

# *CoachSys*



# *Booking System*

## Manual

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# Introduction

The CoachSys Booking System is a private hire, contract hire, tours, invoicing and payments management system. Fully networkable it permits users, via the security section, to have full or restricted rights to the system.

We highly recommend that you read the manual fully or check on the web site for help before contacting support.

## Starting The CoachSys Booking System

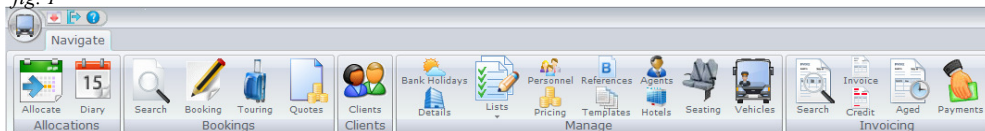
After installation click on the icon on your desktop or select the *CoachSys Booking* entry in your program list from the Start Menu. From the main screen select your User Name from the text box (*Select User Name*) and enter your password into the box below (*Enter Password*) and press the *Enter* or *Return* key on your keyboard. This will allow you entry into the system.

The manual starts with the *Manage* section because this is where you need to go to first to begin using the system.

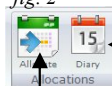
### Overview of the system

To navigate to different parts of the system click on the relevant icon on the *Navigate* panel at the top of the window; *fig. 1* shows all the icons available on the navigation ribbon. Descriptions of what each icon does when selected follows from *fig. 2* to *fig. 7*. The relationship between the different elements of the system are shown in *fig. 8*.

*fig. 1*



*fig. 2*



Open the diary screen to see vehicles, bookings and personnel in a diary format.

Show the allocations screen where you can allocate vehicles and personnel to work and print work tickets.

*fig. 4*



Open the clients screen to add, edit and delete clients.  
Print out reports for clients.

Open the touring screen.

*fig. 3*



Find a booking.

Open the screen for private hire and contracts.

Open the quotes screen.

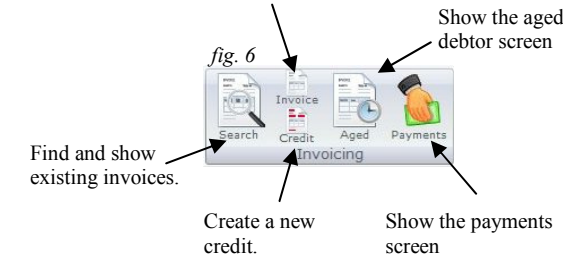
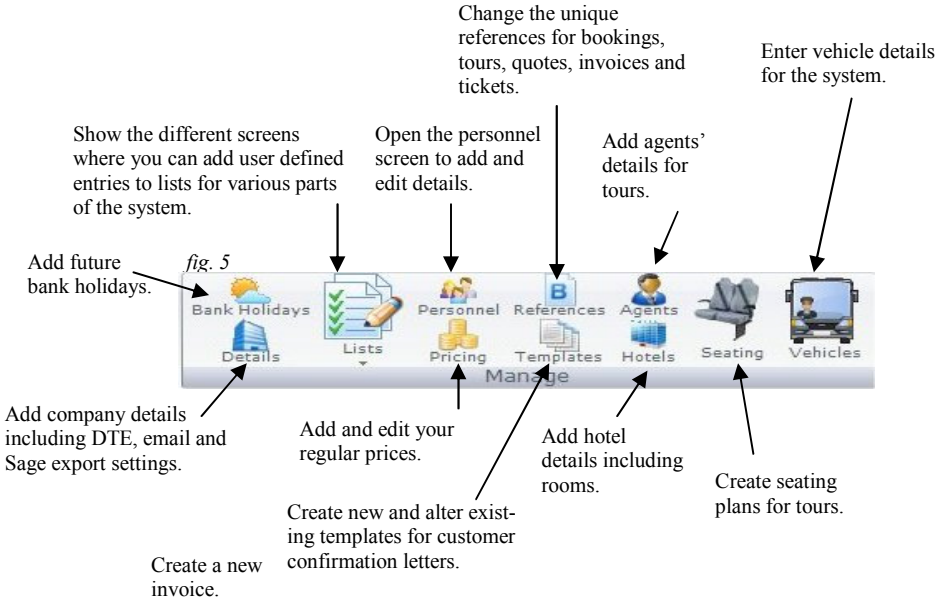
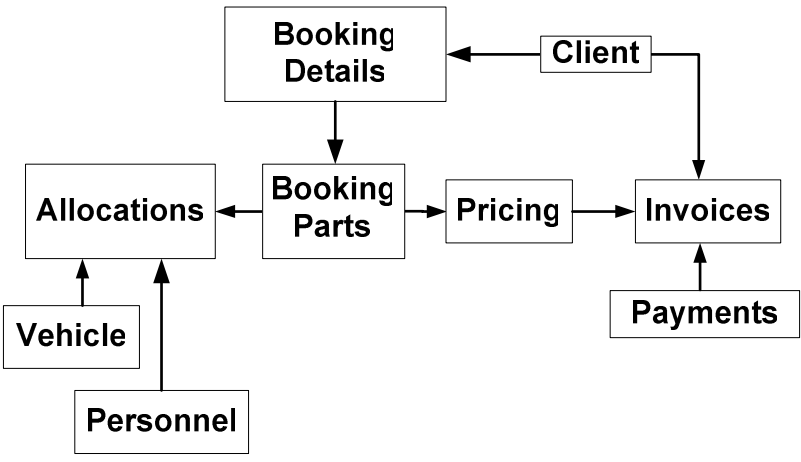
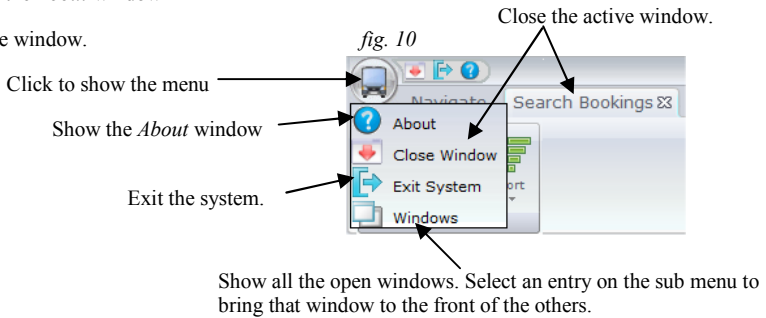
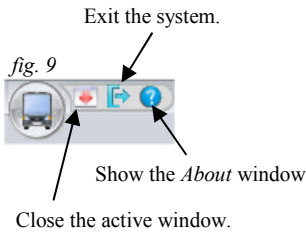


fig. 8



To navigate the system use the following buttons and menus -



## Setting Up

Before you can begin to use the system you must start by entering certain details for the system to work. Below is a list of the items that need to be carried out before you can begin to use the system.

- 1) Create user accounts for people to be able to use the system
- 2) Enter vehicle details
- 3) Enter personnel
- 4) Enter the company details
- 5) Set references for bookings, tours, quotes, invoices and tickets.

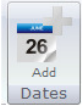
# Manage

The *Manage* section allows you to enter, edit and update all the different items that make up the system.

## ***Bank Holidays***



In this screen you can edit or delete the bank holiday details that are already showing in the list and you can add new ones to the list.



Click on the icon to add a new bank holiday. At the *Add Date* window enter the date and a description. Click on *OK* to place the entry into the list or *Close Window* to return to the main list without making any additions.

To edit or delete a date highlight the item in the list and then, with the right mouse button, click again to show a pop up menu. Select the action from the menu.

Date	Description	
Thu 01 Jan 2015	New Years Day	Edit
Fri 03 Apr 2015	Good Friday	Delete
Mon 06 Apr 2015	Easter Monday	
Mon 04 May 2015	May Bank Holiday	

In the *Edit Date* window make your changes and then click on *OK* to accept them or *Close Window* to return to the main list without making any changes.

Selecting *Delete* will show a confirmation window. If you're happy to proceed with the deletion select *Yes*, otherwise, to cancel the deletion select *No*.

## ***Company Details***



This screen is for putting all the company details in and for selecting how you want your letters and statement printing to look like.

The window is divided into these tabs— Details, Letter Header, DTE, Email Settings and Accounts Export

### *Details Tab*

Use this tab to enter your company details. If you have more than one company on the system use the arrows at the bottom left of the window to move between them.

### *Letter Header*

This tab lets you set whether or not you want to use your logo and company details on plain paper or by deselecting them you can use your own headed paper. If you choose to use them then you can also set where they appear on the page by clicking on an empty square to position them.

If you do use the company details on plain paper then you can change the appearance by selecting a different font and font size.

The client address can also be formatted in a similar way including how much of an indent you want and how far from the top of the page the address should be. This is useful for positioning addresses for window envelopes.



### DTE Tab

The DTE (Don't Travel Empty) tab is used to store your DTE details. By storing your details here the system can then use them to quickly send any bookings to the DTE web site. All entries here are encrypted.

Enter your user name and hash key supplied to you by DTE in the boxes.

### Email Settings Tab

The system only sends emails, it doesn't receive them. To receive emails you will need your usual email client such as Thunderbird or Outlook.

The system needs to know various settings before it can send any emails. If you don't have the required settings to hand then your ISP (Internet Service Provider) will be able to supply them.

#### SMTP Server

The top box is for the SMTP (Simple Mail Transfer Protocol) Server. This entry is normally in the format of smtp.yourispuppliername.com (or whatever the extension is at the end).

#### SMTP Server Port

The port is a numerical value which allows the computer to make connections to external servers. There can be various values for this but once again your ISP will be able to tell you which to use. Common port numbers include 465 for secure SMTP transfers, 143 for IMAP and 25 for simple (unsecured) SMTP.

#### User Name

Enter your User Name as given to you by your ISP.

#### Password

Enter the password given to you by your ISP. You can toggle whether to view the password or to have it hidden on the screen by clicking on the padlock at the side.

#### Use SSL

SSL stands for Secure Socket Layer and allows the exchange of data securely. If your ISP uses SSL for emails this must be checked otherwise no emails will be sent.

### Accounts Export Tab

This tab is for the settings necessary to create a csv file that can be imported into your Sage accounts package if you are using one. You must create a new user and password in Sage and then enter the details in the relevant boxes in the tab. The version of Sage that you are using must also be entered in the top box.

## ***System Lists***



The lists part of the *Manage* section allows you to maintain the entries which make up the drop down lists in various parts of the system. Everything that is to do with a list can be found in this section. Click on the icon and then select a list from the pop up menu that shows.

### **Adding To A List**



This button will show the *Add* screen for each list (except for *Allocate* which shows a colour button). Enter the details of the item that you want to add then click on the *OK* button to add the item or *Close Window* to return to the *Lists* screen without making the addition. The exception to this is the *Allocate* which only allows you to change the colour of the booking type.

### **Editing An Item On The Lists**

Highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the item. Edit the details of the item then click on the *OK* button to add the changes or *Close Window* to return to the selected *List* screen without making any changes. The exception to this is the *Allocate* tab where no edit is allowed.

### **Deleting An Item On The Lists**

Highlight the row containing the item you want to delete then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the item or *No* to return to the selected *List* screen without deleting the item.

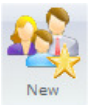
## ***Personnel***



This window allows you to record the details, including absence and holidays, of all the personnel in your company that you use. Once you have entered the names and any other details that you want to store then they will be available to the other screens which use them to plan and allocate people to the work. It will also keep a record of any documents such as warnings etc. in Word form or scanned documents, such as licences, against each user.

Please note that keeping personal details of people will normally require you to be registered with the Data Protection Act.

### **Adding Personnel**

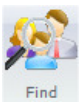


To add an employee or subcontractor click on the *New* button at the top of the screen. A window will show asking whether the record you are about to enter is a subcontractor. This will then show the *Enter New Personnel Details* window. Enter the surname and the forename of the employee and then click on the *OK* icon at the bottom of the window. Fill in the rest of the details on the main screen



as you require and click on the *Save* button on the toolbar. If you decide that you don't want to add a new name click on the *Close Window* icon and the window will close and return you to the main screen without adding a new employee.

### Finding Personnel

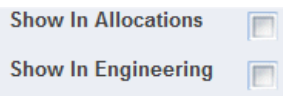


To find an employee click on the *Find* button at the top of the screen. This will show the *Find Personnel* window. You can search for personnel using the *Find* box at the top of the window. Enter your search criteria, including any wildcards, and the list will be reduced as you type. If you have removed personnel from the personnel list you can view them again by clicking on the *Show Removed* checkbox.

Once you have found the staff member double click on the row and that person will show in the main screen.

### Showing Personnel In The System

The system allows you to decide who should be in the lists of two different sections. If you need them to be available for allocating to a vehicle click on the *Show In Allocation* check box to show a tick and similarly if you want them to show in the various lists in *CoachManS V4* then click on the *Show In Engineering* check box.



### Adding, Editing And Deleting Absences

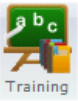


To add an absence click on the *Absence* button at the top of the screen. Select the type from the drop down list and then enter the *Start* and *Finish* dates along with the times. Enter a description and any notes if required. Then select whether it is a continuous or a repeated absence. The difference is in the way that the absence is recorded. For example a holiday would be continuous—it starts on one date and finishes on a later date. Whereas a regular appointment which happens between two times but every day for a set period would be a repeat absence. Click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit an absence highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit Absence* window will show for the absence. Edit the details of the absence then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete an absence highlight the row containing the absence you want to delete then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the absence or *No* to return to the *Personnel* screen without deleting the item.

## Adding. Editing And Deleting Training



To add training click on the *Training* button at the top of the screen. Enter the *Course*, *Location* and *Grade* where applicable and then enter the relevant dates. Click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit training highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the training selected. *Edit* the details of the training then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete training highlight the row containing the training you want to delete, then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the training or *No* to return to the *Personnel* screen without deleting the item.

## Adding. Editing And Deleting Endorsements



To add an endorsement click on the *Endorsements* button at the top of the screen. Enter the details of the conviction and click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit an endorsement highlight the row containing the item you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the endorsement selected. Edit the details of the endorsement then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete an endorsement highlight the row containing the endorsement you want to delete, then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the endorsement or *No* to return to the *Personnel* screen without deleting the item.

## Adding. Editing And Deleting Documents

The personnel documents section of the *Personnel* window allows rapid location of files that are linked with an employee, no matter where they are located on the network. By using this part of the system quick retrieval of a document is possible particularly compared with a manual storage system and its propensity for documents to be lost. As well as this, the latest version of the document will always be available.

The *Person Document* manager works, not by storing each individual document within the system but by recording the path of its location. This allows documents to be stored on a local drive such as a c:\ drive where those documents will only be available to the user or on a network where they will be available to everyone who has access to that part of the network. Pictures, Excel, Word and Visio files can all be stored and quickly retrieved using this section of the system. For example, items such as driving licences can be scanned and stored. The possibilities of this method of storage with its flexibility and speed of retrieval make this a highly useful part of the booking system.



To add a document click on the *Documents* button at the top of the screen. This will show an *Open* window. Select the type of document from the drop down box to the right of *File of Type*. Once you have made your selection navigate to where the document is stored. Once you found the document click on the *Open* button and the address of the document will be stored.

To edit the document details highlight the row containing the document you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit Document Details* window will open for the selection. Edit the details of the an document then click on the *OK* button to add the changes or *Close Window* to return to the *Personnel* screen without making any changes.

To delete a document highlight the row containing the document you want to delete, then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the document or *No* to return to the *Personnel* screen without deleting the item.

### Document File Types

The system has six different file types that it can display : bmp, jpg, wmf, doc, xls and vsd.

bmp – Windows bitmap. A no compression format which allows a high degree of resolution but results in very large sized files.

jpg – Joint Photo Expert Group. A high compression format which results in small file sizes but is sometimes referred to as a ‘lossy’ format which trades file size for some detail loss.

wmf – Windows Metafile. A type of meta format that also allows vector information to be included.

doc – Microsoft Word. A word processor.

xls – Microsoft Excel. A spreadsheet.

vsd – Microsoft Visio. A drawing program.

bmp, jpg and wmf are picture formats in which scanned images, photos etc. can be stored as types of file.

doc, xls and vsd are all Microsoft products. As long as they are installed on your system these files can be viewed and edited.

### Using The Personnel Documents System (only personnel)

The system can be utilised in various ways to restrict access to certain documents, to keep track of the latest versions of documents and drawings, to make sure that the latest version of a document is available to everyone after editing, and to make retrieval of important documents faster than a paper based system.

#### Restricting Access

Access to documents can be restricted by placing them in directories where only certain people have rights to. This allows only those who should have access to view the docu-

ments; all others in the CoachManS system will be denied access. Furthermore, placing the documents on to the local drive of a user restricts access only to the user.

## Tracking Versions

To make sure the latest version is the correct version to use it is only necessary to remove the previous versions from the Document Manager and add the new version.

## Availability After Editing

Whenever a document is edited and saved that document immediately becomes available for everyone to view who has the right to access the document. This means that no-one is working from an out-of-date version and is a useful tool for correct management of documentation.

## Organising Documents


The three picture formats that are available are convenient for the storing of scanned documents. These can be documents such as certificates, driving licences, warning and employment letters, employment records and even photographs of the individual. Once these forms of documents have been scanned in and their paths allocated to the system it allows a very quick retrieval of the correct document.

Internal documents that have been created in Microsoft Word, Excel or Visio can also be organised effectively in a similar manner to allow easy and quick access.

## Retrieval Speed

The system is much faster than a paper based method of keeping documents. The speed of retrieval is increased in the first place as the user does not have to physically leave their workspace in order to find a document. The second reason for an increase in speed is that all documents of all types are joined together under one person rather than distributed over several draws or filing cabinets depending on the type of document it is. This means that it is only necessary to remember the person in order to find the document required.

## Pricing

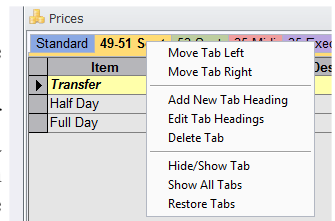
 The *Pricing* screens allows you to create a price list for the system that gives a great deal of flexibility. You can organise bands of prices under headings. For example - you can create a range of headings that reflect your fleet such as 8 Seater, 25 Seater, 49 Seater etc. or even by type of work - Airport, Station, Transfer etc.

### Creating The Tabs

You must create your tabs first (unless you just want to use the *Standard* tab that comes with the system).



Click on the *Tab* button at the top of the screen or click with the right mouse button on a tab to show a pop up menu and select *Add New Tab Heading*. When the *Add Price Heading* window appears enter the



heading name and click on *Add*. This will then place the new tab on to the tab bar at the top of the *Prices* window. You can move, delete, show tabs, etc. quite easily by clicking on the tab section with the right mouse button to show the pop up menu.

### Adding New Prices



Click on the *New* button on the toolbar to show the *Add Prices* window. At the top of the window are two empty boxes. The first one is *Item* which can be a generic term for the description e.g. The item could be “Transfer” which could have descriptions such as “Heathrow to Central London Hotel” or “Manchester to Lake District”. Either type the text into the *Item* box or click on the arrow to show a list of items to select from. The *Item* box can be left blank. Enter a description into the box by *Description*.

Below these boxes is a grid, which on the left hand side shows the list of *Tabs* from the main window. This allows you to enter a price for each *Tab* heading in one go rather than having to do it individually. Simply enter the *Qty.*, *Unit Price* etc. for each *Tab Heading* that you want to use. Any *Tab Headings* which don’t have an entry will not appear in the main pricing.

### Edit A Price

Highlight the price you want to edit and then right mouse click to show a pop up menu and select *Edit Price*. This action will show the *Edit Prices* window. Edit or add prices to the *Heading Tabs* which you want to and then click on *OK* to save the changes.

Item	Description	Qty.	Price	VAT	VAT	Total
Contract	Day	1	£150.00		£0.00	£150.00
▶ Transfer	London Airport	1	£250.00		£0.00	£250.00
Half Day	Sight				£0.00	£250.00
Full Day	Sight				£0.00	£500.00

If you want to raise the prices by a set percentage then click on the *% Change* button to display the *Add %* window. Enter the percentage amount that you want to increase/decrease the prices by and click on the *OK* button.

