatically, we have designed

two scripts that any developer can program on the server to run the sequence.

- **onServerMailchimp (client_client):* *This script will go through all Client records with a Mailchimp ID and gather their stats automatically – this is quite the script, so it's important not to run it locally on FileMaker Pro – since it can freeze your system for several hours.
- **Batch Upsert To Mailchimp:* *This script can be run with all the parameters and will run and update/ sync all Contacts available on Mailchimp.

Last modified: January 2, 2024

DocuSign Sync

The new DocuSign Sync functionality in TourTools v5 enables you to send documents for signature from TourTools and sync with your docusign account. A specialized DocuSign account is required for use of this feature.



This functionality is being finalized and documentation written. Check back here for updates.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Email/Task Automation Module (ETAM)



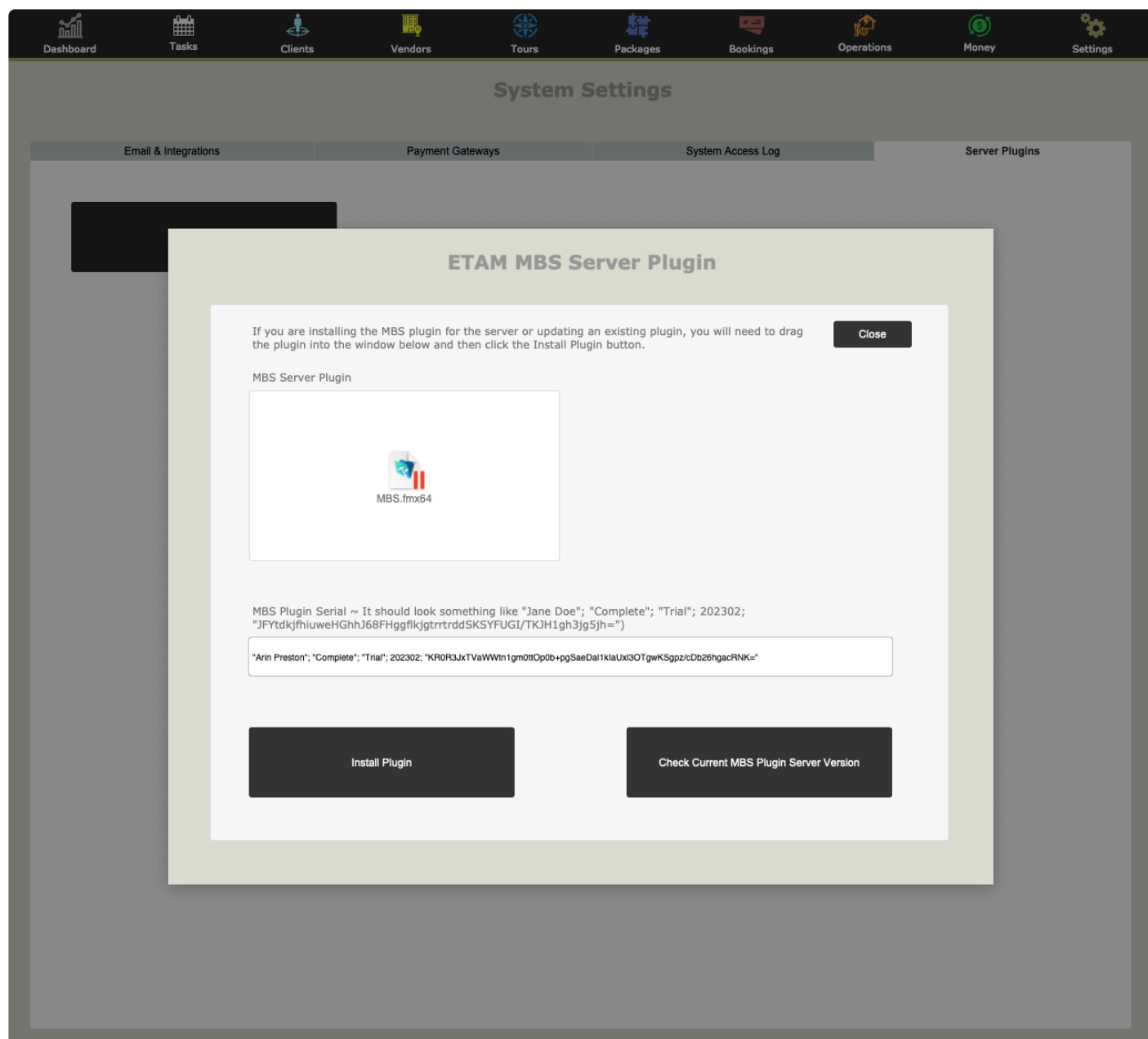
<https://player.vimeo.com/video/797042901>

