

This Guide provides instructions for:

- 1) Cancelled booking (ResCard) that is ON HOLD .
Credit available for later use.
- 2) Modify ResCard and Re-invoice. Time saving
when you have complex ResCard that can be
used later.
- 3) Query ON HOLD Res cards for tracking and
staying organized.

If they cancel **don't ever void** the reservation (Res Card). If you void it and we get anything on that reservation accounting won't be able to find it. So always **change** the res card to **cancel**

STOP Client Reach messages

In order for client reach to work properly, you have to make sure you change the reservation cycle. Go to the drop down and click on the one that pertains.

The screenshot shows a software interface for a reservation card. The 'Reservation Cycle' dropdown menu is open, showing options: Cancel, Closed, COVID CXL, COVID FCC, COVID RBK Deposit, COVID RBK Full Payment, Cxnl - No Refund, and Final. A black arrow points from the text on the left to the 'Reservation Cycle' dropdown. The reservation card displays the following information:

Res Card	Res Total	Invoiced Total	Balance
No. 123719	100.00	100.00	0.00

Fields include: Create Date (3/26/2020), Agent (N5 - Annette Peti), Status (Cancelled), Reservation Cycle (Cxnl - No Refund), Marketing Source, Group, Prepared for (Peterson/Annette), Trip Name (Hawaii), Local (358), Destination, Trip Start Date (5/4/2020), Addresses, Client Ship To Address, Use Profile Ship To, Client Cxnl - No Refund, Profile Bill To, and Tra.

- CIVID CXL = Due to Coronavirus, booking was canceled
- COVID FCC = Future Cruise Credit (use for Future Credit for land tours as well)
- COVID RBK Deposit = trip has been rebooked and under deposit
- COVID RBK Full Payment = Trip has been rebooked and Full payment has been applied.

Res Card instructions for Trips that have been Cancelled and will be rebooked in the future

**This is the Preferred method. However, you can just modify, rather than starting over. See page 4-5

1. Change booking status to cancelled

2. Change Reservation status to on hold

The screenshot shows a software interface for managing reservations. The 'Reservation' section is active, with the 'General' tab selected. The 'Booking Status' is currently set to 'Cancelled' (indicated by a red circle and the number '1'). The 'Reservation Status' is set to 'On Hold' (indicated by a red circle and the number '2'). The 'Date Reserved' is 11/21/2019, and the 'Vendor' is Princess Cruise Lines. The 'Travel Category' is Cruise. The 'No. of Travelers' is 3. The 'Total Fare' is 100.00. The 'Service Provider' section shows the 'Ship' as Princess Cruise Lines. Below this, there is a table with columns for Type, Start Date, End Date, Service Provider, and Code. The table contains one row with 'Cruise' as the Type and 'Princess Cruise Lines' as the Service Provider.

Type	Start Date	End Date	Service Provider	Code
Cruise			Princess Cruise Lines	

3. If you want to add remarks for your client to see click on itin/invoice remarks and that will print on the invoice.

Reservation

General More Taxes Expanded Fare Info Payment Due Date Itin/Invoice Remarks Agent Remarks More Fields Edit History

Date Reserved: 11/21/2019 Booking Status: Cancelled Vendor: Princess Cruise Lines Travel Category: Cruise Live Connect Inventory Group ID: Rate Code: Host:

Invoiced Outside CB Confirmation # 12345 Record Locator Promo ID Booking Method Reservation Status Duration No. of Travelers 3 No. of Cabins

Issued through ARC

Dom/Intl: Charged: Itemize

Travelers	Base	Tax	Commission	Total Fare
Peterson/Annette	100.00	0.00	0.00%	0.00
Peterson/Alex Paul				
Peterson/Amada Ann				
	100.00			100.00

Service Provider

General Itinerary Traveler Details **Itin/Invoice Remarks** Agent Remarks Allocated Pricing

Travel Category: Cruise Ship: Princess Cruise Lines Start Date: End Date:

Category: Deck: Cabin/Room: Dining

Smoking: Description: Bedding

Type	Start Date	End Date	Service Provider	Code
Cruise			Princess Cruise Lines	

4. If you want to add remarks that only you or another agent can see it goes into agent remarks.

2nd
Method

If you have an itinerary with lots of different components and you just need to update this will work.