### Removing A Price

A price can be removed from an individual *Heading Tab* by highlighting the price you want to remove and then right mouse click to show a pop up menu where you select *Remove Price*. The price will be removed from the *Tab* but will still be there for any other

### Deleting A Price

A price and its description can be permanently deleted from the price list by highlighting the price you want to delete and then right mouse click to show a pop up menu from where you select *Delete Description And Prices*. The descriptions and all prices associated with it will be removed.

## Adding And Editing Items



The definitions for items edited or added to by clicking on the *Items* button on the toolbar at the top of the screen. This will show the *Add/Edit Items* window. To add an item click on the *Add* button at the top of the screen. At the *Add Price List Items* window enter you new item and click on *OK* to add the item or *Close Window* to return to the list.

To edit an item right mouse click to show a pop up menu from where you select *Edit*. Enter any changes in the *Edit Price List Items* and click on *OK* to make the change or *Close Window* to return to the list without making any changes.

## Tab Style



Click on the *Style* button on the *Toolbar* at the top of the screen to change the appearance of the *Tabs* on the *Prices* window. Each click will iterate through the possible choices and be saved for each user. Each users preferences are available in all price sections of the system no matter which computer they use.

## **References**



This screen allows you to change the style of the references used in different parts of the system.

## Tabs

The window has five different sections which appertain to the relevant part of the system. The following explanations are applicable to each tab.

### Changing A Reference

At the top will be the old reference used by the system and below that a text box where you can enter the new booking reference. Type in the style of reference remembering to include an \* in the text. The \* tells the system where to insert the unique number that it generates for each booking. If you forget then the system will not allow you to save your new reference.

### Options

*Include Company Initials* - The system will take the initials from the company name entered in the *Company Details* window and add them to the front of the reference automatically.

*Use Leading Zeros* - This tells the system that it should use leading zeros when adding the system generated incremental number to the reference.

*Number Of leading Zeros* - The number of leading zeroes that will be used e.g. entering the number 5 will create a template of 5 zeros "00000" for the system. The first booking created will be "00001".

*Starting Number* - What number you would like the system to start counting from for the unique incremental number.

*Use Current Year At End* - The system add the current year to the end of the reference



automatically.

### Saving A Reference

Every time you change a reference you should save it. The system only saves the reference of the *Tab* that you have selected. To save a reference click on the *Save* button on the toolbar at the top of the screen.

## **Confirmation Templates**



This section is used to create and maintain the confirmation letters that are sent out to clients from the booking section of the system.

### New Templates

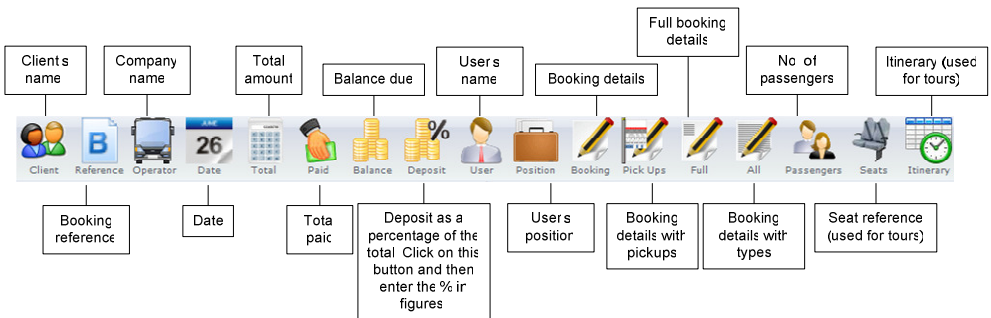


Click on this icon to start a new confirmation letter.

The window bar will show *Template—New Template* to confirm that the system is ready to begin a new template.

Type into the text panel the wording of the template that you want to create. You can either type everything in and then insert the merge items into the places where you want them to appear or you can enter them as you go along with your typing. Merge items are words that tell the system where to enter details such as a customer's name and address, the date, the booking reference, etc., and are entered by clicking on one of the buttons at the top of the window (see below [fig 11] for an explanation of each button). All text can also be modified by using the controls at the top of the window. Text size, text font, text format, text justification and colour are all easily adjusted by making the appropriate choice. Once you are satisfied with your template click on the *Save* icon from where you will be prompted to enter a name for the template. After you have entered a name for the template click on *Save* to save the template. Templates are normally stored in the *Templates* folder with the folder that contains the databases for the system. You can, however, save the templates to wherever you find it convenient.

fig. 11



## Editing Existing Templates



Open an existing template by clicking on this icon.

Select the template you want to edit by clicking on the name in the left hand panel.

The template will now be shown in the right hand window. If you want to edit a template that you have stored elsewhere then click on *Open Template* at the

bottom to navigate to folder containing the templates.

Click on *OK* if it is the correct template. The window bar will show the name of the template as it is opened.

Click on *Close Window* to return to the main screen.

## Copying Existing Templates

To copy a template open it using the method in Editing Existing Templates

Click on the *Save* icon and enter a new name for the template in *File Name*. Once you have entered a name for the template click on *Save* to save the template. You can now edit the copied template as you would like.

## ***Tour Agents***



In this screen you can add or edit the details of any agents that you use to sell your tours and holidays.

## Add An Agent



Click on this icon to add a new agent. At the *Add New Agent* window enter the name of the agent. Click on *Add* to place the entry into the list or *Close Window* to return to the window without making any additions.

## Finding An Agent



To locate an agent click on the *Find* button and at the next window select the agent you want to view by double clicking on the row. The agent's details will now show in the main window.

## Edit An Agent

To edit an agent click on the *Find* button and at the next window select the agent you want to edit by double clicking on the row. The agent's details will now show in the main window. Edit the details in this window and then click on the *Save* button to commit the changes to the database.

## Commission Rates

The commission rates that an agent earns on selling your tours can be set by yourself and can vary depending on the items sold. Simply enter the percentage amount in each box and then click on the *Save* button.

### Adding A Contact



To add a contact to an agent click on the *Contact* button and at the next window add the details of the contact. Click on *Add* to place the entry into the list or *Close Window* to return to the window without making any additions. The contact's details will now show in the list at the bottom of the window.

### Editing A Contact

Highlight the row containing the contact you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the contact. Edit the details of the contact then click on the *OK* button to add the changes or *Close Window* to return to the *Agents* screen without making any changes.

## ***Tour Hotels***



The Hotels section allows you to maintain hotel details and any rooms that you have entered for a tour.

### Add A Hotel



Click on this icon to add a new hotel. At the *Add New Hotel* window enter the name of the hotel. Click on *Add* to place the entry into the list or *Close Window* to return to the window without making any additions.

### Finding A Hotel



To locate a hotel click on the *Find* button and at the next window select the hotel you want to view by double clicking on the row. The hotel's details will now show in the main window.

### Edit A Hotel

To edit a hotel click on the *Find* button and at the next window select the hotel you want to edit by double clicking on the row. The hotel's details will now show in the main window. Edit the details in this window and then click on the *Save* button to commit the changes to the database.

### Adding A Contact



To add a contact to a hotel click on the *Contact* button and at the next window add the details of the contact. Click on *Add* to place the entry into the list or *Close Window* to return to the window without making any additions. The contact's details will now show in the list at the bottom of the window.

### Editing A Contact

Highlight the row containing the contact you want to edit then right mouse click to show a pop up menu. Select *Edit* from the menu and the *Edit* window will show for the contact. Edit the details of the contact then click on the *Ok* button to add the changes or *Close Window* to return to the *Agents* screen without making any changes.

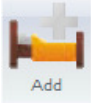
## Deleting A Contact

Highlight the row containing the item you want to delete then right mouse click to show a pop up menu. Select *Delete* from the menu and a window will show to confirm the action. Click on the *Yes* button to delete the contact or *No* to return to the *Agents* screen without deleting the item.

## Adding A Room

Rooms can be added in the *Hotel* section or in the *Touring* section. If a room is added via this section then you must have set up a tour so that a tour reference can be put against the room.

To add a room click on the *Add* button.



At the *Add Room* window select a tour reference by clicking on the arrow to the right of the *Tour Ref.* box. This will show a drop down box offering the option of how many tours to display. Select the number that you want and the system will show the last tour references entered up to the number you selected. Select a tour

reference by clicking on it.

Next enter the *Qty.* of the room that you have from the hotel and then the occupancy. Click on the *Smoking* checkbox if the room allows smoking. The *Qty.* referred to previously shows as the availability or the number of rooms left to assign in the main rooms window in the system. Each time that you add a room to a customer the availability is reduced by that amount and is shown in the main windows.

To enter the description simply type into the *Description* box the details of the room. Select a room icon by clicking on the arrow to the farthest right of the description box to reveal the icon list. Select an icon by double clicking on it.

Alternatively click on the nearest arrow to the end of the *Description* box. This will open another window which will have a list of all previously entered hotel room descriptions with the icons chosen. Double click on the description required and the details will be entered into the *Description* box.

If the room comes with items such as breakfast, dinner, full board or indeed anything else then these details can be typed here in the *Includes* box. Previous entries can be found by clicking on the arrow to the right of the *Includes* box to show a window. Double click on the description required and the details will be entered into the *Includes* box.

Enter the arrival date and then in the *Nights* box enter the number of nights for the room. The system will calculate the departure date. You can also enter the departure date into the *Depart* box and the system will work out the number of nights.

The cost of the room once entered will allow the system to show the room cost as per person per night (PPPN box) and per room per night (PRPN box).

If this room price is to be shown in the price list for the tour then click on the *Show* checkbox.

When you are satisfied with the entry click on the *Add* button to enter the details into the system.

## *Seating Plans*



The *Seating Plans* screen allows you to create the layout of seats, tables, amenities and most other items associated with a vehicle plan so that they can be used with the *Tours* part of the system. Fully flexible and easy to use, the screen allows various permutations including rear and side facing seats, driver and courier seats, toilets, refreshment areas, televisions, tables and even sofas and beds.

### *New Plan*



To enter a new plan click on the *New* button on the toolbar at the top of the screen. This will show the *New Plan* screen. Enter the plan name, the number of rows, the vehicle width (including the aisle—e.g. 4 seats abreast would be a width of 5) and the number of decks.

### *Opening An Existing Plan*



To open a plan click on the *Open* button on the toolbar at the top of the screen. This will show the *Select Plan* screen. Select a plan and then click on *OK*.

### *Saving A Plan*

To save a plan click on the *Save* button on the toolbar at the top of the screen.

### *Deleting An Existing Plan*



To delete a plan click on the *Delete* button on the toolbar at the top of the screen. This will show the *Select Plan* screen. Select a plan and then click on *OK*. At the confirmation screen click on *Yes*.

### *Show Or Hide The Seat Grid*



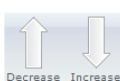
Click on the *Grid* button on the toolbar at the top of the screen. This will either hide or show the gridlines in the plan area.

### *Filling A Plan With Seats*



If the plan is empty, such as a new plan, it can be quickly filled with seats by clicking on the *Fill* button on the toolbar at the top of the screen. At the same time as the seating is created they will also be numbered in the traditional format across the rows.

### *Decreasing And Increasing The Number Of Rows*



The number of rows can be increased or decreased by using the *Decrease* and *Increase* buttons on the toolbar at the top of the screen. You cannot decrease the rows beyond the last row if seats exist in the plan.

## Numbering Seats



To renumber the seats click on the *Seats* button on the toolbar at the top of the screen. From the window that shows select the layout type you would like to use and click on *OK*. Click on *User Defined* if you want to renumber the whole layout manually.

To renumber a seat manually right mouse click on a seat to show a pop up menu. Select *Number* and at the next window enter the alphanumeric characters that you want to use as the seat number.

## Erasing The Seat Numbers



To erase all the seat numbering click on the *Erase* button on the toolbar at the top of the window.

## Erasing A Single Seat Number

To erase a single seat number right mouse click on a seat to show a pop up menu. Select *Remove*.

## Removing All The Seats



To remove the seats click on the *Remove* button on the toolbar at the top of the window.

## Removing A Single Seat

To remove a single seat right mouse click on a seat to show a pop up menu. Select *Delete*.

## Adding Items To A Plan



To add an item to the plan click on the required item to the left of the screen. The mouse icon will change to represent the item selected. Move the icon selected across to the plan and put it in the position on the grid where you want it to be. Click again with the left mouse button and the item that you selected will be 'dropped' onto the grid.

After an item has been entered onto the grid the mouse icon will stay the same

allowing you to make multiple entries onto the grid without having to select the same item

each time (unless you take the mouse icon outside of the grid where it will revert to the normal pointer).

When the grid is showing any items dropped will automatically align themselves to the grid. Turn the grid off if you want to place them differently.

### Moving Items

Items that have been placed on the grid can be moved by clicking on them with the left mouse button. This will highlight the item with a solid blue line. Keep the left mouse button pressed down and move the mouse to the area where you want to reposition the item. As you drag the mouse across the screen the blue highlight will follow the mouse.

When you reach the new position for your item release the mouse button and the item will be placed at the selected point.

How the item behaves when dropped on the layout area will depend on whether you have the *Grid* on or not. With the *Grid* on the system will align anything that you have released to the nearest grid division. If the *Grid* isn't on the then the item will be placed exactly where it was left.

### ***Vehicle Details***



The *Vehicle Details* screen allows you to enter your fleet into the system for use with the *Allocations* part of the system.

### Adding A Vehicle



Click on the *Add* button on the tool bar at the top of the screen. Enter the registration number and the number of seats. The *Show In List* checkbox defaults to checked when the window opens. If you don't want that vehicle to immediately show in any vehicle listings then uncheck this box.

### Showing All Vehicles

Clicking on the *Show/Hide* button on the tool bar at the top of the screen will show or hide vehicles that have been set not to show in lists. This enables you to edit and to reset the show in list setting for a vehicle.

### Remove From List

To quickly remove a vehicle from the lists highlight the row with the vehicle you want to change and then right mouse click to show a pop up menu. Select *Remove From List*.

### Edit A Vehicle

Highlight the vehicle you want to edit and then right mouse click to show a pop up menu. Select *Edit* to action will show the *Edit Vehicle* window. Make any alterations to the vehicle and then click on *OK* to save the changes.

# Bookings



The Booking section allows the creation of private hires, contracts, tours and quotes and the ability to easily find an entered booking.

## *Search*



Existing bookings can be located using the *Search* screen. All the booking types are shown in this window. Once a booking has been found using one of the methods below simply double click on the booking to open it in the correct window.

### *Finding Bookings*

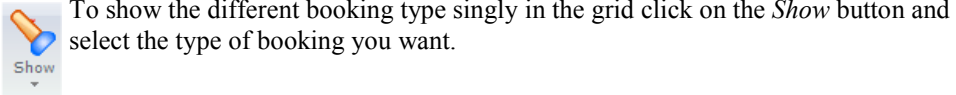
To show all bookings between two dates change either the *From* date or the *To* date or both by clicking on the arrow to the right of the box and selecting the date from the calendar.

Bookings can be shown by their booking reference by entering criteria into the *Ref.* box. As you enter text into the box all the records will be shown whose booking reference matches the text entered. Wild cards can also be used to open up the search (see *appendix ii*).

A booking can be found by the client surname or company name. Entering the search text details into the *Client* box and the screen will be updated with all the bookings whose clients match the text entered. Wild cards can also be used to open up the search (see *appendix ii*).

A booking can also be found by its start position or destination. Simply by entering the details into the *Position* or *Destination* box the screen will be updated with all the bookings which match the text entered. Wild cards can also be used to open up the search (see *appendix ii*).

### *Show Bookings Types Individually*



To show the different booking type singly in the grid click on the *Show* button and select the type of booking you want.

### *Show Bookings In Colour*



Each booking type has its own colour which can be shown in the grid by clicking on the *Colours* button at the top of the screen.

### *Sort Bookings*



To sort the grid with bookings in it click on the *Sort* button and select the direction of sort and from the sub menu which column you want the grid to be sorted on.



## ***Booking***



The *Bookings* screen is where you create *Private Hire and Contracts*.

### ***Entering A New Booking***



Click on the *New* button on the tool bar at the top of the screen. A unique reference will be entered at the top of the window based on the reference style that you created in the *Manage* section. You can then select the type of booking by clicking on one of the choices next to the *Booking Reference* box. Select either *Private* or *Contract* depending on the work that you are doing.

### ***Entering A New Booking From A Client's Enquiry***

If you have an enquiry form on your web site and it is configured as per *appendix v* then you can copy and paste the email and with a single click enter all the details as a new booking.



Click on the *Email* button on the tool bar at the top of the screen. This will show the *Add Email* window after a confirmation popup window. Right mouse click in the centre panel and select *Paste* from the popup menu. This will paste your client's email into the centre panel. Click on *Create New Booking* and the details will be entered as a new booking. If you don't want to create a new booking click on *Close Window* to return to the main screen.

**N.B.** the enquiry must be in the format shown in *appendix v*. This may mean that you would have to adjust your web form to respond in the format required by the system.

### ***Saving Changes***

To save changes you make to a new or existing booking click on the *Save* button on the toolbar at the top of the screen.

### ***Deleting Bookings***

To delete a booking click on the *Delete* button on the toolbar at the top of the screen. If you have assigned the booking to an invoice you will not be permitted to delete it.

### ***Print Booking***


To print the details of the booking for internal use click on the *Print* button on the toolbar at the top of the screen.

### ***Copy Booking***




To make a copy of the booking click on the *Copy* button on the toolbar at the top of the screen. You will then be asked to select options from the Copy Options window. Select the date that you want the copy to begin and each part date will be offset by the number of days between the date that you entered and the date of the original.

## Booking Details Tab

 **Booking Details** Enter the details as required in the window. To show the status of any work click on the *Arrow* to the right of the box to show a drop down list. Select a status by clicking on it with the mouse button. The *Status* tells the system what type of booking it is. For example a booking can be '*Firm*', '*Cancelled*' or '*Provisional*'. You can also add and delete your own statuses via the *Manage* section.

The *Additional Booking Information* box allows you to enter confidential information regarding the booking which will not be printed out anywhere a client may see it, Similarly, the *Additional Work Ticket Information* box will allow the entry of text that will


## Booking Parts

 **Booking Parts** Each booking can be made up of several parts although the most common jobs will require only one part. The advantage of this method is that complicated work such as a wedding which involves, for example, collecting guests from the railway station and taking them to the church, then from the church to the reception and finally from the reception back to the railway station can be very easily created in three parts. So instead of having to create complicated pick ups and set downs or making three separate bookings everything is simply contained in the one booking. Each part can then be allocated to the same or different drivers and vehicles. Similarly, a contract booking will have the same details for a part but on several different days, all of which can be effortlessly formulated.

For a diagrammatical view of the relationship between booking, parts and other items please see *appendix i*).

When you start a new booking the first part will always be created.

### Adding Parts To A Booking

 If you need to add more parts to the booking click on the *New Part* button on the toolbar at the top of the screen. This will add another part below the last part in the grid.

### Entering and Editing Addresses And Details To A Part

Select a part to enter the start position (*Position*) and destination by clicking on the row in the grid to highlight it. The *Start Position* and *Destination* boxes below the grid will show any details already entered.

To enter an address start on the top line. As you type an address into the box the system will attempt to match it with one of the existing addresses that you have already stored. If the address is not one of your stored addresses just carry on typing and the system will ignore any further input once it cannot find a match.

Another way to enter an address from any existing addresses that you have saved is by clicking on the *House* (see *fig. 12*) button to the right of the top line. This will show a list of all the stored addresses that you have saved. Scroll down the list or use the *Find* box at the top of the window to locate the address that you want and then double click on it to

enter it in the window. If you have purchased the *Postcode* data then you can click on the letter and find and enter an address by using just the postcode. To enter a client's address click on the *People* button to the right of the address boxes.

Any address that you have entered can be saved or stored in your list of addresses by clicking on the *Floppy Disc* button to the right of the boxes.

*Start Position* and *Destination* notes can be entered click on the *Notes* button to the right of the address boxes and will show on the work tickets.

To add flight information to the part click on the *Aeroplane* button to the right of the address boxes which will show on the work tickets

*Start* and *Arrive* are the dates and times that the vehicle is expected to depart and arrive for the booking. The *Return Depart* and *Arrive* boxes are only shown in the window when the *Return* check box has been clicked on. All dates and times must be entered where required for the system to be able to accurately portray the activities in the various screens. You can manually enter dates and times into the box or select an date or time by clicking on the *Calendar* button or the *Clock* button.

