

<b>Title</b>	User Guide Manual - Service Module For Branches
<b>Version No</b>	1.1
<b>Modified On</b>	06-Jun-2013
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**Revision History**

Version No	Date	Prepared by / Modified by	Significant Changes
Draft	14-May-2013	Aman Kumar Vats	First Draft
0.1	14-May-2013	Aman Kumar Vats	Updated based on comments from Rajesh
1.0	14-May-2013	Aman Kumar Vats	Updated as per review comments from Rajesh
1.1	06-Jun-2013	Aman Kumar Vats	Updated for <a href="#">Section 4.5</a>

**Glossary**

Abbreviation	Description
IT	Information Technology
BO	Branch Office
MO	Main Office
BOFH	Branch Office File Handler
FHE	File Handling Executive
KDM	Kuoni Destination Management
Xplor DB	Xplor Database

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## 1 Introduction

### 1.1 Purpose

The purpose of this document is to describe & explain step by step process / workflow on “How to use Service Module for Branches”. Service Module for Branches is new implementation in Xplor application to achieve **class by SITA** benchmarks. This new functionality will bring in action efficiency in processes and improve seamless workflow.

The business objective of Service Module is to capture Step by Step Information for all the services like Hotel /Transport / Guide / Other services which need to be booked / confirmed through Branch offices like Jaipur / Agra etc.

### 1.2 Scope

The scope of this document is to cover the description on step by step action needed in order to use the Service Module for Branches. By no means, this document considered as a user guide on Xplor other functionality. There may be many scenarios which can only be understood via class room training on Service Module.

### 1.3 Intended Audience

Main audience includes,

1. KUONI IT Team,
2. Xplor Support and Maintenance Team
3. Various Branch Office Manager
4. Operation Team, KDM Gurgaon

## 2 Overview on Service Module for Branches

FHE will create the Sub file code based on the city for which he wants to send the request which can be booked /confirmed / reconfirmed by the Branch office. City list will be based on various cities coming under a specific tour.

FHE and Local Office will get the email alert step by step on every action on service request BO Users and FHE has the various statuses which he can update based on the request. Transport service module also integrated with this, where transport service will populate automatically, once the FHE send the request.

The following are the forms, which are contained in the Service Module for branches:

- 1) Approve Quotation or Generate File code
- 2) View Sub-File code
- 3) Service Request to Branch Office

4) Update Information to Service Request

5) BO Movement Chart

The details about each of the above forms are described in the section, this point onwards.

### 3 Key Common Functions

Key Common Functions are the functions which are applicable for all the screens. These are the functions which facilitate the user to browse menu, add new record, Search record & Navigate through various pages or records

#### SCOPE

The scope of the Key Common Function is applicable to all the screens with the similar usability.

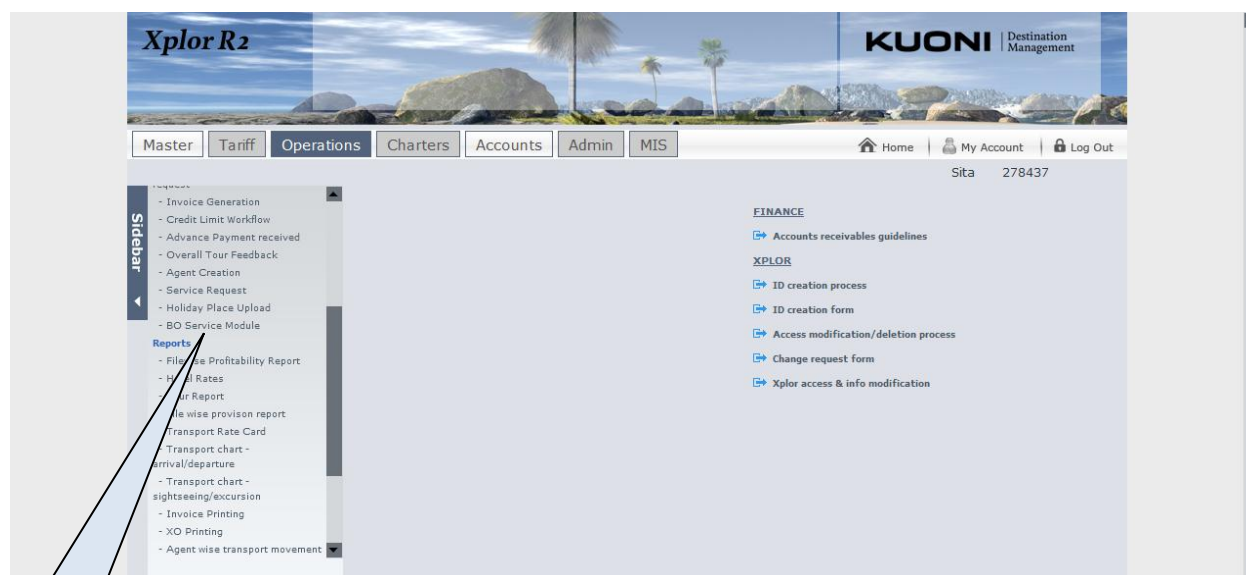
The following are Key Common Functions:

- Sidebar on the List screen
- Filter
- Next page, Previous page, Last page & First page
- Records per page
- View detail
- Save
- Cancel

S. No	Field Name	Example	Description
1	Sidebar	Click on the Sidebar	It displays the menu of a particular module. User can browse & open specific screen by clicking on the menu list.
2	Filter	Sub File Code	This function facilitates the user to search specific record, record which contains specific value or record which starts with particular value. This function facilitates the user to Apply filter, Hide filter & Remove filter
3	Next page, Previous page, Last page & First page	Next	It takes the user to the page that user wants to view. By clicking on any of the button, system will take the user to the specific page. In this case system will take the user to the Next page.
4	Records per page	50	It displays the number of record the user wants to view on the same screen. User can view records per page as 5, 10, 15, 20, 25, 50 In this case system will display 50 records on the screen with the option to scroll records.
5	View detail	Click on Sub File code	It takes the user to the Detail screen of the record displaying all the relevant

			information saved for the particular record.
6	Save /Submit	Click on Save / submit button	It saves the new record entered or existent record edited & takes the user to the List screen. It takes place on the Detail screen
7	Cancel	Click on Cancel	It takes the user to the List screen from the detail screen without making any changes in the record.

### Link for Branch Service Module for FHE



Click on BO Service Module to view the Sub File Code s

## 4 Service Module Work Flow

### 4.1 Step 1- Generate File Code & Sub-File Code(s)

#### Screen for Generate File code/ Sub Filecode:

**Xplor R2** | **KUONI** | Destination Management

Master | Tariff | **Operations** | Charters | Accounts | Admin | MIS

Home | My Account | Log Out

Sita 278539

**Approve Quotation**

Quotation No: 177452 - Branch Office Demo Aman

Feedback Form Collected by: N/A - Not Applicable | Cancel Tour ☐

Extension: ☐

Choose City For Sub-File Code: ☒ Select All City

☒ AGRA ☒ JAIPUR

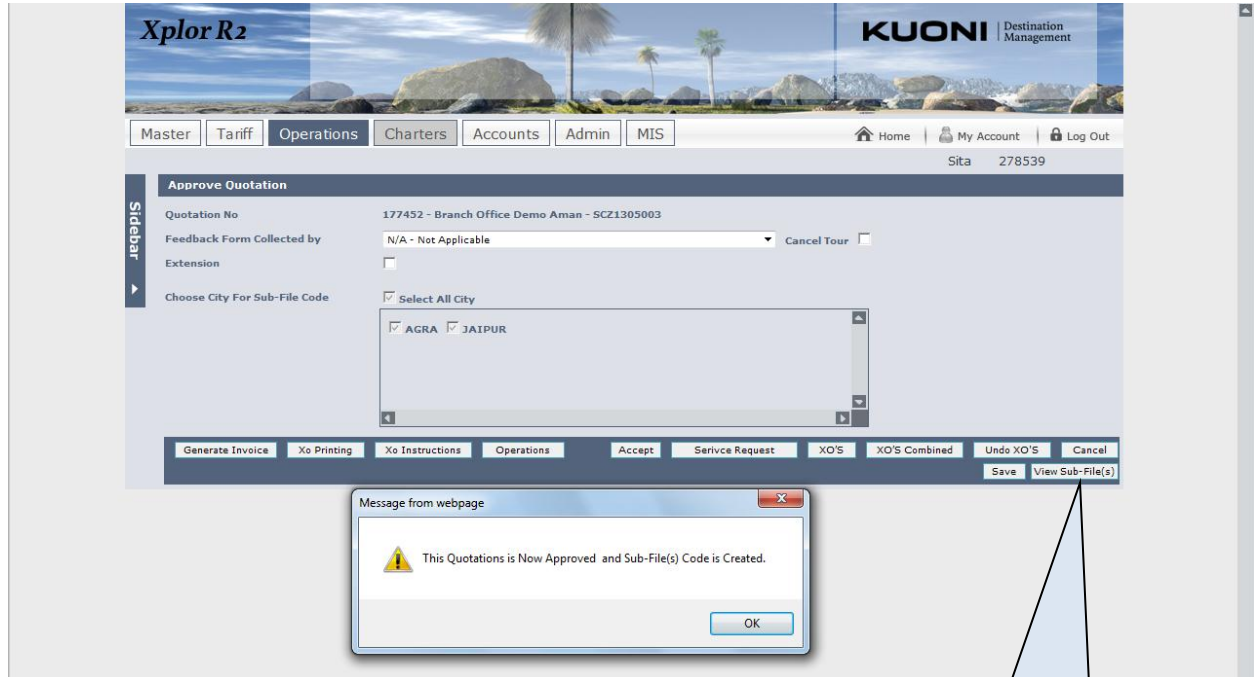
Generate Invoice | Xo P | Xo Instructions | Operations | Accept | Service Request | XO'S | XO'S Combined | Undo XO'S | Cancel | Save | View Sub-File(s)

Cities used under the Quotation

User can click on Select All city or click on individual city for which sub file code needs to be generated and services needs to be sent to local offices.

- 1) Click on the city for which Sub file code needs to be created
- 2) Click on Accept button
- 3) System will generate the File code and Sub File codes and display the message

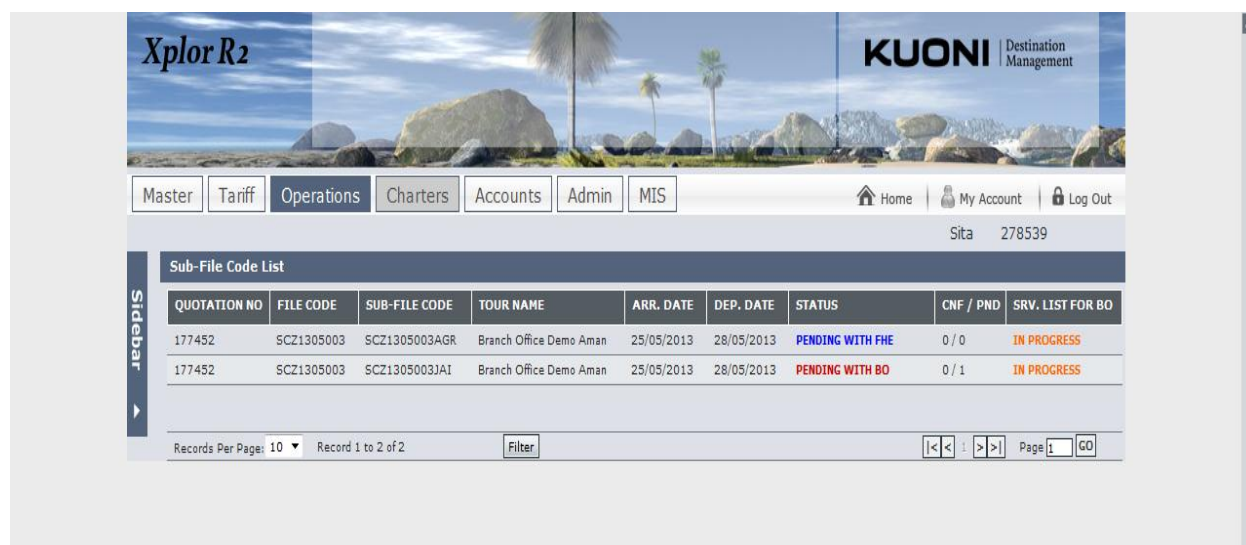
- 4) View Sub file(s) button will get appeared on the screen and cities shown the box get disabled for which sub file code has been generated
- 5) Click on the button to view the sub file codes generated.