Optimize Your Communications Workflow with the Email & Task Automation Module



TourTools users can have welcome emails, payment reminders, late payment notices, post-tour emails, etc. sent out automatically, every night, from their TourTools application. Email messages are sent based on criteria that you specify. The blocking tool allows you to exempt certain tours and bookings from the process, making the feature highly flexible. Internal task creation can also be automated with this feature.

This feature does require the purchase and install of the [MBS Plugin](#). Once purchased, drag and drop the plugin into this window and TourTools will install it on startup automatically.



Feature Summary

The email and task automation system utilizes 'modules' to process data within the database automatically. An example of this would be to automatically send an email, tailored to each passenger traveling on any Bookings which will be departing within 3 weeks.

The term 'modules' can refer to emails or tasks that are processed automatically on a specific date. The information pertaining to the email or task is held within a Module record, however, although Modules can be considered to be global (eg a Module can be referenced from any Tour) there needs to be method to store Tour specific information – such information is stored in a Checklist record. You can compare a Module to an uncompleted questionnaire whereas a Checklist would be the answers to the questionnaire (without the questions) – on their own, they are of little use but when combined, they serve a purpose.

Module Recap: an email module will hold general terms but isn't specific to a particular Tour eg "120 days before a Tour departs, a specific email needs to be sent to all travelers on a Tour." Thus a Module will store the fact that an email needs to be sent 120 days before the Tour departs but since it's not specific to a Tour, it doesn't store when that is because different Tours may have different depart dates.

Checklist Recap: a checklist is linked to a specific Tour and a specific Module, so the checklist links a Module to a Tour so we can tell exactly when a specific Module needs to be processed for a specific Tour.

Administration

Module records can be accessed in the Business Settings layout > Email & Task Automation tab.

Title	Type Module	Countdown Days	Type Of Person	Live?	Default Blocked?
160 Day Account Manager First Payment Reminder	Task	0	Group, Individual, Family	Yes	No
Introduction Email	Email	0	Group, Individual, Family	Yes	No
Resources & Information Email	Email	240	Group, Individual, Family	Yes	No
Passports, Payments, Rooming Checkin	Email	180	Group, Individual, Family	Yes	No
First Payment Reminder	Email	150	Group, Individual, Family	Yes	No

A nightly schedule runs and generates emails as required. if any email Modules are sent out, a report is created showing the results of the. The report is sent to the address set in the Email Report Address field.

If you need to test the ETAM system you can add an email address to the Email Test Address field and emails will be sent there instead of to the Account Manager, Host or Traveler email address.

Each Module record is displayed in a portal and can be shown in detail via a card window (shown below) which is Module type specific (ie there is one layout for email Modules and another for task Modules). The Module card windows allow the user to adjust all aspects of the module.

In the case of email Module records, the user can:

1. See what the non-HTML and HTML body of the mail will look like.
2. Insert mail merge tags for the record data required in the email.
3. Include email attachments.
4. determine when the email delivered.
5. Set who the email is delivered to.

Automated Email Template

Close

Automated Email Template Title

F - Friendly Introduction

Who receives this automated email?

Account Manager ☐ Host ☐ Traveler ☒

BEFORE or AFTER? Before Count Down Days 0

Email Subject Friendly Introduction Default Blocked? No Email Template Live? Yes

Notes	HTML Body	Non-HTML Body	HTML Preview	Filters	Attachments	Misc
<p>F: Friendly Introduction: Intro to Hosts</p> <p>(TourCode) is live and active. Gather brochure, tour webpage link, and any additional material that applies to this tour. Reach out to the Tour Host (TourHostName) with the information they need to start their tour.</p> <p>Sent - On Tour Set Up</p> <ul style="list-style-type: none"> *include social media clickable icons *include tour payment schedule *include account manager information *include pdf of trip brochure? 						