Select the type of part by clicking on the *Single* or *Return* checkbox. If you select *Single* the system will remove the return dates from the screen and the system will treat it as a single 'outward' booking with the *Stay At Site* option set to *No*. Selecting *Return* allows return dates to be specified.

If the vehicle is to stay on the site between the outward and return activity click on the *Yes* check box. This will tell the system that the vehicle is not available between the outward and return activities.

Each part can have a different number of vehicles allotted to it. To increase/decrease the number click on the + and - signs to the right of the *No. Of Veh.* box.

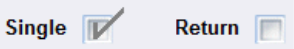


fig. 12

Select an address from a stored list.

Find an address from a postcode (only if the postcode licence has been purchased)

Store an address that you've just entered.

Enter flight details.

Enter notes.

Enter the address of a client.

## Adding Email Details To An Existing Booking

Click on the *Parts* tab and highlight the part you want to add an address or date/time to. The part will be highlighted in yellow and the text will be italicised. The part can be blank or already have entries. Any entries will be overwritten. Right mouse click on the part and from the popup menu select *Add Email Details To Part*. The *Add Client's Email Details To Booking* window will be displayed. Paste any details you have into the respective boxes. It is not necessary to have an entry in box.

If any of the addresses are in the form of a single line with only spaces between each part of the address such as -

*A Street B Town, C County Postcode*

then you must manually enter a comma between each part of the address -

*A Street, B Town, C County, Postcode*

If you don't use a comma to separate the parts then everything will be saved to a single line.

If the address is in the form-

*A Street*

*B Town*

*C County*

*Postcode*

Then the system will not ordinarily have a problem with it.

See *appendix vi* for date formats that can be used.

## Adding Prices With Dates And Addresses

Prices using *Booking Type*, *Start Positions* and/or *Destinations* can be added using the *Booking Parts* tab. To add pricing highlight a row by clicking on it with the left mouse button and then click on it again with the right mouse button to show a pop up menu. From the menu select *Add Description To Pricing*. This will show a further menu with options -

*Booking Type*

*Destination*

*Start Position And Destination*

*Vehicle Type And Destination*

*Vehicle Type And Destination*

*Vehicle Type Start And Destination*

Selecting one of these options from the menu will open the *Add Price* window. The *Description* box will be filled depending on the option chosen. Further to that at the side of the *Description* box is a button showing a blue plus sign. Clicking on this button will show the *Add Description* window where you can select further options to show in the *Description* box. If you want the description in a certain order then you must select the option you want and click on *OK* and then open the *Add Description* window again.

## Deleting Part Of A Booking

To delete a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Delete* from the menu and click on *Yes* at the confirmation window.

### Copy A Part

To copy a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Copy* from the menu.

### Copy And Reverse A Part

If required a part can be split into two different parts comprising separate details for an outward part of the journey and a return part. However, it should be noted at this stage that this action cannot be reversed. Single, start and finish journeys cannot be split. The advantage with splitting a part is that the part will appear as two separate and individual entities. This can be useful when a booking has two different dates for the outward and return parts of the booking e.g. airports where the return pick up will be different date.

To split a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Copy Reverse* from the menu.

### Go To A Part By Date



If you have a booking with a large number of parts, such as a contract hire, then you may need to find a part by date. Click on the *Go To* button at the top of the screen. The *Select Date* window will show. Navigate to the required date and double click on it to be taken to the correct part.

### Move A Part To A Different Position

Occasionally you may have need to move a part up or down the list. Click on the row to highlight it and then right mouse click to show a pop up menu and select *Move Up* or *Move Down* from the menu. This will place the part one position above or below depending on your selection.

### Change The Start Position Or Destination Of Selected Parts

If you need to change the start position of more than one part then select those parts that need changing and then right mouse click to show a pop up menu. Select *Change Start Address To Selected Parts* or *Change Destination Address To Selected Parts*. Enter the address at the next window by entering the details straight into the boxes or, by clicking on the *House* button, using the drop down list or by entering the postcode by clicking on the *envelope* button. Click on the *OK* button and all the selected parts will be updated with the new details.

### Delete Selected Parts

If you need to delete more than one part then select those parts that need deleting and then right mouse click to show a pop up menu. Select *Delete Selected Parts* from the menu and at the confirmation window click on *Yes* to continue with the deletion or *No* to return back without making any changes.

### Create A Start And/Or Finish For A Part

If you want to include the journeys from your yard and back again this can be easily achieved by highlighting a part and clicking on it with the right hand mouse to show a popup menu. Select *Create Yard To Start* if you want to show a journey from your yard to the position address. The system will automatically take the start time of the part and use it

## Page 26

for the arrival time of the *Yard To Start* part. It will automatically deduct 15 minutes from the start time of the part to allow for positioning. Select *Create Destination To Yard* to show the journey from the last position to the yard. If the part is a return then the *Position* address will be used. If it only a single part then the *Destination* address will be used. Select *Create Yard Start And Destination* to create both types in a single action.

### Show/Hide Distance



To show or hide the distance column and total click on the *Distance* button on the toolbar. The total distance of all the parts will be shown in the *Total Distance* box. The system will remember your choice and when you come to open the window again the view will default to your selection. This won't affect anyone else's view of the screen

### Show/Hide Time



To show or hide the total duration of all the parts click on the *Time* button on the toolbar. The total time of all the parts will be shown in the *Total Duration* box. The duration is calculated from the start and finish times of each part. It does not include any time from the end of an out journey to the beginning of the return journey whether or not a vehicle has to stay at the site. The system will remember your choice and when you come to open the window again the view will default to your selection. This won't affect anyone else's view of the screen

### Create A Distance Or Time For A Part

Highlight the part that you require to have the distance or time or both. Click on the highlighted part with the right mouse button. From the pop up menu select *Send Address To Google*. This will send the address details you have entered to your default browser and open up Google maps. If any details of an address are not correct it is unlikely that you will get any information back. You can enter any distance or time details into the system by highlighting the distance or time in the directions panel of Google and selecting either *Paste Distance*, *Paste Distance To All Parts*, *Paste Time* or *Manually Enter Distance And Time* from the pop up menu when you right mouse click on the part.

#### Paste Distance

This will just paste the distance to that part.

#### Paste Distance To All Parts

All parts of the booking will be updated with the distance. This is useful for when you have a booking with lots of the same part such as a contract.

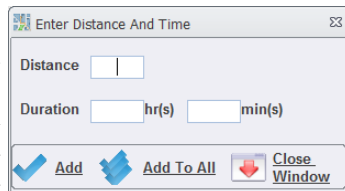
#### Paste Time

Select this from the pop up menu to enter the time into the system. The system will calculate the arrival time of both the outward and return part of any part.

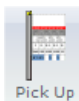
#### Manually Enter Distance And Time

If required you can manually enter the distance and time by selecting this from the pop up menu. This will show the *Enter Distance And Time* window. You can enter just the distance or the time or both into the window. When you have entered the figures click on *Add* to add it to the highlighted part or *Add To All* to add to all parts of the booking.

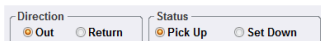
Please note that timings and distances cannot be exact. All distances and timings are supplied by a third party and there are many other factors that have to be taken into account such as weather and hold ups both of which cannot be calculated. If the timing is greater than four and half hours then an extra 45 minutes is automatically added for the statutory rest period. If you are unsure about any distances or timings then you should double check and if necessary manually enter the figures..



### Adding Pick Ups/Set Downs To A Part



Each part can have pick ups and set downs assigned to it which gives a large amount of flexibility to a booking. Multiple parts with associated pick ups/set downs means all types of work can be accomplished. To add pick ups and set downs to the part selected click on the *Pick Up* button on the toolbar at the top of the screen or right mouse click on Pick Ups and Set Downs grid at the bottom of the screen to display a pop up menu and select *Add* to show the *Add Pick Up/Set Down* window.



Click on the direction of travel and then on the status. Enter the details in the *Details* box. Click on the *Envelope* button to use a postcode (if you have purchased the postcode licence) to enter an address or the *Pickup* button to use details that you have entered before. Put in the times of arrival and departure and the number of passengers if required. Finally enter any instructions for the personnel to follow. Click on the *Information* button to use previously entered instructions.

Click on *OK* when you have finished. The window will not close but will clear the boxes ready for another entry. To close the window click on *Close Window*.

### Adding Pick Ups/Set Downs To Selected Parts

If you need to add a pick up or set down to different parts then select those parts that need adding to and then right mouse click to show a pop up menu. Select *Add Pick Up/Set Downs To Selected*. To add the pick up/set down details see Adding Pick Ups/Set Downs. Click on the *OK* button and all the selected parts will be updated with the new details.

### Edit A Pick Up/Set Down

To edit a pick up/set down click on the row to highlight it and then right mouse click to show a pop up menu and select *Edit* from the menu.

### Copy A Pick Up/Set Down

To edit a pick up/set down click on the row to highlight it and then right mouse click to show a pop up menu and select *Copy* from the menu.

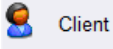
### Insert A Pick Up/Set Down

To insert a pick up/set down click on the row to highlight the *Pick Up/Set Down* that you want to insert the new pick up above and then right mouse click to show a pop up menu and select *Insert* from the menu.

### Move A Pick Up/Set Down

To move a pick up/set down to a new position click on the row to highlight it and then right mouse click to show a pop up menu. Select the required command from the menu.

## Client



The *Client* tab shows the details of the client that has made the booking along with a log of contact with the client. Prices cannot be added to the booking without a client having been entered.

### Adding An Existing Client



To add an existing client click on the button marked *Client* on the toolbar at the top of the screen. This displays the *Find Clients* window.

To find a client you can either enter the client ID in the left hand box or to find by name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be entered in the *Client* panel. If you want to search all the entries for any occurrence of the search string place an asterisk before the character in the box e.g. - \*gr. Wildcards are also supported by the entry box (see *appendix ii*).

### Adding A New Client

If the client is new and not on your existing client list then you can add the new client's details at this stage without having to return to another screen. To add a new client click on the *New Client* button on the toolbar. This will display the *Add A New Client* window. In the *Client Ref.* box at the top of the window enter a unique reference for the new client. If that reference already exists then the system will automatically append a number to the end of the reference to create a unique identifier. Alternatively, if you click on the button to the right of the box after entering the details of the client the system will automatically create a unique reference based on the client's name. Enter the rest of the client's details in the boxes provided to complete the client's record. Apart from the *Forename* and *Surname* of a client none of the remaining fields are mandatory so if there are unknown parts to the client's details then these can be omitted. If all the details are correct click on the *OK* icon to add the details to the system or click on the *Close Window* icon to return without adding anything.



### Editing A Client

Any client's details that are showing in the client section can be edited by clicking on the edit button on the toolbar at the top of the screen.. This will show the *Edit Client Details* screen. You can change and add details in the same way as you would add a new client. Details changed via this window are permanent.





### Copy A Client's Address

To copy a client's address for use in another program such as Avery Labels, click on the *Copy Address* button on the toolbar at the top of the window where the address details will be saved to the clipboard and can be pasted into another program later.

### Printing A Confirmation

The system can automatically create confirmation letters based around pre-existing templates which use the information you have entered into the booking screen. Included within the system are some templates that have already been created for you to use. If these are not suitable for your needs or do not fit all the booking types that you have then the system also allows you to create your own templates via the *Manage* section.

To start a new confirmation letter for a client click on the *Confirmation* button on the toolbar at the top of the screen. This opens the *Select Confirmation Template* window. This window shows all the templates that are available for you to use. You can view templates in the right hand panel by clicking on the template that you want to view. If you have stored templates in another location click on the *Open Template* button at the bottom of the window to navigate to the folder where they are stored. When you have made your choice click on the *OK* icon at the bottom of the window or click on *Close Window* if you don't want to go any further.

Clicking on the *OK* icon or text displays the *Print Preview* window where you can see what the letter will actually look like with all the booking details entered. Within this tab you can select different pages and alter and adjust sizes.

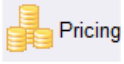
To print and other actions click on the *Print* tab. With this tab you can also edit or enter text into the confirmation letter by clicking on the *Edit* button on the toolbar at the top of the screen. This text may be something unique to the client such as - "Include 2 Child Seats". If you are satisfied with the content then you can print it out by clicking on the *Print* button at the top of the window. You can also email the letter to a client by clicking on the *Email* button at the top (you must have your email settings entered into the system) and you can save the letter by clicking on the *RTF* button which is also at the top of the window. This will save it as a file which can be opened at a later time and printed if required. The letter is saved as an RTF (rich text format) file which means that it can also be read and edited by any program that can import RTF files. Typical programs would be word processing programs such as Microsoft Word. Click on PDF to save it as a PDF format document which can be attached to an email.

### Adding A Log To The Client



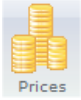
Click on the *Log* button to add any customer contacts by telephone, e-mail, letter etc, This allows an accurate record of all interactions with a client to be kept.

## Pricing



The pricing tab permits a very flexible way of adding prices to a booking. Not only can you select prices from a pre-determined price list created by yourselves but also freeform pricing is easy to add allowing non-standard prices to be entered.

### Adding A Price From The Price List



Click on the *Prices* button to add a price to the booking. If you have created tabs (see *Manage*) then select the tab you require to show the list of prices that you have set up under that heading.

The simplest way to add a price is to double click on the row containing the price. This will then enter that price into the grid on the main window.

If you need more than the default quantity of 1 then you can change the amount by clicking in the *Qty.* column and typing the number requires or by clicking on the arrow to the right you can select a quantity from the list that is shown.

There are further options available to the way that the prices are described in the main window. To view the alternatives highlight a row by clicking on it using the left mouse button and then right mouse click to show a pop up menu. The actions of the menu are described as follows.

#### *Add Price With Tab Description*

This will place the tab description before the price description in the main window. For example - if the tab has a heading of “16 Seater” and the price description is “Full day sightseeing” then the description in the main window will be “16 Seater Full day sightseeing”.

#### *Add Price With Destination*

The destination of the *Part* that was last selected under the *Booking Parts* tab will be entered at the end of the description. As an example - if the destination of the part was “Grantham Hotel” and the price description is “One way” then the description in the main window will be “One way to Grantham Hotel”. Please note—you **must** select the part in the *Booking Parts* tab to use this feature.

#### *Add Price With Start And Destination*

The start position and the destination of the *Part* that was last selected under the *Booking Parts* tab will be entered at the end of the description. As an example - if the start position was “East Midland Airport” and the destination of the part was “Grantham Hotel” and the price description is “One way” then the description in the main window will be “One way East Midland Airport to Grantham Hotel”. Please note—you **must** select the part in the *Booking Parts* tab to use this feature.

#### *Add Price With Tab Description And Destination*

This will place the tab description before the price description and the destination of the *Part* that was last selected under the *Booking Parts* tab will be entered at the end of the description. As an example - if the tab has a heading of “16 Seater” and the destination of the part was “Grantham Hotel” and the price description is “One way” then the description in the main window will be “16 Seater One way to Grantham Hotel”. Please note—you

**must** select the part in the *Booking Parts* tab to use this feature.

The window does not close after each selection is made. Once you have finished entering the required prices you must close the window by clicking on the *X* in the top right hand corner.

### Adding A Free Form Price

Free form pricing allows you to enter prices that are not in any price list that you have set up. It gives a flexibility for those one off pricing situations that are not catered for with set price lists. Click on the *Freeform Prices* button to add a price to the booking.



If you need to put the price against a particular part then select the part from the drop down list at the top by clicking on the arrow to the right.

Enter the *Item* for the price either by typing into the box or by clicking on the arrow to the right and selecting from the list. Beneath the *Item* enter a description into the *Description* box.

Enter the *Qty.* and then the unit price into the *Price* box. This will show a sub total in the box below.

Enter any discount as a percentage in the box below.

Finally enter any *VAT* and when you are satisfied that the price is correct click on *OK* to add the price to the main grid.

The window will clear and be ready for you to enter another price. Click on the *X* in the top right hand corner to close the window.

### Edit A Price

To edit a price highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

### Increase/Decrease Quantities In The Grid

You can make changes to the quantities of a price without having to use the *Edit* window with either of the following methods. First highlight the row containing the price by clicking on it.

Right mouse click on the row to display a pop up menu. Select *Qty. +1* or *Qty. -1* and the quantities will be incremented or decremented by 1.

Click on the *Qty.* column and then click on the arrow to the right. Select the quantity from the list and the price will be updated to reflect the change.

Double click on the quantity to highlight it and then type in the quantity needed.

### Add A Discount To A Price In The Grid

You can add a discount as a percentage to a price without having to use the *Edit* window with either of the following methods. First highlight the row containing the price by clicking on it.

Click on the *Disc. %* column in the row you want to edit. This shows an arrow to the right of the column. Click on the arrow to show a list of discounts which you can apply Select the discount from the list and the price will be updated to reflect the discount entered.

Double click on the discount to highlight it and then type in the discount needed.

### Apply A Discount To All The Prices In The Grid

Any discount that you have entered can be applied to the whole of the list of prices. First highlight the row containing the discount that you want to apply by clicking on it. Right mouse click on the row to display a pop up menu. Select *Apply This Discount To All Prices* and the pricing will be updated.

### Set A Price To A Part

All prices can be set against a particular part. This can be useful if you want to breakdown the charge by part or add sub totals to the notes for collection by the driver. To set the part first highlight the row containing the price by clicking on it and then click on the arrow to the right. Select the part from the list and the price will be updated to reflect the choice. To remove a part from a price highlight the row and right mouse click to show a popup menu. Select *Remove Part Number From Price* and the link to the part will be removed.

### Apply A Subtotal To A Booking Part Note

First click on a price that is part of the sub total to highlight it and then right mouse click to display a pop up menu. Select *Apply Subtotal To Part Note* from the menu and the price will be added to the notes section of that part and will be printed on the *Work Ticket*.

### Apply A Total To The Work Ticket

The total price of the booking can be entered onto the *Work Ticket* in the *Additional Details* section by clicking on any price to highlight it and then right mouse click to display a pop up menu. Select *Apply Total To Work Ticket Information* from the menu and the price will be added to the *Additional Work Ticket Information* section of the *Booking Details* tab and will be printed on the *Work Ticket* under *Additional Details*.

### Apply A Price To All Booking Parts

If you have a booking with a large number of parts, such as a contract, then rather than having to enter the price for each part you can simply add a price to one part and then assign it to all parts. First click on the price to highlight it and then right mouse click to display a pop up menu. Select *Apply This Price To All Parts* from the menu and the price will be added to all the parts.

### Delete A Price

To delete a price highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Delete* from the menu and select *Yes* from the confirmation window.

### Add A Payment

To add a payment click on the *Payments* button on the toolbar at the top of the screen to show the *Add Payment* window. Enter the date in the *Date* box. Enter the amount in the *Amount* box. To enter a method of payment click on the arrow to the right of the *Method* box and select a method from the list that is displayed. Similarly, select the type of payment, the payment description and the Invoice Number (if applicable) from the drop down lists. Enter any notes about the payment into the *Notes* box.

When you are satisfied with the entries click on the *OK* button to set the payment against the booking and the payment will be shown in the lower grid.

Payments can be set against invoices created for this booking by a right mouse click on the payment to display a pop up menu. Select *Add Payment To Invoice* from the menu and select the correct invoice from the window. Any payments that are entered using this screen can be assigned at a later stage to an invoice via the *Payments* screen.

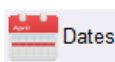
### Edit A Payment

To edit a payment highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

### Add An Invoice

An invoice can be created for a booking without having to use the *Invoice Section* (however, invoices can only be edited and printed using the *Invoice* section). First select the prices that you want to include within the invoice. Use the *Select* button on the toolbar at the top of the window to select every price in the grid. Click on the *Invoice* button on the toolbar at the top of the screen. At the confirmation window that appears select *Yes* to continue. At the *Add New Invoice* window that opens enter the details. At the *Payment Due* box select the type of invoice for when the amount is due. This could be Paid In Full, Pre Paid, No. of days, etc. Click on the arrow to the right of the box to show a list. Click on the required entry and the selection will be entered into the *Payment Due* box. The number of days will also be entered into the *Due Days* box when applicable and the due date will be calculated and entered into the *Due Date* box.