Button gets appeared only after sub file code generated. Click to view sub file code list



## 4.2 Step 2 – Sub-File Code Created & Displayed In Grid View



Fields Description As Shown In Above Screen Shot,

S. No	Field Name	Example	Description
1	Sub File Code	<a href="#">SCZ1305003JAI</a>	When click on sub file code it opens the detailed screen of services
2	Status	Pending with FHE	This grid column explains whether the request has been sent to local office or not. Also the colour code is associated with the column if no request is sent than the colour will be Blue, request sent to BO than colour will be maroon, if all request sent than colour will be Green
3	CNF/PND	0 / 1	This means one request has been sent to local office and is not confirmed.
4	Srv. List for BO	IN PROGRESS	This means all the request are to be Sent / confirmed by FHE / BO User

### 4.3 Step 3 – Send Service Request to BO

Click to enter details for Flight / Train / vendor / vehicle / rep

**Service Request To Branch Office : ( SC21305003JAI - Branch Office Demo Aman )**

**Hotel**

Day	Date	Hotel	Room Type	Meal	SGL	DBL	TWN	Srv. Request Status	Remarks
2	26/05/2013	RAMBAGH PALACE	ROYAL SUITE	CP - Continental Pla...	0	1	0	BO To Book	

**Transport**

Day	Date	Vendor	Service	Veh. Specification	Srv. Request Status	Remarks
2	26/05/2013	Services Office Jaipur	FDSSAMEEOJ - FULL DAY CITY SIG...	LARGE COACH	BO To Book	

**Guide**

Day	Date	Vendor	#	Remarks	Created By	Created On	Status	Remarks
1	25/05/2013	Niraj Kumar	1	Please book & Confirm	MO - Aman Vats	13 May 2013		

**Other Service**

Day	Date	Vendor	Services	Language	Srv. Request Status	Remarks
2	26/05/2013	Nirbhair Singh	JAIGARH FORT	ENGLISH	--Select--	

Close Complete Cancel

View all remarks Image used to view the remarks entered by FHE / BO users

**Guide**

Day	Date	Vendor	Services	Language	Srv. Request Status	Remarks
1	25/05/2013	Niraj Kumar	FD - Full Day	ENGLISH	--Select--	Not Applicable

**Other Service**

Day	Date	Vendor	Services	Minor	Adult	Srv. Request Status	Remarks
2	26/05/2013	Nirbhair Singh	JAIGARH FORT	0	1	Not Applicable	

☒ Srv. List For BO Is Complete Send Cancel

When it is ticked status for all services not sent becomes Not Applicable

Fields Description As Shown In Above Screen Shot,

S. No	Field Name	Example	Description
1	Srv. Request Status	BO to Book	Various statuses FHE / Bo User can select like BO to Book, Booking Confirmed by BO, etc..
2	Remarks	Please Book and confirm	Remarks box is used to put any kind of remarks by FHE & BO User
3	Srv. List for BO to Complete	Check box ticked	Used to complete the service sent to Local Office
4	Srv. Request Status	FHE	FHE can select only BO to book, BO to Reconfirm, FHE Cancels, BO to Cancel and Not applicable
5	Srv. Request Status	BO Users	BO Users can select only Booking Confirmed by BO, Waiting Req. by BO, Cancel Confirmed by BO, Not Available
6	Srv. Request Status	BO Users	Before confirming the Transport Services BO User has to fill in the details of vendor.
7	Srv. Request Status Guide	BO Users	Guide is Mandatory before confirming the request

#### 4.3.1 After Sending Request, Immediate Action by FHE

Once FHE has send the Service request list, and if this list includes Transport request also then FHE need to update 2 information on Transport Requisition Form

The screenshot shows the 'Update Information To Service Request' form in the Xplor R2 application. The form has a search section with 'From Date' (15/05/2013), 'To Date' (15/05/2013), 'File Code', and 'Tour Name' fields, along with a 'Search' button. Below the search section is a table with the following columns: Sub-File Code, File Handler, Service Type, Tour Name, Pax, Flt/Train Name, Arr.Dep. / ET, Vendor Name, Vehicle No., Driver Name/Mobile, Rep Name, Rep Mobile No., and Pickup Time. The first row of data shows: SCZ1305003JAI, Aman Vats, FDSSAMEEO3 - Branch Of..., 2, [empty], 14/05/2013, [empty], [empty], [empty], [empty], [empty], [empty], and [empty]. A callout bubble points to the 'Arr.Dep. / ET' field, stating: 'FHE can only enters the Flight Train Details and Estimated Time'.