General settings are shown below and highlighted in red.

Automated Email Template

Close

Automated Email Template Title
F - Friendly Introduction

Who receives this automated email?
 Account Manager ☐ Host ☐ Traveler ☒

Email Subject
Friendly Introduction

BEFORE or AFTER? Count Down Days

Before 0

Default Blocked? Email Template Live?

No Yes

Notes	HTML Body	Non-HTML Body	HTML Preview	Filters	Attachments	Misc
<p>F: Friendly Introduction: Intro to Hosts</p> <p>(TourCode) is live and active. Gather brochure, tour webpage link, and any additional material that applies to this tour. Reach out to the Tour Host (TourHostName) with the information they need to start their tour.</p> <p>Sent - On Tour Set Up</p> <ul style="list-style-type: none"> *include social media clickable icons *include tour payment schedule *include account manager information *include pdf of trip brochure? 						

BEFORE or AFTER

Determines when the email will be sent – BEFORE the Tour takes place or AFTER it returns.

Count Down Days

Refers to how many days the email will be sent either BEFORE the Tour departs or AFTER it returns.

Default Blocked?

When a Module is added to a Tour, will it be blocked initially (ie won't send for that Tour) or not. This is a handy feature as it will allow the user to create a test Module, add it to Tours but block it as a default (so it doesn't get sent). Then the user can set it to unblocked for just the chosen tours. It can also be used in cases where a Module might only be used to certain types of Tour so needs handling manually.

Email Template Live?

If a Module isn't live then when a Tour becomes active, it will not be added to the list of Modules for that Tour. This is handy as it allows the user to create a Module but not have it processed until they are ready (eg for Modules which are in the process of being edited).

To add a mail merge tag to an email, go to the HTML Body or NON-HTML body tab. Place the cursor into the text where you want it to appear (highlighted below in red), then select from the list by clicking onto the mail merge tag (highlighted below in green).

Automated Email Template

Close

Automated Email Template Title
F - Friendly Introduction

Who receives this automated email?
 Account Manager ☐ Host ☐ Traveler ☒

BEFORE or AFTER? Count Down Days

Email Subject
Friendly Introduction

Default Blocked? Email Template Live?

Notes HTML Body Non-HTML Body HTML Preview

Filters Attachments Misc

Hello {!FirstName!},
 Thank you for registering for {!TourBrochureName!}. We look forward to having you on our tour. Our plans can seem daunting, but we will be with you every step of the way. Just follow our checklist below to get started:
 - Submit a copy of your passport to [redacted]
 - Review the payment schedule for your tour below
 - Provide us with your departure city (please note additional fees may apply for requests outside of group departure city)
 - Purchase travel insurance at [redacted] com/main/
 - Check out our website and social media platforms for resources
 Payment Schedule
 {!PaymentScheduleNonHTML!}
 We cannot wait for you to travel with us! If you have any questions or we can serve you in any way, please let us know!
 Your enrollment and payment constitutes acceptance of our terms. Please follow the link to review them in full: [https://www.tourtools.com/terms](#)

{!AccountManagerEmail!}
 {!AccountManagerName!}
 {!Email!}
 {!FirstName!}
 {!LastName!}
 {!PaymentScheduleHTML!}
 {!PaymentScheduleNonHTML!}
 {!TourBrochureName!}

Some email Modules will require attachments. You can drag and drop an attachment into one of the attachment boxes (shown below). These attachments cannot be Tour specific as you will be selecting a single attachment for (potentially) all Tours.

In the case of Trip Brochures, which are Tour specific, you will need to select YES for the “Include Tour Brochure field” (shown below in red). Since Tour Brochures ARE specific to a Tour, you will need to ensure that the Brochure has been added to each Tour that requires one. You can add the brochure from the Tour Detail page via either the Web Publishing > Docs for Download tab or the TourTools Online > Docs for Download tab.