### Dates



The *Dates* tab is in the form of a calendar and shows the dates that have been assigned to the parts that make up the booking. Only the start dates are shown, therefore any bookings that are greater than one day will only show their beginning dates. You should use the *Diary* screen for an accurate picture of date spreads, You can also set up contracts and other booking types that involve repeating elements such as school runs.

### Make Copies To Individual Dates

Simply click on a date with the mouse and that date will turn to a pale orange to show that it has been selected. Click on as many as you need to make a specific set of dates.

To make a regular set of dates such as a swim run that only takes place once a week then click on the start date with the mouse which will turn that date to a pale orange. Right mouse click on the date and choose *Weekly Repeat* from the menu. At the next window enter the from and to dates and click on the *OK* button.



To make the copies click on the *Copy* button on the toolbar at the top of the screen. The *Make Copies* window will open and show a list of all the parts that have been created for that booking. Select a part and then click on *Copy*. For each entry you have made a copy of the original will be created for it.

### Making Copies In Blocks

Simply click on a date with the mouse and the shift key depress and that date will turn to a pale orange to show that it has been selected as the start of the block. As well as this the mouse cursor will turn to an arrow facing two lines. This denotes that you are in block mode. Keep the shift key depressed and click on the date where you would like the block to end. The system will then fill in between the dates selected. To make the copies click on the *Copy* button on the toolbar at the top of the screen. The *Make Copies* window will open and show a list of all the parts that have been created for that booking. Select a part and then click on *Copy* or *Copy No Weekends*. If you select the latter then all the copies will be made on all dates except weekends, the former will add copies to every date selected. For each entry you have made then a copy of the original will be created for it.



### Remove Selected Dates

To remove a single selected date right mouse click on the date and choose *Remove* from the pop up menu. To remove a range of selected dates right mouse click on a date and choose *Remove Between Dates* from the menu.

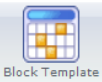
### Excluding Dates

To exclude a range of dates on the calendar such as school holidays, half terms, click on the *Block* button on the toolbar at the top of the screen. Enter the *From* and *To* dates and give the exclusion a name so that you can find it easily again if you want to re-use the same dates on another booking. Click on the *OK* button at the bottom of the window and those dates will appear on the calendar.



### Using Existing Exclusion Dates

To use an existing range of exclusion dates click on the *Block Templates* button on the toolbar at the top of the screen. Highlight an entry from the list and then click on the *Add* button at the bottom of the window and those dates will appear on the calendar. Note that any exclusion dates that you have set up for the current booking will not show in the list.



### Deleting An Exclusion Date

To remove an excluded date right mouse click on the date and choose *Delete* from the pop up menu.

## Touring

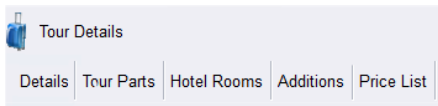
The *Touring* section allows the creation of tours, including, where required, hotels, insurance, excursions.

The screen has two tabs-Tour Details and Clients. You use the *Tour Details* tab to create and maintain a tour and the *Clients* tab to add and maintain the clients for the tour.



## Tour Details

Click on the *Tour Details* tab at the top of the window. This will show the screen with a further six tabs displayed. Each tab allows entry of the different items that go together to make up a tour. Enter the details as required in the window.



To show the status of any work click on the

*Arrow* to the right of the box to show a drop down list. Select a status by clicking on it with the mouse button. The *Status* tells the system what type of tour it is. For example a tour can be 'Firm', 'Cancelled' or 'Provisional'. You can also add and delete your own statuses via the *Manage* section.

The *Additional Booking Information* box allows you to enter confidential information regarding the booking which will not be printed out anywhere a client may see it,

Similarly, the *Additional Work Ticket Information* box will allow the entry of text that will be printed on the *Work Ticket* for the booking.

### Entering A New Tour



Click on the *New* button on the tool bar at the top of the screen. A unique reference will be entered at the top of the window based on the reference style that you created in the *Manage* section. Enter the name of the tour in the *Name box* (the default is Tour).

### Saving Changes

To save the changes you make to a new or existing tour click on the *Save* button on the toolbar at the top of the screen.

### Deleting Tours

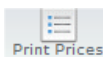
To delete a tour click on the *Delete* button on the toolbar at the top of the screen. If you have assigned any customers to the tour you will not be permitted to delete it.

### Print Tour Details



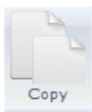
To print the details of the tour for internal use click on the *Print Details* button on the toolbar at the top of the screen.

### Print Tour Pricing



To print a list of the prices that you have entered click on the *Print Prices* button on the toolbar.

### Copy Tour



To make a copy of the tour click on the *Copy* button on the toolbar at the top of the screen. You will then be asked to select options from the *Copy Options* window. Select the date that you want the copy to begin and each part date will be offset by the number of days between the date that you entered and the date of the original.

## Tour Itinerary



Click on the *Itinerary* button on the toolbar at the top of the window to add itinerary details to a tour. Enter a number for the day e.g. day 1, day 2 etc., you can use the same number more than once. Enter a description and then a depart and arrive time if required. If you do use times tick the *Use* box to the right to print them out.

## Edit Itinerary

Highlight the row containing the itinerary that you want to edit and then right mouse click on the same row. Select *Edit* from the pop up menu. At the *Edit Itinerary* window make the changes that you require and click on the *OK* button.

## Delete Itinerary

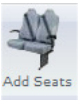
Highlight the row containing the itinerary that you want to delete and then right mouse click on the same row. Select *Delete* from the pop up menu. At the *Confirmation* window select *Yes* to make the deletion and *No* to return without making any changes.

## Tour Seating Plan

The *Tour Seating* panel in the middle of the screen shows the status of the seats on the tour and the seat plan. To select a different plan if more than one has been assigned to the tour click on the arrow to the right of the *Plan* box. This will display a drop down box where you can select a different plan for the tour by clicking on the relevant number or highlight the number in the box and type in a number corresponding to another plan. In the tab area at the top is the legend for the status of each seat. The seats in the graphical section will display the colour relevant to its status. Therefore, if a client has been allocated to a seat and has paid in full that seat's colour will show as red if you have made the change.

## Add A Seating Plan To A Tour

To add a seat plan to the tour click on the *Add Seats* button on the toolbar at the top of the screen. This will open the *Select Plan* window. This window shows a list of the seating plans available,



**N.B.** Selecting a seating plan from this window does **not** allocate a vehicle to the tour. You still have to allocate a vehicle via the *Allocations* screen or *Schedules* screen.

As many seat plans as required can be added to a tour. To add a plan select a vehicle from the list and click on the *OK* button and the plan will be added. Click on the *Close Window* button if you do not want to take any action.

Once you have entered the details and seat plan for the tour you will now be able to assign customers to seats in the *Clients* section.

## Remove A Plan



Click on the *Remove* button on the toolbar at the top of the screen. At the next window enter the plan that you want to remove and click on *OK*. Note that if you have customers assigned to seats on the plan that you want to remove then they will be removed as well.



### Renumber A Plan



If you have removed a plan then you will probably have a number list that is no longer sequential. To remedy this click on the *Renumber* button on the toolbar at the top of the screen. At the next window enter the plan that you want to renumber and in the next box enter the new number and click on *OK*.

### Adding Agents



To add any agents to the tour click on the *Agent* button on the toolbar. At the *Add Agent* window select the agent by double clicking on the row containing the agent and the agent will be added to the list. The agent list that has been created will then be available for selection against each client.

### Removing Agents

Highlight the row containing the agent that you want to remove and then right mouse click on the same row. Select *Remove* from the pop up menu and the agent will be removed.

### Tour Parts

Each tour can be made up of several parts which will give a great deal of flexibility to the planning and detailing of the tour.

When you start a new tour the first part will always be created and will be of the type *Single* (shown in the *Type* column in the grid). This can be changed to *Return* by clicking on the checkbox *Return*. As well as these types you can also have the types *Ferry Out* and *Ferry Ret*. See below for setting these particular types.

### Adding Parts To A Tour



To add parts to the tour click on the *Part* button on the toolbar at the top of the screen. This will add another part below the last part in the grid. It will automatically default to a *Single* journey.

### Adding Ferry Details To A Tour



To add a ferry part to the tour click on the *Ferry* button on the toolbar at the top of the screen. The *Add Ferry Details* window will show. In the *Outward* panel enter the carrier name and ports with the times of departure and arrival. If the return is simply a reversal of the outward journey then click on the *Copy Return* button and add the corresponding dates and times. Click on the *Add* button when you are ready to add the details to the system. The outward and return legs will appear as two lines in both the *Parts* grid and the *Allocations* screen.

The ferry details will also look different below the grid -




Start	<input type="checkbox"/> Single	<input type="checkbox"/> Return	<input type="checkbox"/> N/A	<input checked="" type="checkbox"/> Stay At Site	<input type="radio"/> No	<input type="radio"/> Yes	No. Of Veh.	2	+	-	
Start	17/07/2015 Fri	26	10:00	Carrier And Ferry Departure Port	Brittany Ferries					Ferry Arrival Port	Caen
				Portsmouth							
	17/07/2015 Fri	26	11:00								


## Edit Ferry Details

To edit ferry details highlight the row containing the ferry entry. Right mouse click on the ferry entry and select *Edit Ferry Details* from the pop up menu. *The Edit Ferry Details* will show. Once you've made your changes click on *OK* or if you don't wish to change anything or cancel any changes you have made click on *Close Window*.

## Entering and Editing Addresses And Details To A Part

To enter addresses and other details highlight the part by clicking on it in the grid. The *Start Position* and *Destination* boxes below the grid will show any details already entered. To enter an address start on the top line. As you type an address into the box the system will attempt to match it with one of the existing addresses that you have already stored. If the address is not one of your stored addresses just carry on typing and the system will ignore any further input once it cannot find a match.

Another way to enter an address from any existing addresses that you have saved is by clicking on the *House* button to  the right of the top line. This will show a list of all the stored addresses that you have saved. Scroll down the list or use the *Find* box at the top of the window to locate the address that you want and then double click on it to enter it in the window. If you have purchased the *Postcode* data then you can click on  the *Letter* button and find and enter an address by using just the postcode. Any address that you have entered can be saved or stored in your list of addresses by clicking on  the *Floppy Disc* button to the right of the boxes.

*Start Position* and *Destination* notes can be entered by clicking on the *Notes* button to  the right of the address boxes and will show on the work tickets.

*Start* and *Arrive* are the dates and times that the vehicle is expected to depart and arrive for the booking. The *Return Depart* and *Arrive* boxes are only shown in the window when the *Return* check box has been clicked on. All dates and times must be entered where required for the system to be able to accurately portray the activities in the various screens. You can manually enter dates and times into the box or select an date or time by clicking on the *Calendar* button or the *Clock* button.

Select the type of part by clicking on the *Single* or *Return* checkbox. If you select *Single* the system will remove the return dates from the screen and the system will treat it as a single 'outward' booking. Selecting *Return* allows return dates to be specified. If the vehicle is to stay on the site between the outward and return activity click on the *Yes* check box. This will tell the system that the vehicle is not available between the outward and return activities. This is only available for *Return* parts.

Each part can have a different number of vehicles allotted to it. To increase/decrease the number click on the + and - signs to the right of the *No. Of Veh.* box.

## Deleting Part Of A Tour

To delete a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Delete* from the menu and click on *Yes* at the confirmation window.

### Copy A Part

To copy a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Copy* from the menu.

### Move A Part To A Different Position

Occasionally you may have need to move a part up or down the list. Click on the row to highlight it and then right mouse click to show a pop up menu and select *Move Up* or *Move Down* from the menu. This will place the part one position above or below depending on your selection.

### Adding Pick Ups/Set Downs To A Part

Each part can have pick ups and set downs assigned to it which gives a large amount of flexibility to a booking. Multiple parts with associated pick ups/set downs means all types of work can be accomplished.



All client pick ups and set downs that are entered can also be set against a client.

Click on the *Client Pick Up* or *Client Set Down* option boxes in the *Status* panel to make the entry available for clients. This means that if you are doing multiple pick up and set downs of clients you can see on the screen where the connections are being made and also create a list which can be handed to your driver.

To add pick ups and set downs to the part click on the *Pick Up* button on the toolbar at the top of the screen or right mouse click on the bottom *Pick Up And Set Downs* grid to display a pop up menu and select *Add* to show the *Add Pick Up/Set Down* window.

Click on the direction of travel and then on the status. You have a choice of which status depending on whether it is a pick up or a set down. The first row are standard pick up/set downs for the booking. The middle row contains the pick ups/set downs for clients whilst the last row contains the pick up/set down status for excursions.

Enter the details in the *Details* box. Click on the *Envelope* button to use a postcode (if you have purchased the postcode data) to enter an address or the *Signpost* button to use details that you have entered before. Put in the times of arrival and departure and the number of passengers if required. Finally enter any instructions for the personnel to follow. Click on the *Information* button to use previously entered instructions.

Click on *OK* when you have finished. The window will not close but will clear the boxes ready for another entry. To close the window click on *Close Window*.

### Edit A Pick Up/Set Down

To edit a pick up/set down click on the row to highlight it and then right mouse click to show a pop up menu and select *Edit* from the menu.

### Copy A Pick Up/Set Down

To copy a pick up/set down click on the row to highlight it and then right mouse click to show a pop up menu and select *Copy* from the menu.

### Insert A Pick Up/Set Down

To insert a pick up/set down click on the row to highlight the *Pick Up/Set Down* that you

want to insert the new pick up above and then right mouse click to show a pop up menu and select *Insert* from the menu.

### Move A Pick Up/Set Down

To move a pick up/set down to a new position click on the row to highlight it and then right mouse click to show a pop up menu. Select the required command from the menu.

## Hotel Rooms

The *Hotel Rooms* tab allows you to add rooms and prices to the tour. Each time a room is added the description is available for use on any other tours that are created which means that you don't have to re-enter descriptions twice.

### Entering A New Room



Click on the *Add* button on the tool bar at the top of the screen. Click on the arrow to the right of the *Name* box to select a hotel from the drop down list. If it is a new hotel and not in the list then type the name and other details into the boxes provided.

Enter the number of rooms that are available to you in the *Qty.* box and then the occupancy and whether it is a smoking or non smoking in the following sections.

Click on the arrow to the right of the *Description* box to show a window with a list of previously entered descriptions. When the window opens simply locate and double click on the description to enter it into the *Add Room* window. If you have a long list of descriptions use the *Find* box to reduce the length of the list.

If it is a new room description type the text into the *Description* box and select a room icon by clicking on the farthest arrow on the same line as the *Description* box to show a drop down list of bedroom configurations. Double click on the required icon to place it in the window.

If the room includes other features such as 'Full Board', 'B & B' then these can be entered into the *Includes* box. Click on the arrow to the right of the *Includes* box to show a window with a list of previously entered descriptions. When the window opens simply locate and double click on the description to enter it into the *Includes* box. If you have a long list of descriptions use the *Find* box to reduce the length of the list. If it is a new includes description type your text into the *Includes* box .

Enter the arrival date into the *Arrive* box. Once you have made the entry you can then either enter the number of nights into the *Nights* box and the system will work out the departure date or enter the departure date into the *Depart* box and the system will work out the number of nights.

The cost of the room can be worked out in various ways -

- 1) Enter the total cost of the room for all nights but excluding any VAT involved into the *Cost* box.
- 2) Enter the VAT rate and then the total amount including any VAT into the *Total* box.
- 3) Enter the VAT rate and then the price per person per night into the *PPPN* box.
- 4) Enter the VAT rate and then the price per room per night into the *PPRN* box.

In all these cases the system will then fill in the other boxes with the correct amounts. When you are satisfied with the entry click on the *Add* button to add it to your list of rooms for this tour. The window will stay open for you to add another room if you need to. To close the window click on the *Close Window* button. To clear the room details and start again click on the *Clear* button.

#### Edit A Room

To edit a room highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

#### Copy A Room

To make a copy of a room highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Copy* and an exact copy of the room will be entered into the list where you can also then edit it if required.

#### Delete A Room

To delete a room highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Delete* from the menu and select *Yes* from the confirmation window.

### Additions

The *Additions* tab allows you to add options, supplements, insurance and excursions to the price list. These are usually ‘extras’ over and above the standard price of a tour.

#### Add An Addition

To add an addition click on the icon at the top of the window (*Opt./Supp, Insurance* or *Excursions*). Enter the details as required and then click on *Add* to save it to the database. The window will be blanked allowing you to add more if you need to. Click on *Close Window* to return to the main screen.



#### Edit An Addition

To edit an addition highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

#### Delete An Addition

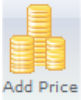
To delete an addition highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Delete* from the menu and select *Yes* from the confirmation window.

### Price List

Any prices that you have entered using the *Hotel Rooms* and *Additions* tabs will also be shown in this list on the *Price List* tab which could be best described as a master price list. You can also create standard and travel prices if required.

Price List

### Add A Price



Three further types of price can be added using the *Add* button at the top of the window. *Standard* and *Travel* prices allow you to create, for the former an overall price for the tour and for the latter a price to indicate the travel part of the tour if needed. An example would be a range of standard or travel prices for a tour such as - Adult Single, Child Single, Concession etc. However, if you just have the one price you won't be able to break down the pricing in the same way as the other methods. Once you have entered a description and a price click on the *Add* button to add the price to the list. When you have finished adding prices click on the *Close Window* button to close the window.

### Edit A Price

To edit a price highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

### Delete A Price

To delete a price highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Delete* from the menu and select *Yes* from the confirmation window.

## Clients



Click on the *Client* tab to show and enter clients for each tour. The screen is split into three main areas. The first area is the top left panel. This panel contains a grid with a list of all the clients which have purchased the tour and can be sorted by some of the columns by clicking on the *Header* of a column. Below this grid is another panel with 5 sections. These sections show the details for each client based on the selection in the grid above. The third area to the right and top shows the seating for the tour and the overall number of seats that are still free for the tour and the current status of the seats.

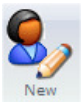
### Assign An Existing Client To A Tour

First select a seat either by clicking on the seat in the *Tour Seats* panel to the right or by clicking on the seat in the *Clients* grid. To add a client click on the buttons marked *Client* on the toolbar at the top of the screen.



To find a client you can either enter the client ID in the left hand box or to find by surname or company name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be entered in the *Client* grid at the row you selected. If you want to search all the entries for any occurrence of the search string place an asterisk before the character in the box e.g. - \*gr. Wildcards are also supported by the entry box (see *appendix ii*).

### Assign A New Client To A Tour



First select a seat either by clicking on the seat in the *Tour Seats* panel to the right or by clicking on the seat in the *Clients* grid. Click on the *New* button on the toolbar at the top of the screen. This will display the *Add A New Client* window. In the *Client Ref.* box at the top of the window enter a unique reference for the new

client. If that reference already exists then the system will automatically append a number to the end of the reference to create a unique identifier. Alternatively, if you click on the button to the right of the box after entering the details of the client the system will automatically create a unique reference based on the client's name. Enter the rest of the client's details in the boxes provided to complete the client's record. Apart from the *Forename* and *Surname* of a client none of the remaining fields are mandatory so if there are unknown parts to the client's details then these can be omitted. If all the details are correct click on the *OK* icon or text to add the details to the system.

#### Assigning Clients Without Using The Client's Window

The system remembers the details of the client that has been selected or added using either the *Clients* or the *Add A New Client* window and can, therefore, be assigned to other seats without having to use the *Find Clients* window again. To assign the same client to another seat right mouse click on the grid or seat panel on a vacant seat to show a pop up menu and then select *Assign Client*. For groups of people where payment is by a single person from the group this method must be used as the system will then group all the seats under the same reference. Each seat will have the same name as the person who booked the group but where necessary seat names can be allocated within a group. If another client is selected or added then the original details are replaced and the new client's details are retained by the system. Therefore, if you need to add a client's details to another seat at a later stage you must use *Copy Client* from the pop up menu.

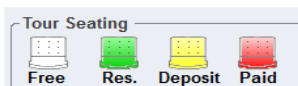
#### Copy Client

There are occasion when you will need to add a another seat to a client who has already been assigned. An example of this would be when a client has booked themselves onto the tour and at a later stage needs to add someone else to the booking. This can be easily achieved with a right mouse click on the client in the grid or seat panel to show a pop up menu and then select *Copy Client*. You can then assign that clients details in the same way as if you had selected them from the *Find Clients* windows.

