

Collecting CC Payment for Gift Card in CB

Step 1: Log into CB to Create the Res Card

The screenshot shows the Leisure CRM interface for user Karrie Louise Stewart. The 'Res Card' icon in the top toolbar is circled in red, and a large '1' is placed next to it. The interface includes a header with the user's name and contact information, a toolbar with various icons, and a main content area with tabs for General Info, Communications, Remarks, Marketing, Travelers, Activities, Travel History, Cards, Res Cards, Payment History, Attachments, PNR Entries, More Fields, Groups, and Res Card Remarks. The 'Res Cards' tab is currently selected, showing a form for creating a new Res Card. The form includes fields for General Info (Type, Last, First, Middle, Courtesy Title), Address Info (Address 1, Address Line 1, Address Line 2, Zip Code, City, State, Country), Profile Status (Create User, Create Date, Last Modified User, Last Modified Date, Profile Status), and Additional Info (Branch No., Primary Agent, Interface ID, Salutation, Web ID, Web Password, Referred By, Referral, Special Dates).

1) Click on Res Card to open new Res Card

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Step 2: Complete Gift Card Information

The screenshot shows the 'New Res Card' form in the CB system. The form is divided into several sections. At the top, there are summary fields for 'Res Total', 'Invoiced in CB', 'Invoiced Outside CB', and 'Balance', all showing '0.00'. Below this is a toolbar with icons for 'Inv', 'Proposal', 'Itinerary', 'Statement', 'Go To', 'Letter', 'E-mail', and 'Label'. The main form area contains several fields: 'Create Date' (2/26/2020), 'Agent' (BB - Barbara Rhea), 'Status' (Active), 'Reservation Cycle' (Final), 'Marketing Source' (Gift Card), 'Group', and 'Branch No.' ([72] Solo travel management). Below these are fields for 'Prepared for' (Stewart), 'Trip Name' (Gift Card), 'Locator No.', 'Region', 'Destination', 'Trip Start Date', and 'Trip End Date'. The 'Addresses' section includes 'Client Ship To Address' and 'Client Bill To Address', both with 'Use Profile Bill To' checked. The 'Travelers' section lists 'Stewart/Karrie Louise', 'Stewart/Andrew', and 'Stewart/Keith'. At the bottom, there is a 'Reservations' table with columns for 'Booking Status', 'Type', 'Res Date', 'Vendor', 'Reservation Status', and 'Conf #'. The table is currently empty. At the very bottom, there are summary fields for 'Res Total', 'Invoiced Total', 'Balance', 'Comm Total', and 'Net Total', all showing '0.00'. The 'All Confirmed Reservations' summary also shows '0.00'.

1) Reservation Cycle:

Change to Final

2) Market Source:

Select Gift Card from the drop down box

3) Branch Number:

Should default to your branch

4) Trip Name:

Gift Card

5) Click on Apply to apply changes

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Step 2: Continue Completing Gift Card Information

The screenshot displays the 'Res Card' application window. At the top, there are fields for 'Res Total', 'Invoiced Total', and 'Balance', all showing 0.00. Below this, there are dropdown menus for 'Create Date' (2/19/2020), 'Agent' (BB - Barbara Bher), 'Status' (Active), 'Reservation Cycle' (Final), 'Marketing Source' (Gift Card), and 'Branch No.' ([70] Retail Mgt 8KM). The 'Prepared for' section shows 'Stewart/Karrie' for the 'Trip Name' and 'Gift Card' for the 'Locator No.'. The 'Addresses' section includes 'Client Ship To Address' and 'Client Bill To Address', both pointing to 'Karrie Louise Stewart' at '515 S 700 E, Ste 1B, Salt Lake City, UT 84102'. The 'Travelers' list includes 'Stewart/Karrie Louise', 'Stewart/Andrew', and 'Stewart/Keith'. The 'Reservations' table is empty. On the right side, there are buttons for 'Add', 'Modify', and 'Delete', along with a 'Service Fee' button circled in red. A large number '7' is overlaid on the 'Service Fee' button. A warning dialog box is overlaid on the bottom half of the screen, with the text 'Warning: Destination field is not completed. Save Res Card anyway?'. The 'Yes' button in the dialog is circled in red, and a large number '6' is overlaid on it.

6) Click Yes on Destination Field Warning

7) Click on Service Fee

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Step 3: Complete Fee Information

The screenshot shows the 'Reservation' and 'Service Provider' sections of the CB Reservation system. The 'Reservation' section includes fields for Date Reserved (2/26/2020), Booking Status (Confirmed), Vendor (Gift Cards), Travel Category (Miscellaneous), Record Locator (234567689876), and a table for Base, Tax, Commission, and Total Fare. The 'Service Provider' section includes fields for Travel Category (Miscellaneous), Service Provider (Gift Cards), and a description field containing 'Expiration Date - 00/00/00 (Two years from creation of card)'. The 'OK' button is circled in red.