Automated Email Template

Close

Automated Email Template Title

Who receives this automated email?
 Account Manager ☐ Host ☐ Traveler ☒

BEFORE or AFTER? Count Down Days

Email Subject

Default Blocked? Email Template Live?

Notes	HTML Body	Non-HTML Body	HTML Preview	Filters	Attachments	Misc
<div> <p>Include Tour Brochure?</p> <p><input type="button" value="Yes"/></p> <p><i>Tour Brochures are specific to a Tour so should be included via this menu option rather than the attachment boxes. The Tour Brochure PDF should be stored in the Docs For Download section in Tour Details and set with a Type of 'Brochure'.</i></p> </div>						

Testing

To test a Module, it is recommended that you create a test Tour and populate it with Bookings and Passengers with a known email address. From the Tour detail layout, you can then use the manual method of sending out a single email Module (by clicking the icon at the end of a row).

For additional protection, you can set the Email Test Address field (shown below in red) in the Business Settings > Email & Task Automation tab to a chosen address and all emails (except for the email report) will go there instead.

Tour Modules

The portal showing the Modules specific to a Tour (shown below) can be accessed in the Tour Detail layout > Tasks / Docs tab > Email & Task Automation tab. From here you can see how many days are left before the email will be automatically generated, who the email is going to (notice the Account manager, Host and Traveller check boxes). You can also tell if the Module is Blocked or not.

If the “?” icon appears on a row, it indicates that the Tour Brochure is expected to be used for that Module but one has not been added to the Tour. If this is the case, you will need to add the brochure via either the Web Publishing > Docs for Download tab or the TourTools Online > Docs for Download tab (please ensure that the document TYPE is set to BROCHURE otherwise it will not be included in the email).

Things you can do:

1. You can manually change the date that the email will be sent out by clicking in the date field for the chosen email.
2. Recreate the email Module for the Tour (in case you want to reset it to its original value) by clicking the gear/settings icon.
3. You can manually send an email Module out by clicking the envelope icon.
4. If the message “Default settings missing – please click here to define them” appears, you will need to click the message and the missing Checklist data will be created.

					Type Person					
Automated Email / Task Title	Initial Days	Date Sending	Days Left	Date Sent				Type	Blocked?	
F - Friendly Introduction	0 Before	19/12/2022	Invalid Days (-1)					Email	No	

Booking Modules

The portal showing the Modules specific to a Booking (shown below) can be accessed in the Booking Detail layout > Tasks / Docs tab > Email & Task Automation tab. From here you can see whether a Module is blocked at the Tour level (Tour Block? column) or for this current Booking (Block Emails? column).

To explain this further, if you want to block an email Module for an entire Tour, you would head to the Tour Module portal (described in the Tour Module tab of this help guide) and set “Blocked?” to YES. Alternatively, if you only want to block an email Module for certain Bookings within a Tour, you would set the “Block Emails?” column to YES.

TASKS / DOCUMENTS			
Task List		Documents	
Automated Email / Task Title		Block Emails?	Tour Block?
Introduction Email		Yes	No

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

Sales Module

TourTools® has developed add-on functionality to make the client database and RFQ functionality available to an “outside sales” team to access from the web.

How it Works

Your outside sales representatives are given a web login and presented with a Dashboard displaying their sales activities and RFQs. This allows users to browse the TourTools client database and mark specific clients as accounts they are currently working.

SALES DASHBOARD | TISH KNUDSEN

Activity Last 30 Days

Sales Activities [previous and scheduled]

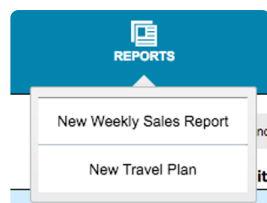
Activity Date	Group/Contact	Follow Up Date
01/20/20	Desiring Destinations - LAURIE BROWN	
01/20/20	Adventure Travel and Tours - CLARA HILL	
01/20/20	Group Travel - BRIC FORREST	
01/20/20	Gathering's Plus - RANDI MEYER	
01/20/20	Mid American Coaches - SHELIA KOBLEN	