#### Add Details To A Client

Each seat can have further details applied to it apart from the initial client's details. To add details highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Add Details* from the menu to display the *Add Details* window. Add the seat name e.g. the customer is A. Smith but the seat is in the name of F. Smith. Select the customer designation and gender by clicking on the relevant item and add any notes you want to. Click on the *OK* button.

#### Seat Status



A seat can be in one of 4 states; white – free (available), green – reserved , yellow – deposit paid and red – paid in full.

These states are set by the user using one of the following three methods -

- 1) By clicking on the seat with the right mouse button to show a pop-up menu then select *Make Seat* which shows a sub menu from where you can select the status

- 2) You can click on one of the seats on the plan to highlight it and then one of the icons below *Tour Seating*
- 3) Click and highlight the customer in the grid and then right mouse click to show a pop up menu. Select *Make Seat* to show a sub menu and then select the status from one of the following - *Free, Reserved, Deposit Paid or Paid In Full*
- 4) Please note that this will change the status of each and every seat in a group.

Selecting *Free* will only make the chosen seat that was clicked on free. You will also lose any information, such as prices, from that seat.

### Printing A Confirmation

The system can automatically create confirmation letters based around pre-existing templates which use the customers' information you have entered. Included within the system are some templates that have already been created for you to use. If these are not suitable for your needs or do not fit all the booking types that you have then the system also allows you to create your own templates via the *Manage* section.

To start a new confirmation letter for a client use a right mouse click on a highlighted client in the grid or a client in the seat panel to show a pop up menu and then select *Confirmation Letter*. This will open the *Select Confirmation Template* window. This window shows all the templates that are available for you to use. You can view templates in the right hand panel by clicking on the template on the left that you want to view. If you have stored templates in another location click on the *Open Template* button at the bottom of the window to navigate to the folder where they are stored. When you have made your choice click on the *OK* icon or text at the bottom of the window or click on *Close Window* if you don't want to go any further.

Clicking on the *OK* icon or text displays the *Preview* window where you can see what the letter will actually look like with all the booking details entered. At this stage you can also edit or enter text into the confirmation letter by clicking on the *Edit* button on the toolbar at the top of the screen. This text may be something unique to the client such as - "Include 2 Child Seats". If you are satisfied with the content then you can print it out by clicking on the *Print* button at the top of the window. You can also save the letter by clicking on the *RTF* button which is also at the top of the window. This will save it as a file which can be opened at a later time and printed if required. The letter is saved as a RTF (rich text format) file which means that it can also be read and edited by any program that can import RTF files. Typical programs would be word processing programs such as Microsoft Word or Open Office

You can also save it as a PDF file which can be emailed to the client or email it directly to the client using the entered email address of the client. Please note that directly sent emails are in text form only.

### Move Client To A New Seat

To move a client to a different seat click on the seat or grid with the right mouse button to show a pop-up menu. Select *Move Client To New Seat* to display the *Move Seat* window. The top panel will show the current seat details. Enter the new seat number and if there is



more than one plan you can also move the client to a different seating plan by entering the number of the plan you want to move the client to.

### Move A Group To New Seats

A group of clients can have their seats changed in one operation. Click on the seat of one of the group or click on one of the group in the grid below the seats with the right mouse button to show a pop-up menu. Select *Move Group To New Seats* from the menu to show the *Move Group* window.

The details of the customer are shown in the four left columns. To change a seat click on the arrow at the end of the row to show a drop down list of available seats. Select the seat by clicking on it and those details will be entered in the last column. Make as many changes as you want then when you are ready click on the *OK* button at the bottom. If you decide that you do not want to make any changes then click on the *Close Window* icon or text.

Only seats that are free are shown in the drop down list. However, it is possible for the same seat to be allocated to more than one person from the drop down list. If this happens then only the first one will be allocated to the new seat and any others will be unchanged.

### Add Prices To A Client

Highlight the client by clicking in the row of the grid and then select from one if the pricing options shown on the toolbar.

### Add Tour Pricing To A Client



To add a price from the *Tour Pricing* list click on the *Tour Prices* button on the toolbar at the top of the screen. Only the prices that you have set up for this tour will be shown.

The Tour Pricing window is divided into 6 tabs -

Tour Pricing					
All	Standard/Travel	Rooms	Options/Supplements	Insurance	Excursions
Qty.	Type	Description			Price
1	Excursion	Guided Tour Amiens From 23/08/2015 09:00:00 To 23/08/2015 17:00:00			£60.00
1	Excursion	Tour of Sword, Gold and Juno Beaches and War Graves Inc. Lunch From 19/04/2014 09:00:00			£0.00
1	Insurance	Standard Adult Travel Insurance From 17/04/2014 To 20/04/2014			£54.00
1	Opt./Supp.	Sea View From 17/04/2014 To 20/04/2014			£72.00
2	Room	Hotel De Normandy : Double Breakfast and Dinner From 17/04/2014 To 20/04/2014			£504.00
1	Room	Hotel De Normandy : Single Breakfast and Dinner From 17/04/2014 To 20/04/2014			£403.20

*All* - The entire price list is shown in this tab.

*Standard/Travel* - Only prices that are standard or travel are displayed.

*Rooms* - All the information for a room including the availability is shown.

*Options/Supplements* - Only option or supplement prices are shown.

*Insurance* - Only insurance prices are shown.

*Excursions* - Only excursion prices are shown.

In the first column on the left is the *Qty*, column. The number in there is based on the number in the group. You can change the quantity by highlighting the number in the column and typing over it or you can select a quantity by clicking on the arrow button to the right of the column and selecting a quantity from the drop down list.

This window has a multi selection option so that you can add several prices at once or just a single price at a time if required -


**Control Key** - Hold the control key down and select the individual prices with the mouse. Every line that is selected will turn to yellow

**Shift Key** - Click on a row and then hold the shift key down. Select another row by clicking on it and all the rows between will turn to yellow to indicate they have been selected.

Once you are happy with a selection click on the *Add* button to add them to the price list of the customer. When you have finished adding prices click on the *Close Window* button to close the window.

To view the prices for a client click on the *Transaction* tab in the bottom panel.

### Adding A Price From The Price List




Click on the *Prices* button to add a price to the booking. If you have created tabs (see *Manage*) then select the tab you require to show the list of prices that you have set up under that heading.

The simplest way to add a price is to double click on the row containing the price. This will then enter that price into the grid on the main window.

If you need more than the default quantity of 1 then you can change the amount by clicking in the *Qty*. column and typing the number required or by clicking on the arrow to the right you can select a quantity from the list that is shown.

### Adding A Free Form Price



Free form pricing allows you to enter prices that are not in any price list that you have set up. It gives a flexibility for those one off pricing situations that are not catered for with set price lists.

Enter the *Item* for the price either by typing into the box or by clicking on the arrow to the right and selecting from the list. Beneath the *Item* enter a description into the *Description* box.

Enter the *Qty*. and then the unit price into the *Price* box. This will show a sub total in the box below.

Enter any discount as a percentage in the box below.

Finally enter any VAT and when you are satisfied that the price is correct click on *OK* to add the price to the main grid.

The window will clear and be ready for you to enter another price. Click on the X in the top right hand corner to close the window.

### Edit A Price

Highlight the row of the client by clicking on it and then click on the *Transaction* tab below if it isn't already showing. Highlight the price you want to edit and then click on it with the right mouse button to show a pop up menu. Select *Edit* from the menu and at the *Edit Price* window make your changes.

### Delete A Price

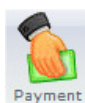
Highlight the row of the client by clicking on it and then click on the *Transaction* tab below if it isn't already showing. Highlight the price you want to delete and then click on it with the right mouse button to show a pop up menu. Select *Delete* from the menu.

### Row Height

Sometimes there will be too much information in the *Description* columns to show it all in the grid. If you need to see more of it then right mouse click on the grid and select *Increase Row Height* from the pop up menu to allow more space for the description. To return to the normal row height select *Standard Row Height*.

Item	Description	Qty.	Price	Disc. %	Net	VAT	Rate
Room	Hotel De Normandy : Double Breakfast and Dinner Arr: 17/04/2014 Dep: 20/04/2014	2	£450.00				
Room	Hotel De Normandy : Single Breakfast and Dinner Arr: 17/04/2014 Dep: 20/04/2014	1	£360.00				
Room	Hotel De Normandy : Single Breakfast and Dinner Arr: 17/04/2014 Dep: 20/04/2014	1	£360.00				

### Add A Payment



To add a payment click on the *Payment* button on the toolbar at the top of the screen to show the *Add Payment* window. Enter the date in the *Date* box. Enter the amount in the *Amount* box. To enter a method of payment click on the arrow to the right of the *Method* box and select a method from the list that is displayed.

Similarly, select the type of payment, the payment description and the *Invoice* number (if applicable) from the drop down lists. Enter any notes about the payment into the *Notes* box.

When you are satisfied with the entries click on the *OK* button to set the payment against the booking and the payment will be shown in the lower grid.

Payments can be set against invoices created for this booking by a right mouse click on the payment to display a pop up menu. Select *Add Payment To Invoice* from the menu and select the correct invoice from the window. Any payments that are entered using this screen can be assigned at a later stage to an invoice via the *Payments* screen.

All payments entered will show in the transactions grid (*Transactions* tab)

### Edit A Payment

To edit a payment highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

### Add An Invoice

An invoice can be created for a customer without having to use *Invoice* section (however, invoices can only be edited and printed using *Invoice*). Select and highlight the customer in the client grid or by clicking on a seat on the seating plan to the right. Once selected click on the *Transactions* tab to show the price and payments for the highlighted client.

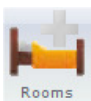


Click on the *Invoice* button on the toolbar at the top of the screen. At the confirmation window that appears select *Yes* to continue. At the *Add New Invoice* window that opens enter the details. At the *Payment Due* box select the type of invoice for when the amount is due. This could be Paid In Full, Pre Paid, No. of days, etc. Click on the arrow to the right of the box to show a list. Click on the required entry and the selection will be entered into the *Payment Due* box. The number of days will also be entered

into the *Due Days* box when applicable and the due date will be calculated and entered into the *Due Date* box. When you have finished entering click on the *OK* button and the system will add all prices and payments to that invoice. The invoice number is shown in the right hand column of the transactions grid.

### Entering A Room Without A Price

If you have a standard or all encompassing price for a tour e.g. 'Scotland Highlands Adult 2011 £560' you may still want to add rooms to the customer but without the price to keep your tour well organised.



To do this click on the *Room* icon at the top of the screen to show the *Add Room To Client* window. In the last column on the right is the *Qty.* column. You can change the quantity by highlighting the number in the column and typing over it or you can select a quantity by clicking on the arrow button to the right of the column and selecting a quantity from the drop down list.

This window has a multi selection option so that you can add several prices at once or just a single price at a time if required -

**Control Key** - Hold the control key down and select the individual prices with the mouse. Every line that is selected will turn to yellow

**Shift Key** - Click on a row and then hold the shift key down. Select another row by clicking on it and all the rows between will turn to yellow to indicate they have been selected.

Once you are happy with a selection click on the *Add* button to add them to the price list of the customer. When you have finished adding prices click on the *Close Window* button to close the window.

To view the rooms for a client click on the *Rooms* tab in the bottom panel.

### Adding Agents

To add any agents to the client select the client in the grid by clicking on the row. Once the client is highlighted click on the *Details* tab at the bottom to show that customer's information. At the *Agent* box click on the arrow to the right and select the agent from the list.

### Removing Agents

To remove an agent from the client select the client in the grid by clicking on the row. Once the client is highlighted click on the *Details* tab at the bottom to show that customer's information. At the *Agent* box click on the arrow to the right and select *None* from the list.

### Adding Feeder Pickups/Set Downs To Clients

Any pick ups/set downs that have been entered as *Client Pick Up* or *Client Set Down* (see Adding Pick Ups/Set Downs To A Part) are available to be set against a client. Click on the *Pick Up/Set Downs* tab and then highlight a row in the group of customers shown. Right mouse click and from the pop up menu select *Add Pick Up/Set Down*. This will show the *Add Feeder Details* window. Choose the pick up/set down that you require and

then at the bottom select either the *Single* or *Group* button. If you select the single button then the information will only be placed against the name selected in the pick up/set down grid. Selecting the group button will place the information against all the names in the grid.

#### Remove Pick Ups/Set Downs

Highlight the row of the client by clicking on it in the *Pick Up/Set Downs* tab and then click on it with the right mouse button to show a pop up menu. Select *Remove* from the menu.

#### Pick Ups/Set Downs Row Height

Sometimes there will be too much information in the columns to show it all in the grid. If you need to see more of it then right mouse click on the grid and select *Increase Row Height* from the pop up menu to allow more space for the description. To return to the normal row height select *Standard Row Height*.

#### Client List



Click on the *Client* button to produce a client report which will include the coach and seat numbers and any feeder pick ups/set downs.

#### Pick Up/Set Down List



If you are picking up clients from different parts of the country and or dropping then off at different set down points then this list will detail the locations with the names of the clients to be picked up. Click on the *Pick Up* button and select from the menu the outward or return list that you would like to print.

#### Room List



The system can produce a room list separated by hotel name which can be forwarded to the hotels themselves to confirm requirements. Click on the *Hotel Rooms* button and select from the menu *Hotel Rooms* to produce the room report.

#### Room Client List



The system can produce an individual client list for rooms separated by hotel name which can be forwarded to the hotels. Click on the *Clients Rooms* button to produce the room report.

#### Ferry Passenger List

Click on the *Ferry* button to produce a passenger registration list for outbound and return ferry crossings. If you have allocated a vehicle and a driver to the ferry parts in the *Allocations* screen then they will show on the report otherwise these details will be left blank for you to fill in. It should be stressed that any vehicle allocations that you make should match the vehicle seating of the seating plans used.



## Labels

To create a set of labels which can be placed on luggage tags click on the *Labels* button on the toolbar at the top of the screen. This will show the *Label Selection* window. All label types are standard J8160 Avery labels. Tick the boxes for the contents that you want to show on the label. There is a limit to the number of items that you can have based on the label size. When you are satisfied click on the *OK* button or text or if you want to return to the main screen without printing the labels click on the *Close Window* button.



## Adding A Log To A Tour Client

Highlight the row of the client by clicking on it and then click on the *Log* tab below if it isn't already showing. Click on the *Log* button to add any customer contacts by telephone, e-mail, letter etc. This allows an accurate record of all interactions with a client to be kept.

## Client's Ticket

Highlight the row of the client by clicking on it and then click on it with the right mouse button to show a pop up menu. Select *Print Ticket* from the menu.

## Quotes



The *Quotes* screen allows you to create a quote which is kept apart from your main bookings. The method of creating quotes and how to use the different functions is exactly the same as the main *Bookings* screen.

## Entering A New Quote



Click on the *New* button on the tool bar at the top of the screen. A unique reference will be entered at the top of the window based on the reference style that you created in the *Manage* section.

## Entering A New Quote From A Client's Enquiry

If you have an enquiry form on your web site and it is configured as per *appendix v* then you can copy and paste the email and with a single click enter all the details as a new booking.

Click on the *Email* button on the tool bar at the top of the screen. This will show the *Add Email* window after a confirmation popup window. Right mouse click in the centre panel and select *Paste* from the popup menu. This will paste your client's email into the centre panel. Click on *Create New Quote* and the details will be entered as a new quote. If you don't want to create a new quote click on *Close Window* to return to the main screen.



**N.B.** the enquiry must be in the format shown in *appendix v*. This may mean that you would have to adjust your web form to respond in the format required by the system.

### Saving Changes

To save changes you make to a new or existing quote click on the *Save* button on the toolbar at the top of the screen.

### Deleting Quotes

To delete a quote click on the *Delete* button on the toolbar at the top of the screen.

### Print Quote

To print the details of the quote for internal use click on the *Print* button on the toolbar at the top of the screen.

### Move Quote

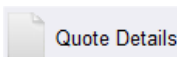
When a client confirms a quote then you will need to transfer the quote to the booking operation so that vehicle and personnel allocations can be made and invoices created .

To move a quote click on the *Move* button on the toolbar at the top of the window. A confirmation window will open to check that you want to proceed. If you select *Yes* then the system will assign a new booking reference to the quote and it will be available to view via the *Find Me* window.



### Quote Details Tab

Enter the details as required in the window. The *Additional Quote Information* box allows you to enter confidential information regarding the quote which will not be printed out anywhere a client may see it.



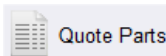
### Quote Parts

Each quote can be made up of several parts although the most common jobs will require only one part. The advantage of this method is that complicated work such as a wedding which involves, for example, collecting guests from the railway station and taking them to the church, then from the church to the reception and finally from the reception back to the railway station can be very easily created in three parts. So instead of having to create complicated pick ups and set downs or making three separate quotes everything is simply contained in the one quote. Each part can then be allocated to the same or different drivers and vehicles.

Similarly, a contract quote will have the same details for a part but on several different days, all of which can be effortlessly formulated.

For a diagrammatical view of the relationship between quote, parts and other items please see *appendix i*).

When you start a new quote the first part will always be created.



Adding Parts To A Quote



If you need to add more parts to the quote click on the *New Part* button on the toolbar at the top of the screen. This will add another part below the last part in the grid.

Entering and Editing Addresses And Details To A Part

Select a part to enter the start position (*Position*) and destination by clicking on the row in the grid to highlight it. The *Start Position* and *Destination* boxes below the grid will show any details already entered.

To enter an address start on the top line. As you type an address into the box the system will attempt to match it with one of the existing addresses that you have already stored. If the address is not one of your stored addresses just carry on typing and the system will ignore any further input once it cannot find a match.

Another way to enter an address from any existing addresses that you have saved is by clicking on the *House* (*fig. 13*) button to the right of the top line. This will show a list of all the stored addresses that you have saved. Scroll down the list or use the *Find* box at the top of the window to locate the address that you want and then double click on it to enter it in the window. If you have purchased the *Postcode* data then you can click on the letter and find and enter an address by using just the postcode. To enter a client's address click on the *People* button to the right of the address boxes.

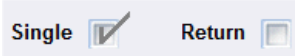
Any address that you have entered can be saved or stored in your list of addresses by clicking on the *Floppy Disc* button to the right of the boxes.

*Start Position* and *Destination* notes can be entered click on the *Notes* button to the right of the address boxes and will show on the work tickets.

To add flight information to the part click on the *Aeroplane* button to the right of the address boxes which will show on the work tickets

*Start* and *Arrive* are the dates and times that the vehicle is expected to depart and arrive for the quote. The *Return Depart* and *Arrive* boxes are only shown in the window when the *Return* check box has been clicked on. All dates and times must be entered where required for the system to be able to accurately portray the activities in the various screens. You can manually enter dates and times into the box or select an date or time by clicking on the *Calendar* button or the *Clock* button.

Select the type of part by clicking on the *Single* or *Return* checkbox. If you select *Single* the system will remove the return dates from the screen and the system will treat it as a single 'outward' quote with the *Stay At Site* option set to *No*. Selecting *Return* allows return

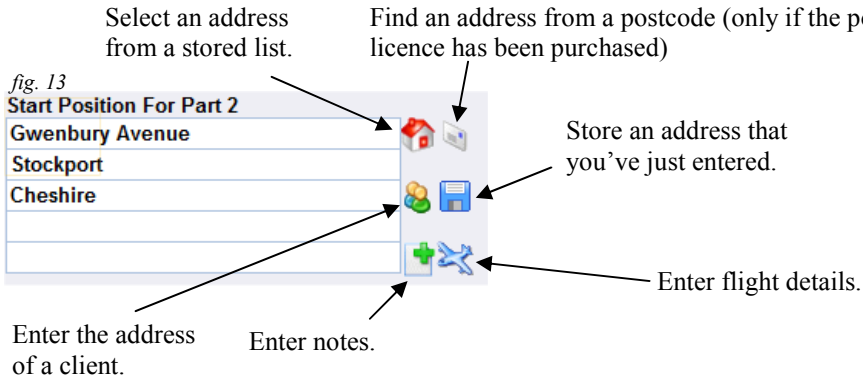


dates to be specified.

If the vehicle is to stay on the site between the outward and return activity click on the *Yes* check box. This will tell the system that the vehicle is not available between the outward and return activities.