Base	Tax	Commission	Total Fare
500.00	0.00	0.00 %	500.00

- 1) **Vendor:** Change to Gift Card
- 2) **Travel Category:** Change to Misc.
- 3) **Record Locator:** Add 16 digit confirmation number from Gift Card
- 4) **Base & Commission:** Change both to the amount being charged.
- 5) **Travelers Category:** Choose names and No. of Travelers
- 6) **Description:** Add a 2 year Expiration Date
- 7) **Click on OK**

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Continued Completing Fee Information

The screenshot shows the 'Res Card' window in the CB system. The window title is 'Res Card' and the number is 'No. 123138'. The 'Res Total' is 25.00, 'Invoiced Total' is 0.00, and 'Balance' is 25.00. The 'Create Date' is 2/20/2020, 'Agent' is BB - Barbara Bhe, 'Status' is Active, 'Reservation Cycle' is Final, 'Marketing Source' is Gift Card, and 'Branch No.' is [70] Retail Mgt. 8KM. The 'Prepared for' is Stewart/Karrie. The 'Addresses' section shows 'Client Ship To Address' and 'Client Bill To Address' both for Karrie Louise Stewart at 515 S 700 E, Ste 1B, Salt Lake City, UT 84102. The 'Travelers' section lists Stewart/Karrie Louise, Stewart/Andrew, and Stewart/Keith. The 'Reservations' table has one row: Booking Status: Confirmed, Type: Miscella..., Res Date: 2/20/2020, Vendor: Gift Cards. A 'Warning' dialog box is open in the center, with the text 'Destination field is not completed. Save Res Card anyway?' and the 'Yes' button circled in red. The 'Apply' button in the top right corner of the window is also circled in red.

Booking Status	Type	Res Date	Vendor
Confirmed	Miscella...	2/20/2020	Gift Cards

7) Click on Apply

8) Click on Yes to Save Res Card

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Step 4 : Begin Invoice Information

The screenshot shows the 'Res Card' software interface. At the top, the 'Invoice' button is circled in red and labeled with a large '1'. Below this, the 'Insurance Prompt' dialog box is open, displaying the message 'No Insurance Reservations exist for this trip. Accept or Decline Insurance'. The 'Decline' button in this dialog is also circled in red and labeled with a large '2'. The background interface shows reservation details for a gift card, including booking status, dates, and a summary table at the bottom.

Booking Status	Type	Res Date	Vendor	Reservation Status	Conf #	Base	Tax	Cor
Confirmed	Miscella...	2/19/2020	Gift Cards		810582057220	500.00	0.00	500

Summary Table:

	Res Total	Invoiced Total	Balance	Comm Total	Net Total
All Confirmed Reservations	500.00	0.00	500.00	500.00	0.00

1) Select Invoice

2) Decline
Insurance Prompt

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Step 5: Collecting Credit Card Payment

1 →

2

3

4

5

6

Base	Tax	Commission	Total Fare	Base	Tax	Commission	Total Fare
500.00	0.00	500.00	500.00	0.00	0.00	0.00	0.00

Select	Category	Vendor	Traveler	Confirmation No	Depart Date	Return Date	Agent	Traveler Na
<input checked="" type="checkbox"/>	Miscellaneous	Gift Cards	Stewart/Karrie Louise	1111111			BB - Barbara	

Reservation Total		Not yet Invoiced		This Invoice	
Base	500.00	500.00	500.00	500.00	500.00
Tax	0.00	0.00	0.00	0.00	0.00
Comm	500.00	500.00	500.00	500.00	500.00
Total Fare	500.00	500.00	500.00	500.00	500.00

Travel Type: Misc

Submit to: Supplier

Agent: BB - Barbara Bher

Booking Payment [500.00]

Preview Invoice 2/26/2020

Cancel Invoice Format Generate Invoice

1) Highlight the Gift Card by Clicking on the line

2) Form of Payment: Credit Card

3) Add Credit Card from drop down menu. (DO NOT add Credit Card number manually. Add Credit Card to Client profile before invoicing)

4) Travel Type: Miscellaneous

5) Submit to: Supplier

6) Click on Generate Invoice. (Can also generate the invoice from the Preview Invoice page.)

Gift Card Invoice Example:

MORRIS MURDOCK

TRAVEL

DRAFT COPY

Karrie Louise Stewart
64 Keel Court
Stansbury Park, UT 84074-8953
US

Invoice No. :
Invoice Date : 2/19/2020
Travel Consultant : BB - Barbara Bher
Group No. :
Page No. : 1
Interface ID : 4358826927

Miscellaneous

Vendor : Gift Cards Confirmation No. : 810582057220
Booking Status : Confirmed No. of Travelers : 4
Travelers : Stewart/Karrie Louise; Stewart/Andrew; Stewart/Keith; /



Miscellaneous Gift Cards

Description : Gift Card Expiration - 2/20/20

	<u>Total</u>
Reservation Totals	\$ 500.00
Prior Invoiced Totals	\$ 0.00
This Invoice Totals	\$ 500.00
Paid By Credit Card VI 48-XXXX-7696:	\$ (500.00)
Balance:	\$ 0.00

*Internal Vendor Payment Remark - N/A

Thank You For Choosing Morris Murdock Travel

Ask your agent about NEW PASSPORT requirements for International travel beginning December 31st, 2006.

Please review the above information, such as Name Spelling, Dates, Times and Pricing for accuracy.

Initial _____

Taxes and fuel surcharges are subject to change until tickets issued.

I have been offered and I have declined the purchase of: Trip Cancellation (including airline, cruise, and tour operator default) and travel accident/limited sickness/medical/trip interruptions insurance.

I, the undersigned will not hold MORRIS MURDOCK TRAVEL and/or its agents responsible for any expenses incurred by me resulting from delay/cancellation of my trip, accident, sickness, death, stolen or damaged baggage or property.

Client Signature Date _____