RFQs

Date	Group/Contact	Details
02/15/20	RFQ-7015	Proposal Needed By: 2/21/2020 LAND: Probability Customer
02/11/20	RFQ-6955	Proposal Needed By: 2/21/2020 LAND: Probability Customer
02/11/20	RFQ-6960	Proposal Needed By: 2/21/2020 LAND: Probability Customer
02/10/20	RFQ-6925	Proposal Needed By: 2/14/2020 LAND: Probability Customer
02/08/20	RFQ-6920	Proposal Needed By: 2/14/2020 LAND: Probability Customer

Your outside sales representatives can create an RFQ for a client while sitting in their office and gathering the details and requirements. The system shows past activity for each client so the rep can see patterns. Once they submit the RFQ, a new RFQ notification email is sent to the office.

By default, this module comes with two reports – a **Travel Plan**, showing which clients the rep will be visiting that week, and a **Weekly Sales Report**.



NOTE: The Web Direct Sales Tool can be configured to work with TourTools v3, v4, or v5 but requires FileMaker v16 or newer on the server.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: March 27, 2023

QuickBooks Module

Push Your Transactions to QuickBooks to Eliminate Redundant Entry



<https://player.vimeo.com/video/835581605>

TourTools® has developed a QuickBooks general ledger integration for receivables and payables management. QuickBooks is a leading small-business accounting package. This will allow you to eliminate the redundancy of pushing payment or refunds twice – staff no longer need to manually enter data into TourTools® and then again in QuickBooks.



TourTools® users can enter all daily receipts, cash, checks and credit cards and then transfer individual or select groups of transactions directly into QuickBooks.

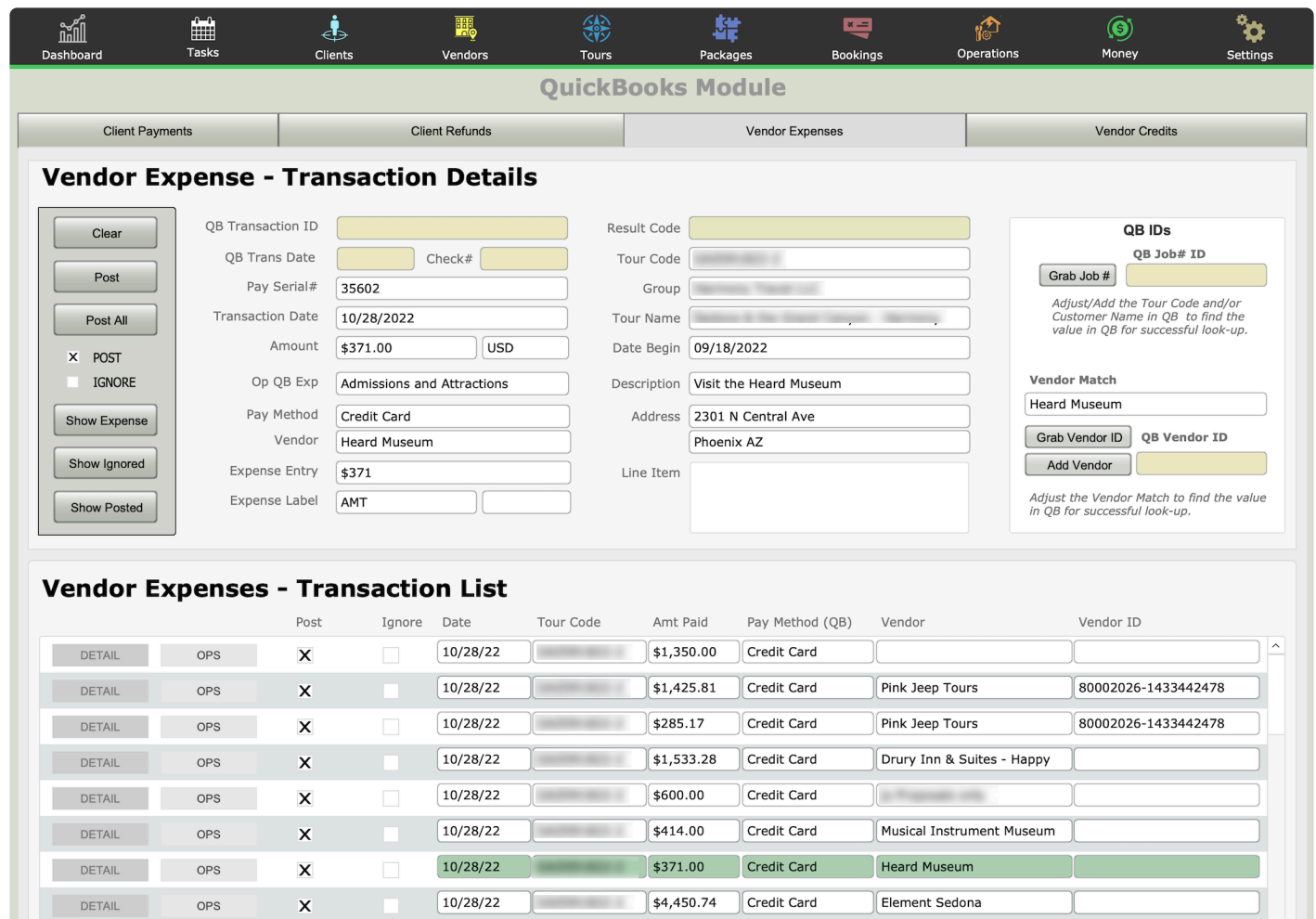
Each transaction is posted to the appropriate bank, revenue, and expense accounts. Also available: adjust for credit card-related bank changes as part of the transaction.