Each part can have a different number of vehicles allotted to it. To increase/decrease the number click on the + and - signs to the right of the *No. Of Veh.* box.





### Adding Email Details To An Existing Quote

Click on the *Parts* tab and highlight the part you want to add an address or date/time to. The part will be highlighted in yellow and the text will be italicised. The part can be blank or already have entries. Any entries will be overwritten. Right mouse click on the part and from the popup menu select *Add Email Details*. The *Add Client's Email Details To Quote* window will be displayed. Paste any details you have into the respective boxes. It is not necessary to have an entry in box.

If any of the addresses are in the form of a single line with only spaces between each part of the address such as -

*A Street B Town, C County Postcode*

then you must manually enter a comma between each part of the address -

*A Street, B Town, C County, Postcode*

If you don't use a comma to separate the parts then everything will be saved to a single line.

If the address is in the form-

*A Street*

*B Town*

*C County*

*Postcode*

Then the system will not ordinarily have a problem with it.

See *appendix vi* for date formats that can be used.

### Adding Prices With Addresses

Prices using *Start Positions* and/or *Destinations* can be added using the *Quotes Parts* tab. To add pricing highlight a row by clicking on it with the left mouse button and then click on it again with the right mouse button to show a pop up menu. From the menu select *Add Description To Pricing*. This will show a further menu with options -

*Destination*

*Start Position And Destination*

Selecting one of these options from the menu will open the *Add Price* window. The *De-*

*scription* box will be filled depending on the option chosen. Further to that at the side of the *Description* box is a button showing a blue plus sign. Clicking on this button will show the *Add Description* window where you can select further options to show in the *Description* box. If you want the description in a certain order then you must select the option you want and click on *OK* and then open the *Add Description* window again.

### Deleting Part Of A Quote

To delete a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Delete* from the menu and click on *Yes* at the confirmation window.

### Copy A Part

To copy a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Copy* from the menu.

### Copy And Reverse A Part

If required a part can be split into two different parts comprising separate details for an outward part of the journey and a return part. However, it should be noted at this stage that this action cannot be reversed. Single, start and finish journeys cannot be split. The advantage with splitting a part is that the part will appear as two separate and individual entities. This can be useful when a quote has two different dates for the outward and return parts of the quote e.g. airports where the return pick up will be different date.

To split a part click on the row to highlight it and then right mouse click to show a pop up menu. Select *Copy Reverse* from the menu.

### Go To A Part By Date

If you have a quote with a large number of parts then you may need to find a part by date. Click on the row to highlight it and then right mouse click to show a pop up menu and select *Go To Date* from the menu. The *Select Date* window will show. Navigate to the required date and double click on it to be taken to the correct part.

### Move A Part To A Different Position

Occasionally you may have need to move a part up or down the list. Click on the row to highlight it and then right mouse click to show a pop up menu and select *Move Up* or *Move Down* from the menu. This will place the part one position above or below depending on your selection.

### Create A Start And/Or Finish For A Part

If you want to include the journeys from your yard and back again this can be easily achieved by highlighting a part and clicking on it with the right hand mouse to show a popup menu. Select *Create Yard To Start* if you want to show a journey from your yard to the position address. The system will automatically take the start time of the part and use it for the arrival time of the *Yard To Start* part. It will automatically deduct 15 minutes from the start time of the part to allow for positioning. Select *Create Destination To Yard to*

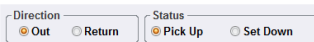
show the journey from the last position to the yard. If the part is a return then the *Position* address will be used. If it only a single part then the *Destination* address will be used. Select *Create Yard Start And Destination* to create both types in a single action.

### Adding Pick Ups/Set Downs To A Part



Each part can have pick ups and set downs assigned to it which gives a large amount of flexibility to a quote. Multiple parts with associated pick ups/set downs means all types of work can be accomplished. To add pick ups and set downs to the part selected click on the *Pick Up* button on the toolbar at the top of the screen or right mouse click on Pick Ups and Set Downs grid at the bottom of the screen to display a pop up menu and select *Add* to show the *Add Pick Up/Set Down* window.

Click on the direction of travel and then on the status. Enter the details in the *Details* box.



Click on the *Envelope* button to use a postcode (if you have purchased the postcode licence) to enter an address or the *Pickup* button to use details that you have entered before.

Put in the times of arrival and departure and the number of passengers if required. Finally enter any instructions for the personnel to follow. Click on the *Information* button to use previously entered instructions.

Click on *OK* when you have finished. The window will not close but will clear the boxes ready for another entry. To close the window click on *Close Window*.

### Edit A Pick Up/Set Down

To edit a pick up/set down click on the row to highlight it and then right mouse click to show a pop up menu and select *Edit* from the menu.

### Copy A Pick Up/Set Down

To edit a pick up/set down click on the row to highlight it and then right mouse click to show a pop up menu and select *Copy* from the menu.

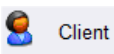
### Insert A Pick Up/Set Down

To insert a pick up/set down click on the row to highlight the *Pick Up/Set Down* that you want to insert the new pick up above and then right mouse click to show a pop up menu and select *Insert* from the menu.

### Move A Pick Up/Set Down

To move a pick up/set down to a new position click on the row to highlight it and then right mouse click to show a pop up menu. Select the required command from the menu.

## Client



The *Client* tab shows the details of the client that has made the quote along with a log of contact with the client. Prices cannot be added to the quote without a client having been entered.

## Adding An Existing Client



To add an existing client click on the button marked *Client* on the toolbar at the top of the screen. This displays the *Find Clients* window.

To find a client you can either enter the client ID in the left hand box or to find by name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be entered in the *Client* panel. If you want to search all the entries for any occurrence of the search string place an asterisk before the character in the box e.g. - \*gr. Wildcards are also supported by the entry box (see *appendix ii*).

## Adding A New Client



If the client is new and not on your existing client list then you can add the new client's details at this stage without having to return to another screen. To add a new client click on the *New Client* button on the toolbar. This will display the *Add A New Client* window. In the *Client Ref.* box at the top of the window enter a unique reference for the new client. If that reference already exists then the system will automatically append a number to the end of the reference to create a unique identifier. Alternatively, if you click on the button to the right of the box after entering the details of the client the system will automatically create a unique reference based on the client's name. Enter the rest of the client's details in the boxes provided to complete the client's record. Apart from the *Forename* and *Surname* of a client none of the remaining fields are mandatory so if there are unknown parts to the client's details then these can be omitted. If all the details are correct click on the *OK* icon to add the details to the system or click on the *Close Window* icon to return without adding anything.

## Editing A Client



Any client's details that are showing in the client section can be edited by clicking on the edit button on the toolbar at the top of the screen.. This will show the *Edit Client Details* screen. You can change and add details in the same way as you would add a new client. Details changed via this window are permanent.

## Copy A Client's Address

To copy a client's address for use in another program such as Avery Labels, click on the *Copy Address* button on the toolbar at the top of the window where the address details will be saved to the clipboard and can be pasted into another program later.

## Printing A Confirmation

The system can automatically create confirmation letters based around pre-existing templates which use the information you have entered into the quote screen. Included within the system are some templates that have already been created for you to use. If these are not suitable for your needs or do not fit all the quote types that you have then the system also allows you to create your own templates via the *Manage* section.

To start a new confirmation letter for a client click on the *Confirmation* button on the toolbar at the top of the screen. This opens the *Select Confirmation Template* window. This window shows all the templates that are available for you to use. You can view

templates in the right hand panel by clicking on the template that you want to view. If you have stored templates in another location click on the *Open Template* button at the bottom of the window to navigate to the folder where they are stored. When you have made your choice click on the *OK* icon at the bottom of the window or click on *Close Window* if you don't want to go any further.

Clicking on the *OK* icon or text displays the *Print Preview* window where you can see what the letter will actually look like with all the quote details entered. Within this tab you can select different pages and alter and adjust sizes.

To print and other actions click on the *Print* tab. With this tab you can also edit or enter text into the confirmation letter by clicking on the *Edit* button on the toolbar at the top of the screen. This text may be something unique to the client such as - "Include 2 Child Seats". If you are satisfied with the content then you can print it out by clicking on the *Print* button at the top of the window. You can also email the letter to a client by clicking on the *Email* button at the top (you must have your email settings entered into the system) and you can save the letter by clicking on the *RTF* button which is also at the top of the window. This will save it as a file which can be opened at a later time and printed if required. The letter is saved as an RTF (rich text format) file which means that it can also be read and edited by any program that can import RTF files. Typical programs would be word processing programs such as Microsoft Word. Click on PDF to save it as a PDF format document which can be attached to an email.

#### Adding A Log To The Client



Click on the *Log* button to add any customer contacts by telephone, e-mail, letter etc. This allows an accurate record of all interactions with a client to be kept.

#### Pricing



The pricing tab permits a very flexible way of adding prices to a quote. Not only can you select prices from a pre-determined price list created by yourselves but also freeform pricing is easy to add allowing non-standard prices to be entered.

#### Adding A Price From The Price List



Click on the *Prices* button to add a price to the quote. If you have created tabs (see *Manage*) then select the tab you require to show the list of prices that you have set up under that heading.

The simplest way to add a price is to double click on the row containing the price. This will then enter that price into the grid on the main window.

If you need more than the default quantity of 1 then you can change the amount by clicking in the *Qty.* column and typing the number required or by clicking on the arrow to the right you can select a quantity from the list that is shown.

There are further options available to the way that the prices are described in the main window. To view the alternatives highlight a row by clicking on it using the left mouse button and then right mouse click to show a pop up menu. The actions of the menu are described as follows.

## *Add Price With Tab Description*

This will place the tab description before the price description in the main window. For example - if the tab has a heading of “16 Seater” and the price description is “Full day sightseeing” then the description in the main window will be “16 Seater Full day sightseeing”.

## *Add Price With Destination*

The destination of the *Part* that was last selected under the *Quotes Parts* tab will be entered at the end of the description. As an example - if the destination of the part was “Grantham Hotel” and the price description is “One way” then the description in the main window will be “One way to Grantham Hotel”. Please note—you **must** select the part in the *Quotes Parts* tab to use this feature.

## *Add Price With Start And Destination*

The start position and the destination of the *Part* that was last selected under the *Quote Parts* tab will be entered at the end of the description. As an example - if the start position was “East Midland Airport” and the destination of the part was “Grantham Hotel” and the price description is “One way” then the description in the main window will be “One way East Midland Airport to Grantham Hotel”. Please note—you **must** select the part in the *Quotes Parts* tab to use this feature.

## *Add Price With Tab Description And Destination*

This will place the tab description before the price description and the destination of the *Part* that was last selected under the *Quote Parts* tab will be entered at the end of the description. As an example - if the tab has a heading of “16 Seater” and the destination of the part was “Grantham Hotel” and the price description is “One way” then the description in the main window will be “16 Seater One way to Grantham Hotel”. Please note—you **must** select the part in the *Quote Parts* tab to use this feature.

The window does not close after each selection is made. Once you have finished entering the required prices you must close the window by clicking on the *X* in the top right hand corner.

## Adding A Free Form Price



Free form pricing allows you to enter prices that are not in any price list that you have set up. It gives a flexibility for those one off pricing situations that are not catered for with set price lists. Click on the *Freeform Prices* button to add a price to the quote.

If you need to put the price against a particular part then select the part from the drop down list at the top by clicking on the arrow to the right.

Enter the *Item* for the price either by typing into the box or by clicking on the arrow to the right and selecting from the list. Beneath the *Item* enter a description into the *Description* box.

Enter the *Qty.* and then the unit price into the *Price* box. This will show a sub total in the box below.

Enter any discount as a percentage in the box below.

Finally enter any *VAT* and when you are satisfied that the price is correct click on *OK* to add the price to the main grid.

The window will clear and be ready for you to enter another price. Click on the *X* in the top right hand corner to close the window.

### Edit A Price

To edit a price highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Edit* from the menu and make the changes as required.

### Increase/Decrease Quantities In The Grid

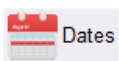
You can make changes to the quantities of a price without having to use the *Edit* window with either of the following methods. First highlight the row containing the price by clicking on it.

Right mouse click on the row to display a pop up menu. Select *Qty. +1* or *Qty. -1* and the quantities will be incremented or decremented by 1.

Click on the *Qty.* column and then click on the arrow to the right. Select the quantity from the list and the price will be updated to reflect the change.

Double click on the quantity to highlight it and then type in the quantity needed.

### Dates



The *Dates* tab is in the form of a calendar and shows the dates that have been assigned to the parts that make up the quote. Only the start dates are shown, therefore any quotes that are greater than one day will only show their beginning dates. You should use the *Schedule* screen for an accurate picture of date spreads. You can also set up other quote types that involve repeating elements.

### Make Copies To Individual Dates

Simply click on a date with the mouse and that date will turn to a pale orange to show that it has been selected. Click on as many as you need to make a specific set of dates.

To make a regular set of dates such as a swim run that only takes place once a week then click on the start date with the mouse which will turn that date to a pale orange. Right mouse click on the date and choose *Weekly Repeat* from the menu. At the next window enter the from and to dates and click on the *OK* button.



To make the copies click on the *Copy* button on the toolbar at the top of the screen. The *Make Copies* window will open and show a list of all the parts that have been created for that quote. Select a part and then click on *Copy*. For each entry you have made a copy of the original will be created for it.

### Making Copies In Blocks

Simply click on a date with the mouse and the shift key depress and that date will turn to a pale orange to show that it has been selected as the start of the block. As well as this the mouse cursor will turn to an arrow facing two lines. This denotes that you are in block mode. Keep the shift key depressed and click on the date where you would like the block



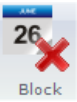
to end. The system will then fill in between the dates selected. To make the copies click on the *Copy* button on the toolbar at the top of the screen. The *Make Copies* window will open and show a list of all the parts that have been created for that

booking. Select a part and then click on *Copy* or *Copy No Weekends*. If you select the latter then all the copies will be made on all dates except weekends, the former will add copies to every date selected. For each entry you have made then a copy of the original will be created for it.

### Remove Selected Dates

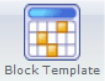
To remove a single selected date right mouse click on the date and choose *Remove* from the pop up menu. To remove a range of selected dates right mouse click on a date and choose *Remove Between Dates* from the menu.

### Excluding Dates



To exclude a range of dates on the calendar such as school holidays, half terms, click on the *Block* button on the toolbar at the top of the screen. Enter the *From* and *To* dates and give the exclusion a name so that you can find it easily again if you want to re-use the same dates on another quote. Click on the *OK* button at the bottom of the window and those dates will appear on the calendar.

### Using Existing Exclusion Dates



To use an existing range of exclusion dates click on the *Block Templates* button on the toolbar at the top of the screen. Highlight an entry from the list and then click on the *Add* button at the bottom of the window and those dates will appear on the calendar. Note that any exclusion dates that you have set up for the current quote will not show in the list.

### Deleting An Exclusion Date

To remove an excluded date right mouse click on the date and choose *Delete* from the pop up menu.



# Allocations

The *Allocations* section allows the viewing and allocation of work to vehicles and personnel and the printing out of *Work Tickets* and associated reports.

## *Allocations*



The *Allocations* screen shows the work allocated between two chosen dates and which vehicles and employees have been allocated to do that work. It also produces several reports including the facility to print *Work Tickets*. At the bottom of the screen are the personnel and vehicles. By double clicking on a name or vehicle that person or vehicle will be allocated to the work that is highlighted. Personnel commitments including any absences etc. will be shown in the grid to the right.

### Changing Dates

To show a different range of bookings in the top grid you can click to the right of the *From* or *To* box to show a calendar. Select the date from the calendar that you want and the grid will be updated to show the bookings for the spread of dates chosen. Alternatively you can click into the box and use the arrows that appear to move up and down the whole or part of the date highlighted. You can also type directly into the date box to change a date.

From 09/01/2015 26 To 09/01/2016 26

### Show Different Booking Types

When the screen first opens all types of work are shown. To restrict the screen to one type click on the *Show* button on the toolbar at the top of the screen and choose from the menu that appears. Select the type you want to view and the screen will be updated to only show that type. Select *All* if you want to see everything. If you want to find any bookings that haven't had personnel or vehicles yet allocated then select *Unallocated Personnel* or *Unallocated Vehicles*. Select DTE from the menu to view all the work that can be sent to Don't Travel Empty.



### Sorting The Display

The display is sorted by the Out Departure dates and times when you first open the window. To use another sort order click on the *Sort* button on the toolbar at the top of the screen. This will show a menu. Select the order that you want to see on the screen and the display will be updated to reflect your choice.



### Display By Status

To restrict or view bookings by their status click on the arrow to the right of the *Status* box and make a selection from the drop down list. Selecting *All*, which is the default when the window opens, shows everything that is current excepting any booking with a *Cancelled* status

Status All

## Show A Booking By Reference

Reference

You can show booking that only match an entry you make in the booking reference box. Enter the search text details into the *Booking Ref.* box and the screen will be updated with all the bookings that match the text entered. Wild cards can also be used to open up the search (see *appendix ii*).

## View Details Of A Booking

The grid on the screen cannot show all the details of a booking. To see further details highlight the row and right mouse click to show a pop up menu. Select *View Details* and a pop up window will show more.

## Allocating Personnel

Highlight the row containing the booking that you want to allocate personnel to by clicking on it. The row will be highlighted in yellow.

### Allocate With The Personnel Grid

Double click on the row of the personnel that you want to allocate and the personnel will appear in the *Personnel* column in the row containing the highlighted booking.

To allocate to all the parts showing or to add as additional personnel to a booking (such as a guide) highlight the row of the personnel and then right mouse click to show a pop up menu. Make your selection and the allocation grid will be updated.

To allocate to selected parts click on each part individually whilst holding the CTRL key down. Click with the right mouse button to show the pop up menu and select *Add To Selected Parts*. All the selected parts will be updated with the chosen personnel.

### Find Free Personnel

The system will also show which personnel are free for any particular booking. Right mouse click on the highlighted booking and at the pop up menu select *Find Free Personnel*. The *Available Personnel* window will open and from there you can make your selection by double clicking on the row. The personnel that you select will be placed into the highlighted booking.

## Allocating Vehicles

Highlight the row containing the booking that you want to allocate vehicles to by clicking on it. The row will be highlighted in yellow.

### Allocate With The Vehicle Grid

Double click on the row of the vehicle that you want to allocate and the vehicle will appear in the *Vehicle* column in the row containing the highlighted booking.

To allocate to all the parts showing or to add as an additional vehicle to a booking highlight the row of the vehicle and then right mouse click to show a pop up menu. Make your selection and the allocation grid will be updated.

To allocate to selected parts click on each part individually whilst holding the CTRL key

down. Click with the right mouse button to show the pop up menu and select *Add To Selected Parts*. All the selected parts will be updated with the chosen personnel.

### Find A Free Vehicle

The system will also show which vehicles are free for any particular booking. Right mouse click on the highlighted booking and at the pop up menu select *Find Free Vehicles*. The *Available Vehicle* window will open and from there you can make your selection by double clicking on the row. The vehicle that you select will be placed into the highlighted booking.

### Editing A Booking

Highlight the row containing the booking that you want to edit by clicking on it and then right mouse click to show a pop up menu. Select *Edit* and the booking will show in the *Bookings* or *Tour* window.

### Remove A Vehicle Or Personnel

Highlight the row containing the booking that you want to remove the personnel or vehicles from by clicking on it and then right mouse click to show a pop up menu. Select *Remove Personnel* or *Remove Vehicle* to remove only from the highlighted booking. Select *Remove Personnel From All Parts* or *Remove Vehicle From All Parts* to remove from all of the parts of the booking.

### Split Work

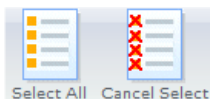
Sometimes there is a requirement to split work that was initially set as one activity. This can occur when the return part of the work has to be completed by a different vehicle or personnel to the outward part. To achieve this highlight the row containing the booking that you want to split by clicking on it and then right mouse click to show a pop up menu. Select *Split Work* from the menu. This will split the work into an *Out* and *Ret.* Parts. They can now be allocated in the same way as before. To see the start time for the second part of the booking you will need to show the *Ret. Start* columns (see page 63 *Showing And Hiding Columns In The Allocation Grid* ). All split work shows as *Ret. Split* in the *Type* column in the *Allocations* grid.