The screenshot shows a software interface for managing travel reservations. At the top, there's a 'Res Card' section with fields for 'Res Total', 'Invoiced Total', and 'Balance'. Below this are various dropdown menus for 'Create Date', 'Agent', 'Status', 'Reservation Cycle', 'Marketing Source', 'Group', and 'Branch No.'. There are also fields for 'Prepared for', 'Trip Name', 'Locator No.', 'Region', 'Destination', 'Trip Start Date', and 'Trip End Date'. The 'Addresses' section includes 'Client Ship To Address', 'Client Bill To Address', and 'Travelers'. The 'Reservations' section features a table with columns for 'Booking Status', 'Type', 'Res Date', 'Vendor', 'Reservation Status', 'Conf #', 'Base', 'Tax', 'Comm', 'Total Fare', 'Charge As', 'Booking Method', and 'Start Date'. A red circle highlights the 'Modify' button in the bottom right corner of the interface.

Booking Status	Type	Res Date	Vendor	Reservation Status	Conf #	Base	Tax	Comm	Total Fare	Charge As	Booking Method	Start Date
Confirmed	Tour	3/26/2020	Delta Vacations		3487	100.00	0.00	1.00	100.00			

1

1. Highlight the reservation.

2

2. Click on modify.

2nd
Method

General More Taxes Expanded Fare Info Payment Due Date Itin/Invoice Remarks Agent Remarks More Fields Edit History

Date Reserved: 3/26/2020 Booking Status: Confirmed Vendor: Delta Vacations Travel Category: Tour Live Connect Inventory Group ID Rate Code Host

Invoiced Outside CB Confirmation # 3487 Record Locator Promo ID Booking Method Reservation Status Duration No. of Travelers 3
 Issued through ARC

Dom/Int'l Charged Itemize

Travelers	Base	Tax	Commission	Total Fare
Peterson/Annette	100.00	0.00	0.00 %	1.00 0.00 % 100.00
Peterson/Alex Paul				
Peterson/Amenda Ann				

Service Provider

General Address Itinerary Traveler Details Itin/Invoice Remarks Agent Remarks Allocated Pricing

Travel Category: Tour Service Provider: Delta Vacations Start Date End Date

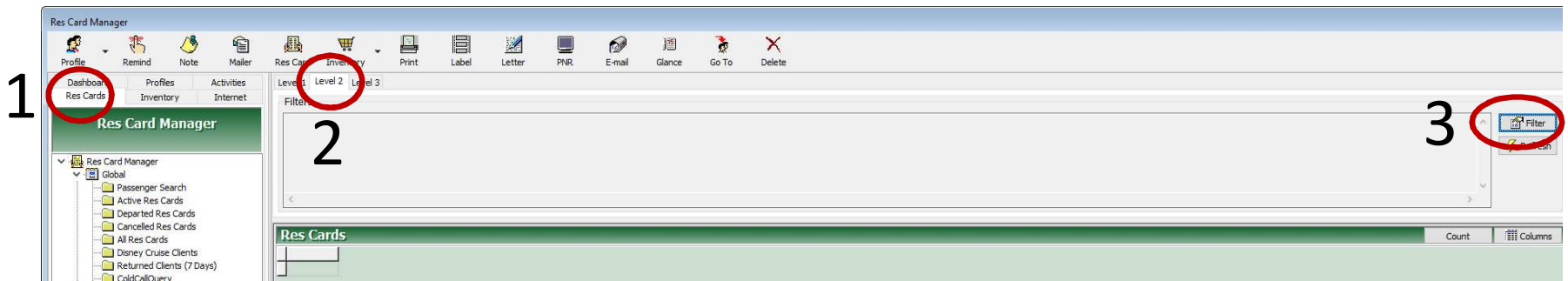
Tour Name
Tour Description

Type	Start Date	End Date	Service Provider	Code
Tour			Delta Vacations	

You will then come to this page. You can update whatever needs to be updated and then click **okay**, down at the bottom of the page. Once you do this you **must** do an invoice on the **new reservation** or **it won't go to back office and accounting won't see anything**.