TourTools v5 now offers support for QuickBooks Online!

How it Works

Each transaction references a QuickBooks job# record that is created in the QB Customer Table.

As each transaction is processed, TourTools® checks to see that the job# exists for the associated tour. If a job# is not present in QuickBooks, then TourTools® creates the job# record and posts the transaction.



The screenshot displays the QuickBooks Module interface. At the top is a navigation bar with icons for Dashboard, Tasks, Clients, Vendors, Tours, Packages, Bookings, Operations, Money, and Settings. Below this is the 'QuickBooks Module' header, which includes tabs for Client Payments, Client Refunds, Vendor Expenses, and Vendor Credits. The main content area is titled 'Vendor Expense - Transaction Details' and contains a form with various input fields and buttons.

Vendor Expense - Transaction Details Form:

- Buttons:** Clear, Post, Post All, POST (checked), IGNORE, Show Expense, Show Ignored, Show Posted.
- Fields:**
 - QB Transaction ID: [Empty]
 - QB Trans Date: [Empty] Check#: [Empty]
 - Pay Serial#: 35602
 - Transaction Date: 10/28/2022
 - Amount: \$371.00 USD
 - Op QB Exp: Admissions and Attractions
 - Pay Method: Credit Card
 - Vendor: Heard Museum
 - Expense Entry: \$371
 - Expense Label: AMT
 - Result Code: [Empty]
 - Tour Code: [Empty]
 - Group: [Empty]
 - Tour Name: [Empty]
 - Date Begin: 09/18/2022
 - Description: Visit the Heard Museum
 - Address: 2301 N Central Ave, Phoenix AZ
 - Line Item: [Empty]
- QB IDs Section:**
 - QB Job# ID: [Empty]
 - Grab Job #: [Empty]
 - Adjust/Add the Tour Code and/or Customer Name in QB to find the value in QB for successful look-up.
 - Vendor Match: Heard Museum
 - Grab Vendor ID: [Empty] QB Vendor ID: [Empty]
 - Add Vendor: [Empty]
 - Adjust the Vendor Match to find the value in QB for successful look-up.