**N.B.** This operation can only be carried out if the work was originally set to return; singles and tours are not eligible for this action. Nor can you split work that has the *Stay At Site* set to *Yes*.

### Printing Work Tickets

A work ticket is a sheet of instructions for each job given to personnel. By formalising this process you can avoid the problems that can occur with verbal instructions and arrangements written on scraps of paper.

If a vehicle and personnel have been allocated to a job then that work can be printed as a work ticket by highlighting the row or rows containing the allocated bookings . To cancel all selections made click on the *Cancel* button and to select all valid work at once click on the *Select All* button. To





print the work tickets for employees click on the *Tickets* button on the toolbar.

All allocations that have been allocated to a single person and are the same booking will appear on the same work ticket. This means that if you have a booking comprising of 3 parts which have all been allocated to the same member of personnel then all three will print on the one sheet (or if it's a booking with many parts it may print on more than one) instead of having each part printing on a separate sheet which will help to keep costs down.

To make and highlight a block multi selection click on the first booking and, with the shift key held down, click on your last selection.

To make individual selections hold the CTRL key down and click on each individual row that you want to include.

The ticket or tickets will first be shown in a preview window. From the preview window you can print them, save them as PDFs or email them to drivers.

Printing A Drivers' Allocation Report

The driver's allocation report is a simplified version of the work tickets. All work is printed separately for each driver in a continuous format in time order. No pick up or set down details are included. Start and destination notes are shown however. To start the list click on the *Drivers* button on the toolbar. This will display the *Select Driver* window. If you select *All* then every driver will be printed plus any unallocated work but if you select a driver then only that driver's work for the dates shown will be on the report. Please note that extended tours will not print on this report.



Exporting Work To Outlook

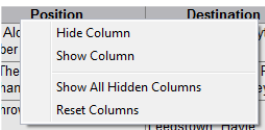
Each part of a job can be sent to MS Outlook to create an entry in the Calendar. To send a part highlight each part or parts and right mouse click on it or them to show a pop up menu. From that menu select *Export To Outlook*. Once you've clicked on the menu item all selected parts will be sent to outlook and will appear within the calendar.

Showing And Hiding Columns In The Allocation Grid

When you first open the window the grid defaults to a standard layout of columns. However, you can change which columns are shown and which are hidden according to your own requirements excepting the first *Reference* column which can't be hidden. All changes that you make are saved by the system for the next time that you use the window.

To Show A Column That Is Hidden

First you must unhide all columns. To do this click on a column header with the left mouse



button. This will show a pop up menu. From the menu select *Show All Hidden Columns*. All columns that had previously been hidden will now show in the grid with a backcolour of red for the column heading. Click on the column header you want to show with the left mouse button to show the pop up menu again and select *Show Column* from

Art	Out
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with the left mouse button to show the pop up menu again and select *Show Column* from

the menu. The column heading will change to a light blue. Reset the grid with your choices showing by selecting *Reset Columns* from the pop up menu.

### Hide A Column

A column can be hidden at any time by clicking on the column header you want to hide with the left mouse button to show a pop up menu and selecting *Hide Column* from the menu

### Change A Column Width In The Allocation Grid

When you first open the window the grid defaults to a standard width for each of the columns. However, you can change the column width by placing the mouse over the dividing line to the right of each column header. The cursor will change to a double opposing headed arrow with a vertical line. At this point click with the left mouse button and hold the button down. Move the mouse and a line will indicate the new position of the divider. Let go of the button when you have changed the column to the width you wanted. The system will then store the new width and remember it each time you open the window. Please note that you cannot change the width of the first column and that the width of the *Position* and *Destination* columns will be wider than a width you have set if the grid allows it.

### DTE

The system allows you to send empty legs to *Don't Travel Empty*. There are three buttons that will show on the toolbar at the top of the screen. However, these will only show if you do not have the *Auto Send* facility set to *On* (see page 5 DTE Tab).

### Send An Empty Leg To DTE



Select and highlight a booking in the *Allocations* grid. On the toolbar at the top of the screen click on the *Send* button. If it is successful the *DTE* column will show *Yes*.

Please note not all bookings qualify to be sent to *Don't Travel Empty*. If you want to view those bookings which can be sent then click on the *Show* button and select *DTE* from the pop up menu (see page 60 *Show Different Booking Types*)

### Cancel An Empty Leg Previously Sent



There may be occasions when you need to cancel a leg that has already been sent. In which case click on the *Cancel* button at the top of the screen and *DTE* will be notified of the cancellation

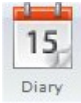
### Job Hash



Each successful empty leg that has been sent returns a hash code. This can be used to identify any problems there may be with the sending of particular legs. Click on the *Job Hash* button at the top of the screen to show the hash code for that particular booking.

## Diary

The diary screen shows all the bookings, allocations and other items over different periods.

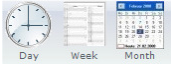


It can be shown in a day, week or month view for vehicles, personnel and all bookings by selecting the required tab. As well as viewing the schedules you can also move and reallocate bookings to different vehicles and personnel in this screen as well as making new allocations.

### Changing Dates

To show a different start date for the window you can click to the right of the from box to show a calendar. Select the date from the calendar that you want and the grid will be updated to show the bookings for the spread of dates chosen. Alternatively you can click into the box and use the arrows that appear to move up and down the whole or part of the date highlighted. You can also type directly into the date box to change a date.

### Changing The View



To change between the day, week and month view click on the respective button on the toolbar at the top of the screen.

### Vehicles, Personnel And Bookings

Click on the respective tab to view the displays. The *Vehicle* tab will show all the bookings that have been allocated to a vehicle and also any inspections, services etc. that have been booked via the maintenance system. Similarly, the *Personnel* tab will show all bookings allocated to them and anything else such as absences. The *Bookings* tab shows only bookings.

### Showing The Different Statuses

The on screen booking parts can be restricted to just one type or all by selecting from the drop down list activated by clicking on the *Status* box.

### Showing Different Booking Types

When the screen initially opens all the types of bookings are shown. To restrict the screen to one type click on the *Show* button on the toolbar at the top of the screen to reveal a drop down box.



Select the type you want to view and the screen will be updated to only show that type. Select *All* if you want to see everything.

### Viewing Booking Details

To see the details of any work click on the item with the right mouse button to show the information in a small window.

### Allocating Work To Vehicles Or Personnel



Click on the *Vehicles* or *Personnel* tab to select the required schedule. Simply click on a vehicle's registration or the

person's name to the left of the screen to show a pop up menu. Select *Allocate* from the menu and a window will be displayed showing all the unallocated work for that day. To allocate double click on the row in the grid.

### *Adding And Editing Absences To Personnel*

As well as work, other events can be allocated to each individual, such as holidays, breaks etc., from this screen. Simply click on a person's name to the left of the screen to show a pop-up menu. Select *Add* from the menu and the *Add Absence* window will be displayed. Select the type from the drop down list and then enter the *Start* and *Finish* dates along with the times. Enter a description and any notes if required. Then select whether it is continuous or a repeated absence. The difference is in the way that the absence is recorded. For example a holiday would be continuous-it starts on one date and finishes on a later date. Whereas a regular appointment which happens between two times but every day for a set period would be a repeat absence. Click on *OK*. Click on *Close Window* if you don't want to make an addition.

To edit an absence right mouse click on the absence to show a pop up menu. Select *Edit* from the menu and the *Edit Absence* window will show for the absence. Make the changes to the details of the absence then click on the *OK* button to add the changes or *Close Window* to return to the screen without making any changes.

### *Editing A Booking*

Right mouse click on the booking that you want to edit to show a pop up menu. Select *Edit* and the booking will show in the *Booking* window.

### *Show A Booking In The Allocations Window*

Right mouse click on the booking that you want to view to show a pop up menu. Select *Show In Allocations* and the booking will show in the *Allocations* window.

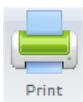
### *Remove An Allocated Vehicle Or Person*

Right mouse click on the booking to show a pop up menu. Select *Remove Vehicle* or *Remove Personnel* and at the next window click on *Yes* to confirm the action.

### *Reallocating A Vehicle Or Person*

To reallocate an entry to a different vehicle or person hold down the shift key and click on the entry that you want to move. The border of the entry will turn to blue and will follow the cursor as you move it around the screen. When you have placed the entry where you want it to be on the screen release the mouse button and the entry will move to its new position. You should note, however, that the times of the entry cannot be changed.

### *Print A Report*



To print a report of the data that is on the screen click on the *Print* button on the toolbar at the top of the screen.

# Invoicing

The *Invoicing* section is an invoice and payments management system that allows you to make invoices and keep a check on amounts that are owed.

## *Search*

Existing invoices and credit notes can be located using the *Search Invoices* screen. Various permutations exist which allow you to very quickly locate unpaid and overdue invoices. Once an invoice has been found using one of the methods below simply double click on the booking or right mouse click on it and select *Open* from the pop up menu to open it in the *Create Invoice* or *Create Credit/Refund* window.



### *Finding Invoices*

To show all invoice between two dates change either the *From* date or the *To* date or both by clicking on the arrow to the right of the box and selecting the date from the calendar or by clicking on the date or section of the date and typing or using the arrows to change the date.

From 09/10/2015 26 To 09/04/2016 26

Invoices can be shown by their invoice reference by entering criteria into the *Reference* box. As you enter text into the box all the records will be shown whose invoice reference matches the text entered. Wild cards can also be used to open up the search (see *appendix ii*).

Reference

You can also restrict invoices to just a single client by clicking on the button marked *Client* on the toolbar at the top of the screen to show the *Find Clients* window. To find a client you can either enter the client *ID* in the left hand box or to find by surname or company name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be used by the *Search Invoice* window. If you want to search all the entries for any occurrence of the search string place an asterisk before the character in the box e.g. - \*gr. Wildcards are also supported by the entry box (see *appendix ii*).



To view overdue invoices or reset the window click on the *Show* button on the toolbar at the top of the screen. Make your selection from the menu list and the window will be updated.



### *Exporting A Sage File*

You can export invoices to a file that can be imported into Sage. Click on the *Sage* button at the top of the screen. The system checks for invoices that can be exported and then checks that all the customers exist in the Sage database. If there are any customers missing then a pop up window will show and ask if you would like to create a file with the missing client's details that can be imported into Sage. If you select *No* then the process is halted. Selecting *Yes* will create the file which must be imported or the clients' details entered manually before the system will process any further invoices. If the file creation is successful then a further pop up window will show asking you if you want to mark the invoices as exported. If you select *No* the next time you run





the Sage file creation those invoices will be included in the file. Selecting *Yes* will change the *Exported* column to Yes for all the relevant invoices

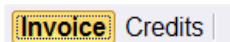
## *Create Invoices*



This window is used to create and edit invoices and to record payments to an invoice from a client.

### Invoice

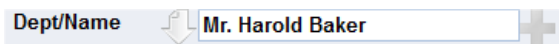
This tab will show all the details of an invoice including any payments that have been set to print with the invoice. Each time that you enter a customer on an invoice the system will look at the last invoice created for that client and, if it exists, bring back the last comment, invoice terms and print template used and place them on the screen.



### Create A New Invoice



Click on the *New* button on the toolbar at the top of the screen. This will clear the screen, create a new invoice number and ask you to select a client. To find a client you can either enter the client ID in the left hand box or to find by surname or company name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be entered into the *Invoice* tab. If you want to search all the entries for any occurrence of the search string place an asterisk before the character in the box e.g. - \*gr. Wildcards are also supported by the entry box (see *appendix ii*). If the department or name is different to the original then



you can type it into the *Dept/Name* box or select from a list of entries that you have entered before by clicking

on the arrow to the left of the box. If you enter a new name into the box you can add it to the list by clicking on the *Plus* button to the right hand side. This ability to use different names means that you can have one address with different departments. For example, a school will have the one address but you may deal with several departments or people within that organisation.

Enter the following -

**Invoice Date** - To change the invoice date click on the right of the *Invoice Date* box to show a calendar or click on the date or section of the date and type or use the arrows to change the date.

**Invoice Terms** - This box allows you to set the latest that an invoice is due by. Click on the arrow to the left of the box to show a list. Click on the required entry and the selection will be entered into the *Payment Due* box. The number of days will also be entered into the *Due Days* box. You can change the number of days when shown by clicking and highlighting it and typing in a new number. The due date will then be calculated and entered into the *Due Date* box

**Invoice Company** - If you have more than one company in the system then you should select the correct company for the invoice by clicking on the arrow to the right of the

*Invoice Comp.* box. Select the company from the drop down list.

**Invoice Comment** - Type in this box any comment that you want to appear on the invoice or alternatively select a comment from the list provided by clicking on the arrow to the right of the box. You can add more comments by clicking on the *Lists* button in the *Manage* section and selecting *Comments* from the sub menu.

**Purchase Order** - If a purchase order number has been supplied by the client then you can enter it in this box.

**Print Template** - Select the template you want to use from the list shown by clicking on the arrow to the left of the *Print Template* box.

## Edit An Invoice

Use the *Find Invoices* window to open an invoice in to the *Create Invoice* window ready for editing.

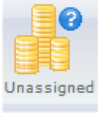
## Delete An Invoice

To delete an invoice click on the *Delete* button on the toolbar at the top of the screen.

## Add Unassigned Prices To An Invoice

Every time a booking is created and prices allocated to the booking those prices become available to add to an invoice. It means that you don't have to re-enter all the details a second time, all you have to do is select those prices from a list that you want to add to an invoice. The lists are client specific and once entered on to an invoice are no longer available for selection.

To add unassigned prices to an invoice click on the *Unassigned* button on the toolbar at the top of the screen to show the *Unassigned Sales Items* window. You can add an item by simply double clicking on it or you can select the items you want to be entered on the invoice by a single click which will highlight each item (the highlighted line shows yellow). Right mouse click anywhere on the grid and select *Add Selected* from the pop up menu. To add all the unassigned items in one go right mouse click on the grid and from the pop up menu select *Add All*.



## Add Prices To An Invoice

As well as unassigned prices you can also enter prices from any price list that you have created. Click on the *Prices* button to add a price to the invoice. If you have created tabs (see *Manage*) then select the tab you require to show the list of prices that you have set up under that heading.



The simplest way to add a price is to double click on the row containing the price. This will then enter that price into the grid on the main window.

If you need more than the default quantity of 1 then you can change the amount by clicking in the *Qty.* column and typing the number required or by clicking on the arrow to the right you can select a quantity from the list that is shown.

To add a price using the tab description highlight a row by clicking on it using the left mouse button and then right mouse click to show a pop up menu. Select *Add Price With*

*Tab Description* and this will place the tab description before the price description in the main window. For example - if the tab has a heading of “16 Seater” and the price description is “Full day sightseeing” then the description in the main window will be “16 Seater Full day sightseeing”.

#### Add Free Form Prices To An Invoice

Free form pricing allows you to enter prices that are not in any price list that you have set up. It gives a flexibility for those one off pricing situations that are not catered for with set price lists. Click on the *Freeform* button to add a free form price to the invoice.



Enter the *Item* for the price either by typing into the box or by clicking on the arrow to the right and selecting from the list. Beneath the *Item* enter a description into the *Description* box.

Enter the *Qty.* and then the unit price into the *Price* box. This will show a sub total in the box below.

Enter any discount as a percentage in the box below.

Finally enter any VAT and when you are satisfied that the price is correct click on OK to add the price to the main grid.

To enter just a description or text leave the *Qty.* box blank or enter a zero into the box. Only the item/description will show in the main screen.

#### Increase/Decrease Quantities In The Grid

You can make changes to the quantities of a price without having to use the *Edit* window. First highlight the row containing the price by clicking on it. Right mouse click on the row to display a pop up menu. Select *Qty. +1* or *Qty. -1* and the quantities will be incremented or decremented by 1.

#### Merge Similar Pricing



This button allows you to merge similar items, such as a school run, into a single line price.

#### Edit A Price Item

Highlight the item that you want to edit and right mouse click to show a pop up menu. From that menu select *Edit Item* and make your changes as required. You also use this window to enter any discounts.

#### Apply A Discount To All The Prices In The Grid

Any discount that you have entered can be applied to the whole of the list of prices. First highlight the row containing the discount that you want to apply by clicking on it. Right mouse click on the row to display a pop up menu. Select *Apply This Discount To All Price Items* and the pricing will be updated.

#### Remove Price From This Invoice

To remove a price highlight the row by clicking on it and then right mouse click to display

a pop up menu. Select *Remove Price Item From This Invoice* from the menu. The price item is not deleted but just removed from the invoice and is available again for using on another invoice.

## Booking Reference

Any prices that haven't been set against a booking reference can be assigned by clicking in the *Booking Ref.* column of the row containing the price, This will show an arrow to the right of the column. Click on the arrow and select from the pop up menu the number of bookings that you want to display. Make your selection from the list that shows and the price will be assigned to that booking.

## Sorting The Order Of Items

Click on the column header to sort the grid by that column's entries. You can only sort by the following columns – Booking Ref., Date, Item, Description and Price

## Print An Invoice

First make sure that you have the correct print template chosen. Click on the *Print* button on the toolbar at the top of the window to preview the invoice. If you are satisfied with the pre-view then click on one of the following buttons -

Print - This will send the invoice to the printer for a hard copy of the invoice.

PDF - This will save it as a PDF file which can then be sent to clients as an attachment for an e-mail.

RTF - Use this button if you would like to add or adjust the invoice manually in a word processor.

## Credits

**Invoice** **Credits** This tab will show all the details of any payments that have been made against the invoice.

## Add A Payment

Click on the *Pay* button on the toolbar at the top of the screen. This will show the add payment window where you will add the details of the payment -



Date - To enter the date of the payment click on the right of the date box to show a calendar or click on the date or section of the date and type or use the arrows to change the date.

Amount - Enter the amount of the payment in the *Amount* box.

Type - This shows what type of payment has been made such as a payment or adjustment. To enter click on the arrow to the right of the *Type* box and pick the type from the list shown or type straight into the box.

Desc. - This is a description of the payment such as a balance or part payment of the invoice. To enter a type click on the arrow to the right of the *Type* box and pick the description from the list shown or type straight into the box.

**Method** - Click on the arrow to the right of the *Method* box and pick a method of payment from the list shown or type straight into the box

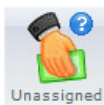
**Booking** - Click on the arrow to the right of the *Booking* box and pick the booking that the payment will be for.

**Notes** - Enter any notes for the payment in this box.

**Show** - Click on the *Yes* check box if you want to show the payment on the invoice or *No* if you don't. *Credit Notes* and *Refunds* cannot be shown on an invoice, only as part of the credits against an invoice,

When you have completed the entries click on the *OK* icon or text at the bottom of the window and the payment will be entered. Click on *Cancel* to clear any entries you have made. Click on *Close Window* when you want to return to the main screen without a payment being entered.

### Unassigned Payments



Payments which have been set against a booking but not an invoice and similarly any credits or refund items that have been entered but not set against an invoice can be assigned to the invoice from the *Unassigned Payments* window. Click on the *Unassigned* button to show any unassigned payments or credits. In the *Unassigned Payments* window double click on any payments you want to set against the invoice. Close the window by clicking on the *X* in the right hand top corner of the window and all selections will be shown in the grid on the main window.

### Edit A Payment

To edit a payment highlight the row containing the payment and then right mouse click to show a pop up menu. Select *Edit* from the menu to display the *Edit Payment* window. Make your changes as required and then click on the *OK* button at the bottom of the window. *Credit Notes* and *Refunds* cannot be edited in this way. You should find them in the *Find Invoices* window and then edit them in the *Create Credit/Refund* window. If the invoice has been printed you cannot edit the amount nor the date.

### Remove A Payment

To remove a payment highlight the row containing the payment and then right mouse click to show a pop up menu. Select *Remove From This Invoice* from the menu and the payment will be removed from the invoice but will still be available to assign to another one. If the invoice has been printed you can only remove a payment that has a zero total.

### Remove A Booking Reference

To remove a booking reference highlight the row containing the payment and then right mouse click to show a pop up menu. Select *Remove Booking Ref.* from the menu and the reference will be removed from the payment.

### Remove A Credit Note/Refund

To remove a credit note/refund highlight the row containing the payment and then right mouse click to show a pop up menu. Select *Remove Credit/Refund* from the menu and the

credit note/refund will be removed from the invoice but will still be available to assign to another one.