Query

Later, you can Query cancelled/On Hold Bookings



1. Click on Res cards

2. Level 2 Query.

3. Filter

4. Enter your productivity sign.

5. Enter Cancelled in the Booking Status box

6. Enter 'On Hold' under Reservation Status.

7. Click OK

Note – Adding Dates may help narrow down

4

5

6

7

8. Click refresh

Level 1 Level 2 Level 3

Filters

*** Res Cards
... Res Card Filters
Agent Name Is Equal to "XM - Linda Hofer"

... Reservation Filters
Booking Status Is Equal to Cancelled
Reservation Status Starts With "On Hold"

Filter Refresh

Res Cards

Status (RESCARD)	Trip Name (RESCARD)	Trip Start Date (RESCARD)	Name (PROFILE)	Modified Date (PROFILE)	Conf # (RESERVATION)
Active		3/21/2020	Woods,Ernest	3/19/2020 4:47:19 PM	
Cancelled	Australia & New Zealand	3/18/2020	Ross/Ann	11/14/2019 12:29:56 PM	1217752736
Cancelled	Australia & New Zealand	3/18/2020	Ross/Ann	11/14/2019 12:29:56 PM	274988
Cancelled	Australia & New Zealand	3/18/2020	Ross/Ann	11/14/2019 12:29:56 PM	805369
Cancelled	Classic Ireland	5/29/2020	Rogers/Nikki	12/9/2019 12:27:36 PM	519924-1
Cancelled	Costa Rica	4/18/2020	Ask/Wayne & Pam	2/13/2020 10:44:52 AM	1219845284
Cancelled	Costa Rica	4/18/2020	Ask/Wayne & Pam	2/13/2020 10:44:52 AM	1219845507
Cancelled	Costa Rica	4/18/2020	Ask/Wayne & Pam	2/13/2020 10:44:52 AM	16125717
Cancelled	Costa Rica	4/18/2020	Free/Laura	12/13/2019 5:16:28 PM	A6G570E3
Cancelled	Disneyland w Mum	4/24/2020	Jares/Ben & Jayme	12/30/2019 4:02:29 PM	X39EG0E3
Cancelled	Elegance of the Nile	4/8/2020	Taylor/Sandy & Dick	1/20/2020 5:59:40 PM	1215959951
Cancelled	Elegance of the Nile	4/8/2020	Taylor/Sandy & Dick	1/20/2020 5:59:40 PM	A008864
Cancelled	Elegance of the Nile	4/8/2020	Taylor/Sandy & Dick	1/20/2020 5:59:40 PM	B518675
Cancelled	Excellence Mujeres 'HNY'	4/18/2020	Wittman/Becky	1/7/2020 9:33:25 PM	16080495
Cancelled	Excellence Mujeres 'HNY'	4/18/2020	Wittman/Becky	1/7/2020 9:33:25 PM	942930159
Cancelled	Kids Cruise and Disney	4/4/2020	Rolison/Guy	1/3/2020 6:33:13 PM	3112029
Cancelled	Kids Cruise and Disney	4/4/2020	Rolison/Guy	1/3/2020 6:33:13 PM	5588074
Cancelled	Kids Cruise and Disney	4/4/2020	Rolison/Guy		
Cancelled	Kids Cruise and Disney	4/4/2020	Rolison/Guy		
Cancelled	New York	4/28/2020	Brunne		

**** Note - You can add columns to quickly see important information without going into each res card. Just right click anywhere on the header line, then add columns.**