Vendor Expenses - Transaction List Table:

	Post	Ignore	Date	Tour Code	Amt Paid	Pay Method (QB)	Vendor	Vendor ID
DETAIL	OPS	X	10/28/22	[Empty]	\$1,350.00	Credit Card	[Empty]	[Empty]
DETAIL	OPS	X	10/28/22	[Empty]	\$1,425.81	Credit Card	Pink Jeep Tours	80002026-1433442478
DETAIL	OPS	X	10/28/22	[Empty]	\$285.17	Credit Card	Pink Jeep Tours	80002026-1433442478
DETAIL	OPS	X	10/28/22	[Empty]	\$1,533.28	Credit Card	Drury Inn & Suites - Happy	[Empty]
DETAIL	OPS	X	10/28/22	[Empty]	\$600.00	Credit Card	[Empty]	[Empty]
DETAIL	OPS	X	10/28/22	[Empty]	\$414.00	Credit Card	Musical Instrument Museum	[Empty]
DETAIL	OPS	X	10/28/22	[Empty]	\$371.00	Credit Card	Heard Museum	[Empty]
DETAIL	OPS	X	10/28/22	[Empty]	\$4,450.74	Credit Card	Element Sedona	[Empty]

The same process is followed for vendor expenses or credit transactions: TourTools® checks to see if the vendor record exists in QuickBooks prior to posting the expense transaction. If no vendor record exists, then TourTools® creates the vendor and posts the transaction.

Check Queue Feature

The built-in "Check Queue" feature allows users to select services to be paid and move the transactions from TourTools® into QuickBooks so each bill is ready for payment. If the service has been paid by a method of payment other than check, then the transaction is recorded as such. Each transaction is posted to the designated vendor, the job# for the current tour, and the default accounts payable account.

Available Transactions

CLIENT PAYMENTS

Check deposit to bank account and revenue account (liability account).

Credit card deposit to bank account and revenue account (liability account) with optional calculated bank fee.

Dashboard

Tasks

Clients

Vendors

Tours

Packages

BOOKINGS

Operations

Money

Settings

Client Payments

Client Refunds

Vendor Expenses

Vendor Credits

Client Payment - Transaction Details

Clear

Post

Post All

Show Payments

Show Ignored

Show Posted

Payment Serial#

33523

Transaction Date

2/9/2023

Paid Amount

\$1,016.00

Pay Method

Cashier's Check

Cash/Check

\$1016

CC Passthru

\$0

Credits

\$0

Discount

\$0

Client ID #

150496

Result Code

Tour Code

DCPERF10282023

Group Name

Creston High School

Trans Type

Check

Trans Description

saddsadsaads

FullName

Mike Alexander

Cash?

Res Agent

G

Transfer

0

Check #

Ignore

☐

QB Invoice ID

QB Trans

QB Payment ID

Card Number

Card Expiration Date

Card Name

Card Type

Billing Zip

Approval

Trans ID #

Client Payments - Transaction List

	Ignore	Date	Type	Pay Method	Tour Code	Amt Paid	Client	Client QB ID	
DETAIL	BOOKING	<input type="checkbox"/>	5/24/23	Credit Card		DCPERF10282023	\$10.00	Fred Flintstone	
DETAIL	BOOKING	<input type="checkbox"/>	5/23/23	Credit Card		DCPERF10282023	\$20.00	Fred Flintstone	
DETAIL	BOOKING	<input type="checkbox"/>	5/16/23	Credit Card		DCPERF10282023	\$300.00	Fred Flintstone	
DETAIL	BOOKING	<input type="checkbox"/>	5/16/23	Credit Card		DCPERF10282023	\$150.00	Fred Flintstone	
DETAIL	BOOKING	<input type="checkbox"/>	4/19/23	Credit Card		DCPERF10282023	\$500.00	Fred Flintstone	
DETAIL	BOOKING	<input type="checkbox"/>	4/19/23	Credit Card		DCPERF10282023	-\$500.00	Fred Flintstone	
DETAIL	BOOKING	<input type="checkbox"/>	3/16/23	Credit Card		DCPERF10282023	\$5.00	Group Leader	
DETAIL	BOOKING	<input type="checkbox"/>	2/9/23	Check	Cashier's Check	DCPERF10282023	\$1,016.00	Mike Alexander	
DETAIL	BOOKING	<input type="checkbox"/>	5/3/23	Cash		EXPGR06252023	\$1,000.00	George Washington	94
DETAIL	BOOKING	<input type="checkbox"/>	3/22/23	Cash		EXPGR06252023	\$100.00	Lynne Stolk	80000004

CLIENT REFUNDS

Check refund to client, from bank checking and revenue account (liability account).

Credit card refund to client, from credit card and revenue accounts (liability account).