### Lock An Invoice Or Credit Note



To lock an invoice or credit note click on the *Lock* button on the toolbar at the top of the screen. This will have the effect of making the invoice or credit unavailable for any modification. This is also a one way process. You cannot undo the lock.

### **Create Credit Notes/Refunds**



This window is used to create and edit Credit Notes and Refunds to clients.

### Create A New Credit Note/Refund

Click on the *New* button on the toolbar at the top of the screen. This will clear the screen, create a new credit number reference (these are similar to the invoice references except that they have the letters CR at the front) and ask you to select a client. To find a client you can either enter the client ID in the left hand box or to find by surname or company name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their details will be entered into the *Invoice* tab. If you want to search all the entries for any occurrence of the search string place an asterisk before the character in the box e.g. - \*gr. Wildcards are also supported by the entry box (see *appendix ii*). If the department or name is different to the original then you can type it into the *Dept/Name* box or select from a list of entries that you have entered before by clicking on the arrow to the left of the box. If you enter a new name into the box you can add it to the list by clicking on the *Plus* button to the right hand side. This ability to use different names means that you can have one address with different departments. For example, a school will have the one address but you may deal with several departments or people within that organisation.

Enter the following -

**Credit Date** - To change the credit date click on the right of the *Credit Date* box to show a calendar or click on the date or section of the date and type or use the arrows to change the date.

**Credit Type** - Select the *Credit* or *Refund* checkbox.

**Company** - If you have more than one company in the system then you should select the correct company for the invoice by clicking on the arrow to the right of the *Company* box. Select the company from the drop down list.

**Comment** - Type in this box any comment that you want to appear on the credit note or alternatively select a comment from the list provided by clicking on the arrow to the right of the box.

**Print Template** - Select the template you want to use from the list shown by clicking on the arrow to the left of the *Print Template* box.

### Edit A Credit Note/Refund

Use the *Search* window to open a credit note or refund in to the *Create Credit Note/Refund* window ready for editing.

### Delete A Credit Note/Refund



To delete an invoice click on the *Delete* button on the toolbar at the top of the screen.

### Add Prices To A Credit Note/Refund



You can enter prices from any price list that you have created. Click on the *Prices* button to add a price to the credit note. If you have created tabs (see *Manage*) then select the tab you require to show the list of prices that you have set up under that heading. The simplest way to add a price is to double click on the row containing the price. This will then enter that price into the grid on the main window.

If you need more than the default quantity of 1 then you can change the amount by clicking in the *Qty.* column and typing the number requires or by clicking on the arrow to the right you can select a quantity from the list that is shown.

To add a price using the tab description highlight a row by clicking on it using the left mouse button and then right mouse click to show a pop up menu. Select *Add Price With Tab Description* and this will place the tab description before the price description in the main window. For example - if the tab has a heading of “16 Seater” and the price description is “Full day sightseeing” then the description in the main window will be “16 Seater Full day sightseeing”.

### Add Free Form Prices To A Credit Note/Refund



Free form pricing allows you to enter prices that are not in any price list that you have set up. It gives a flexibility for those one off pricing situations that are not catered for with set price lists.

Enter the *Item* for the price either by typing into the box or by clicking on the arrow to the right and selecting from the list. Beneath the *Item* enter a description into the *Description* box.

Enter the *Qty.* and then the unit price into the *Price* box. This will show a sub total in the box below.

Enter any discount as a percentage in the box below.

Finally enter any VAT and when you are satisfied that the price is correct click on *OK* to add the price to the main grid.

### Increase/Decrease Quantities In The Grid

You can make changes to the quantities of a price without having to use the *Edit* window. First highlight the row containing the price by clicking on it. Right mouse click on the row to display a pop up menu. Select *Qty. +1* or *Qty. -1* and the quantities will be incremented or decremented by 1.

### Edit A Price Item

Highlight the item that you want to edit and right mouse click to show a pop up menu. From that menu select *Edit Item* and make your changes as required. You also use this window to enter any discounts.

### Delete Item From This Credit

To remove a price highlight the row by clicking on it and then right mouse click to display a pop up menu. Select *Delete Item From This Credit* from the menu.

### Booking Reference

Any prices that haven't been set against a booking reference can be assigned by clicking in the *Booking Ref.* column of the row containing the price. This will show an arrow to the right of the column. Click on the arrow and select from the pop up menu the number of bookings that you want to display. Make your selection from the list that shows and the price will be assigned to that booking.

### Invoice Reference

Each price on the credit note can be set against an individual invoice. This allows a good deal of flexibility where a credit note is raised for several invoices. Click in the *Invoice Ref.* column of the row containing the price. This will show an arrow to the right of the column. Click on the arrow and select from the pop up menu the number of invoices that you want to display. Make your selection from the list that shows and the price will be assigned to that invoice reference.

### Print A Credit Note/Refund

First make sure that you have the correct print template chosen. Click on the *Print* button on the toolbar at the top of the window to preview the credit. If you are satisfied with the pre-view then click on one of the following buttons -

Print - This will send the invoice to the printer for a hard copy of the credit note/refund.

PDF - This will save it as a PDF file which can then be sent to clients as an attachment for an e-mail.

RTF - Use this button if you would like to add or adjust the invoice manually in a word processor.

## ***Aged Debtors***



The *Aged Debtors* window shows all clients with outstanding balances and what age those balances are. The only criteria for a client to be shown on this screen is that they have an outstanding balance.

### Open A Client In The Find Invoices Screen

To view or locate a client's invoice highlight the row containing the clients and then right mouse click on the row to display a pop up menu. Select *Show In Find screen* and all the client's invoices and credits will be listed in the *Find Invoices* window.

### Print An Aged Debtor Summary

This report details the amount of debt owed to you by various clients as totals. It shows the



total amount owed, how old the amounts owed are over 4 periods. To start the report click on the *Print* button on the toolbar at the top of the window.

### *Print A Detailed Aged Debtor Analysis*

The detailed analysis report is similar to the *Aged Debtor Summary* report except that it shows each individual invoice for each client that has a balance owing and how old the balance is. To start the report click on the *Detailed* button on the toolbar at the top of the window.

### *Print An Unpaid Invoice Report*

The unpaid invoice report is a list of invoices between two dates that you select which have balances outstanding.

## ***Payments***



The *Payments* screen shows the details of all payments made between the two dates on the toolbar and by the method selected or by client. Payments can be added, edited, found and matched using this screen.

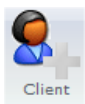
### *Changing Dates*

The payments that are shown in the *Payments* window are between the two dates shown on the toolbar. To show all the payments between two dates change either the *From* date or the *To* date or both by clicking on the arrow to the right of the box and selecting the date from the calendar or by clicking on the date or section of the date and typing or using the arrows to change the date.



### *Client Payments*

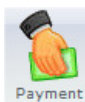
To list a single client's payments click on the button marked *Client* on the toolbar at the top of the screen. To find a client you can either enter the client ID in the left hand box or to find by surname or company name enter the search text in the right hand *Details* box. To select a client double click on the row containing the client and their payments will shown in the *Payments* window. Wildcards are also supported by the entry box (see *appendix ii*).



### *Sort Order*

When the window is first opened the payments shown in the grid are displayed in date order. To see the payments in another order click on the *Header* of the column that you want to sort by.

### *Add A Payment*



To add a payment click on the *Payment* button on the toolbar at the top of the screen. This will display the *Add Payments* screen where you will enter the details for the payment. The first part of entering a payment is to place a clients reference

in the *Client Ref.* box at the top of the window. This sets the payment against a client. If you don't enter a client reference the system will not allow you to proceed any further. Finding a client can be achieved in one of two ways. The first is by entering the client's reference in the *Client Ref.* box. As you enter the alphanumeric characters which make up the reference the system will find the best match until you stop entering characters. If the name and details of the client don't appear in the box below the *Client Ref.* box then the reference you have entered is incorrect. The second method to finding a client is by clicking on the icon to the right of the *Client Ref.* box. This will show the *Clients* window. Single click on the name of a client to show more details. Single click on an icon to display specific items for a client. Use the *Find* box at the top of the window to search for particular clients. As text is inputted into the box the list will grow shorter as all the matches for that text are found. Wildcards are also supported by the entry box (see *appendix ii*). Once the correct client is located double click on the name to enter it into the window. Enter the details of the payment -

**Date** - To enter the date of the payment click on the right of the date box to show a calendar or click on the date or section of the date and type or use the arrows to change the date.

**Amount** - Enter the amount of the payment in the *Amount* box.

**Booking** - Click on the arrow to the right of the *Booking* box and pick the booking that the payment will be for.

**Type** - This shows what type of payment has been made such as a payment or adjustment. To enter click on the arrow to the right of the *Type* box and pick the type from the list shown or type straight into the box.

**Desc.** - This is a description of the payment such as a balance or part payment of the invoice. To enter a type click on the arrow to the right of the *Type* box and pick the description from the list shown or type straight into the box.

**Method** - Click on the arrow to the right of the *Method* box and pick a method of payment from the list shown or type straight into the box

**Invoice** - Enter an invoice number by clicking on the arrow to the right of the *Invoice* box and pick the invoice from the list shown.

**Notes** - Enter any notes for the payment in this box.

**Split** - Click on the *Yes* check box if the payment is part of a split amount.

When you have completed the entries click on the *OK* icon or text at the bottom of the window and the payment will be entered. Click on *Cancel* to clear any entries you have made. Click on *Close Window* when you want to return to the main screen without a payment being entered.

### Edit A Payment

Highlight the payment that you want to edit and right mouse click to show a pop up menu. From that menu select *Edit* and make your changes as required.

### *Find A Payment*



If you want to locate a payment but aren't sure of the details you can click on the *Find* button on the toolbar. From the pop up menu select the method by which you want to find the payment and select or enter the criteria at the next window.

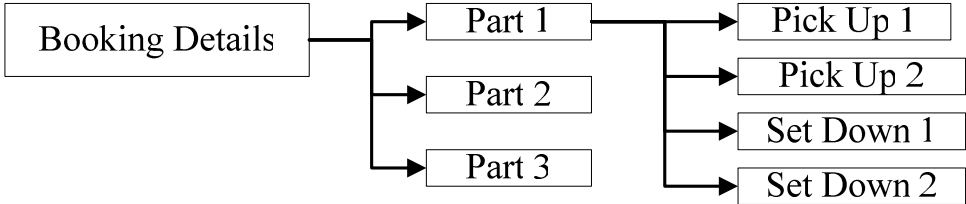
### *Print A Payment Report*

The report will allow you to print out the list currently showing in the window. Click on the *Print* button on the toolbar at the top of the window to preview the report.

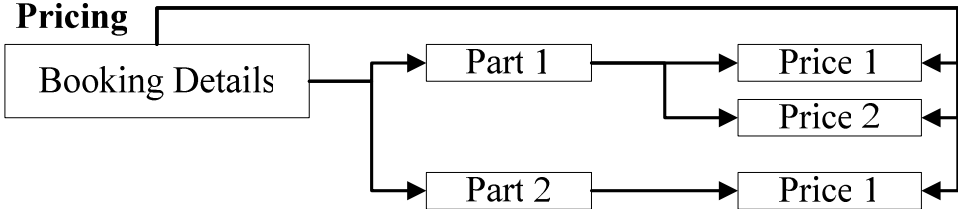
# Appendices

## i) Booking relationships

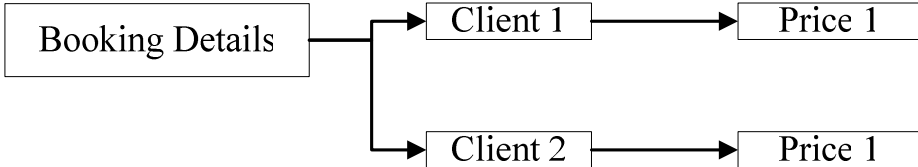
### Bookings



### Pricing



### Tour Clients



## ii) Wildcards

There are two wildcards available, the asterisk \* and the question mark ?. Both act in differing ways. The first replaces all letters wherever it is positioned in the criteria. The following is a list of examples with their possible returns –

\*g - bag, drag, flagging, potholing, hunting, dig

\*ed - bagged, dragged, bed, red

ed\* - edification, edifice, educate

\*g\* - bag, drag, flagging, potholing, bagged, dragged, magic

cr\*m\* - cream, crème, cremate, crumble, cram

The second wildcard, the question mark, replaces only one letter wherever it is placed within the criteria as with the following examples –

b?g - *beg, bag, bog, big*

b??d - *bead, bled, bred, bind*

?top - *stop, atop*

Both wildcards can be used together in any combination for the purpose of restricting data.

### iii) Postcodes

#### **Street address file**

The street address file only gives you the address information for a postcode to street level, e.g. entering a postcode will return - High Street, Anytown, Anyshire. This is the type that is most commonly seen on sale for applications.

When you click on the postcode icon the *Postcode* window is shown. Enter a postcode in the box at the top of the window and click on the *Arrow* icon or *Go* text. All the details for the entered postcode will be shown in the boxes below. You must enter all the other information yourself, organisation, building name and number, from the client. Once you are satisfied with the entry click on the *OK* button and the details will be entered into the relevant section.

#### **Postcode licences**

All postcode data is provided on licence by a third party. For our preferred data supplier and preferential rates see our web site.

### iv) System Requirements

#### **Windows XP upwards**

Widescreen monitor—the program is not set up to be displayed on the older 4:3 monitors.

For speed it is suggested that you use an SSD disk drive for the data particularly if it is part of a network. The greatest bottleneck for speed is with mechanical storage.

Do not rely on automatic back ups to protect your data. If your data fails at 16.30 and your back up backs up at 18.00 then the data that is backed will also be corrupted. This goes for ANY data and for any database. Unless you are prepared to keep several days back ups around then it is advised that you back up to a memory stick every day. This is easy to do via the CoachSys security program.

v) Client Enquiries From Web Forms And Emails

To use the client email function to create a new booking or quote the information must be brought back in the following style from a web site or added manually at the time of entry e.g.

PUD:15-01-2016:                    or PUD:15-01-2016 08.00:  
PHr:8:  
PMin:00:  
Pax:45:  
S1:1 Temple Street:  
S2:Temple Meads:  
S3:Bristol:  
S4::  
S5:BR2 6TG:  
D1:Alton Towers:  
D2::  
D3::  
D4::  
D5::  
JType:Return:  
RD:15-01-2017:                    or RD:17-02-2016 08.00:  
RHr:18:  
RMin:00:  
Lug:No Luggage:  
ContNo:07987 4687:  
Name:Mrs. Fiona Bartlett:  
Email:jb@ymail.com:  
Notes::  
Hear:2:

You do not have to have all the fields shown here but any you do have must conform to the above style. All responses must have colons at the start and ending for the system to recognise the data. Colons cannot be placed in the middle of data. See *appendix vi* for date and time formats.

PUD            Pick Up Date or Pick Up Date and Time  
PHr            Pick Up Hour  
PMin           Pick Up Minutes  
Pax            No. of passengers  
S1            S1 to S5-Start Address  
S2  
S3  
S4  
S5

D1	D1 to D5–Destination Address
D2	
D3	
D4	
D5	
JType	Journey Type–Single or Return
RD	Return Pick Up Date or Return Pick Up Date and Time
RHr	Return Pick Up Hour
RMin	Return Pick Up Minutes
Lug	Luggage definition
ContNo	Contact No. for client
Name	Client name
Email	Client Email
Notes	Any notes from the client
Hear	Source of enquiry

The final item ‘*Hear*’ is the client source and is a numerical character based on the system’s data. The following are the numbers with associated text. You can also add to the list via the system’s management section.

- 1) Previous Client
- 2) Recommendation
- 3)Yell
- 4)Facebook
- 5)Twitter
- 6)Google
- 7)Bing
- 8)Other

#### vi) Date And Time Formats From Web Forms And Emails

Dates can be used in the following formats -

01-02-2016

01/02/2016

01 02 2016

Times should be -

08:00

08.00

8.30pm

## **Licence Agreement**

The term 'CoachSys suite' refers to all and any individual program that comprises the suite. They are CoachSys Booking System, CoachSys Maintenance System and CoachSys Security System. More programs may be added to the suite at later dates.

### **1 Licence Grant**

Michael Fox grants to the customer a non-exclusive, non-transferable right to use the software in accordance with the period of the licence purchased. The licence is non-recurring and only for the period purchased. It is the customer's responsibility to purchase any further licences. Each licence allows the customer to only activate the software according to the details of the licence. These licences are non-transferable.

### **2 Access to the Internet**

The system requires internet access to validate the licence. If there is no access to the internet the customer understands that the system will not start until the system can make a connection to one of our host sites. The customer also understands that there is no workaround for the software should a connection not be present and that Michael Fox will not be responsible should an internet connection fail or not work due to anything within the customer's control, responsibility and domain.

### **3 Purchase of Subsequent Licences**

It is the customer's responsibility to purchase any further licences and no reminders, apart from those generated when the software is activated, will be issued.

### **4 Termination**

This Licence is effective until terminated or it's expiry date is reached. You may terminate it at any point by removing the software and any copies completely from your network system (this includes any underlying database structures and files). Michael Fox also has the option to terminate this Licence if you fail to comply with any term or condition of this agreement. If Michael Fox exercises this option your activation codes will be terminated. Any payments which are overdue or not been made will also result in termination.

### **5 Copyright**

The CoachSys Suite is protected by copyright law. You acknowledge that no title to the intellectual property in the CoachSys Suite is transferred to you. You further acknowledge that title and full ownership rights to the CoachSys Suite will remain the exclusive property of Michael Fox.

### **6 Reverse Engineering**

You agree that no attempt will be made to reverse engineer any CoachSys Suite system by any method of decompilation, translation, or disassembly in whole or in part, except as permitted under Article 6 of EU Software Directive 91/250.

### **7 Warranty**

Michael Fox warrants that the software will perform substantially in accordance with the accompanying manual for a period of 90 days. Any period after 90 days is at the discretion of Michael Fox and may be chargeable.

### **8 Customer Remedies**

If the CoachSys Suite does not conform to the warranty in Section 5 above



('Warranty') Michael Fox's liability and your sole remedy shall be, at Michael Fox's option, either a) to correct the error or b) help you work around or avoid the error. The Warranty is void if failure of the CoachSys Suite has resulted from accident, abuse or misapplication. Any replacement software will be warranted from the remainder of the original Warranty period.

#### 9 **No Other Warranties**

Michael Fox does not warrant that the software is free from error except in accordance with Section 5 ('Warranty') above. This Licence does not infringe your statutory rights.

#### 10 **Severability**

In the event of any invalidation of any provision of this licence the parties to this Licence agree that such invalidation does not affect the validity of the remaining portions of this licence.

#### 11 **Liability For Consequential Damages**

In no event will Michael Fox be liable to you for any consequential, special, incidental or indirect damages of any kind arising out of the delivery, performance or use of the software, even if Michael Fox has been advised of the possibility of such damages. In no event will Michael Fox liabilities for any claim, whether in contract, tort or any other theory of liability, exceed the Licence fee paid by you, if any.

#### 12 **Refunds**

No refunds will be given once the software has been installed and activated.

#### 13 **Governing Law**

This Licence will be governed by the laws of England and is subject to the jurisdiction of the English courts.

## **Terms & Conditions**

### **Maintenance Obligations Michael Fox**

- 1 Michael Fox will provide e-mail support via support@coachsys.co.uk. The e-mail help facility is free at all times with no restriction. Support may not always be continuously available. General enquiries about any part of the system can be sent via e-mail to enquiries@coachsys.co.uk.
- 2 Although every effort is made to respond to support requests within 24 hours this cannot be guaranteed nor will it be part of any contract or part of any terms and conditions between Michael Fox and yourselves (the licence holder).
- 3 Terms Of Support
  - 3.1 Maintenance is available for all versions of the CoachSys suite
  - 3.2 Maintenance is only provided under the following provisions
    - a) Software must be used in accordance with the licence agreement.
    - b) Licenced software has not been altered or modified (including any underlying database structures and files) by the customer, the customer's agent or any third party.
    - c) The customer's operating system, network or any other integral part of the customer's computer environment has remained the same as when the system

was installed.

d) No payment is overdue

Michael Fox reserves the right to change the terms, conditions and pricing for any of the products it sells without notice.