Dashboard

Tasks

CLIENTS

Vendors

Tours

Packages

Bookings

Operations

Money

Settings

QuickBooks Module

Client Payments

Client Refunds

Vendor Expenses

Vendor Credits

Clear

Refund

Show Refunds

Show Ignored

Show Posted

QB Transaction ID

1-1675966867

QB Trans

2/9/2023

Payment Serial#

33518

Transaction

2/9/2023

Income Adjustment

Refund Amount

\$0

Commission

Check #

Result Code

OK

Tour Code

CRU08282023

Group Name

Business

Creston High School

Trans Type

Cash

Trans Description

Full Name

Susan Smith

Res Agent

G

Transfer

0

Ignore

☐

Client Refunds - Transaction List

Post	Ignore	Date	Type	Tour Code	Type Adj	Adj Amt	Client	TRX ID

VENDOR EXPENSES

Payment to vendor for services rendered, posted as a bill.

Dashboard

Tasks

Clients

Vendors

Tours

Packages

Bookings

Operations

Money

Settings

QuickBooks Module

Client Payments

Client Refunds

Vendor Expenses

Vendor Credits

Vendor Expense - Transaction Details

Clear

Create Bill

☐ POST
 ☐ IGNORE

Show Expense

Show Ignored

Show Posted

QB Transaction ID

1-1675966867

Result Code

OK

QB Trans

2/9/2023

Check#

Pay Serial#

33518

Tour Code

CRU08282023

Transaction Date

2/9/2023

Group

Tour Name

Bahamas Cruise

Amount

Date Begin

8/30/2023

Op QB Exp

Description

Pay Method

Cash

Address

Vendor

Expense Entry

Line Item

Expense Label

Amt

Vendor Expenses - Transaction List

Post	Ignore	Date	Tour Code	Amt Paid	Expense Account	Pay Method (QB)	Vendor	Vendor ID

VENDOR CREDITS

Credit from vendor for overpayment, posted as a credit.

QuickBooks Module

Client Payments Client Refunds Vendor Expenses Vendor Credits

Vendor Credit - Transaction Details

<div>Clear</div> <div>Post Credit</div> <div>Show Credits</div> <div>Show Ignored</div> <div>Show Posted</div>	QB Transaction ID	<input type="text" value="1-1675966867"/>	Result Code	<input type="text" value="OK"/>
	QB Trans Date	<input type="text" value="2/9/2023"/>	Tour	<input type="text" value="CRU08282023"/>
	Payment Serial#	<input type="text" value="33518"/>	Group Name	<input type="text"/>
	Transaction Date	<input type="text" value="2/9/2023"/>	Tour Name	<input type="text" value="Bahamas Cruise"/>
	Amount Received	<input type="text" value="\$0.00"/>	Date Begin	<input type="text" value="8/30/2023"/>
	Op QB Exp Account	<input type="text"/>	Description	<input type="text"/>
	Pay Method	<input type="text" value="Cash"/>	Address	<input type="text"/>
	Vendor	<input type="text"/>	Ignore	<input type="checkbox"/>
	Expense Entry	<input type="text"/>		
	Expense Label	<input type="text" value="Amt"/>		

Vendor Credits - Transaction List

Post	Ignore	Date	Tour Code	Amt Rec'd	Pay Method	Vendor	Vendor ID

CONNECTING QB

In order to connect the QB module to your TTv5 system, first make sure you have discussed the integration with your developer.

Click on the “Settings” module, then “System Settings” from the dropdown menu. Click on Quickbooks under “Email & Integrations”. Under the Quickbooks Configuration header you will see a button with the QB logo labeled “Connect to Quickbooks”. A dialog box will open with step by step directions including the first step to connect via a green button. Click the button and follow the on-screen directions!

NOTE: The customization base price includes the programming required to post expense payments (payables) and receipts (revenue) with debits and credits as well as refunds. Additional functions, as well as more complex transaction postings consisting of multiple debits or credits, are also possible utilizing TourTools and the FM Books Connector plug-in.

If you have any questions that are not answered here [Contact TourTools Support](#) for assistance.

Last modified: June 12, 2023

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