FHE will update Flight Train details and Estimated Time Only.

### 4.3.2 Bo User Updates the Details before confirming to FHE

Branch Office will update Vendor Name / Vehicle details / Rep name and Pick Up Time

The screenshot shows the 'Xplor R2' web application interface. The top navigation bar includes tabs for Master, Tariff, Operations, Charters, Accounts, Admin, and MIS. The user is logged in as 'Sita' with ID '278703'. The main section is titled 'Update Information To Service Request'. It contains search filters for 'From Date' (17/05/2013), 'To Date' (17/05/2013), 'File Code', and 'Tour Name'. Below these is a table with columns: Sub-File Code, File Handler, Service Type, Tour Name, Pax, Flt/Train Name, Arr.Dep. / ET, Vendor Name, Vehicle No., Driver Name/ Mobile, Rep Name, Rep Mobile No., and Pickup Time. The first row of data shows 'SBP1305001JAI', 'Aman Vats', 'FDLRJAI - FULL ...', 'TEST 2 AM...', '2', 'T-123', '16/05/2013 10:00', and 'NS TAXI'. A dropdown menu for 'Vendor Name' is open, showing a list of vendors including 'Mann', 'Marico', 'Mars Travelport', 'New India Travels', 'NS TAXI' (highlighted), 'OFFICE INNOVA', 'Om Tours', 'Om Transport Service', 'Overtime', 'Pleasant Holiday', 'PSPT', 'PTT', 'RAINBOW', 'Royal Support Services', 'RR Travels', 'S K TOURS', 'S R Tours', 'S T TRAVEL', 'Sanoli', 'Satkar', 'Saurab Taxi', 'Shakti Tours', 'Shanti Tour', 'Ten Travels', 'Tokas', 'Tour-aids Agra', 'TRAVEL HOLIDAYS', 'Travel India/Deepta Tours', 'Travel World', and 'V K Travels'. A callout bubble points to the dropdown with the text: 'BO User Updates the Details like vendor/Vehicle etc.'

Once the BO User update the Vendor details then the check box in the Confirmation screen get ticked automatically and BO can confirm the request.

Transport						
Day	Date	Vendor	Service	Veh. Specification	Srv. Request Status	Remarks
1	15/05/2013	Services Office Jaipur	FDLRJA1 - FULL DAY LOCAL RUN (...)	TOYOTA INNOVA	<input checked="" type="checkbox"/> Booking Conf	

BO User Updates the Status

Similar way Guide is mandatory before confirming the Guide to FHE

Guide						
Day	Date	Vendor	Services	Language	Srv. Request Status	Remarks
1	25/05/2013	Niraj Kumar	FD - Full Day	ENGLISH	SANJAY S <input checked="" type="checkbox"/> Booking Conf	

Guide is Mandatory

**Xplor R2** **KUONI**

Master | Tariff | Operations | Charters | Accounts | Admin | MIS

Home | Account | Log Out | 278539

Service Request To Branch Office : ( SC21305003JAI - Branch Office Demo Aman )

**Hotel**

Day	Date	Hotel	Room Type	Meal	SQL	DBL	TWN	Srv. Request Status	Remarks
2	26/05/2013	RAMBAGH PALACE	ROYAL SUITE	CP - Continental Pla...	0	1	0	BO To Book	

**Transport**

Day	Date	Vendor	Service	Veh. Specification	Srv. Request Status	Remarks
2	26/05/2013	Services Office Jaipur	FDSSAMEOJ - FULL DAY CITY SIG...	LARGE COACH	BO To Book	

**Guide**

Day	Date	Vendor	#	Remarks	Created By	Created On	Status	Remarks
1	25/05/2013	Niraj Kumar	1	Please book & Confirm	MO - Aman Vats	13 May 2013		

**Other Service**

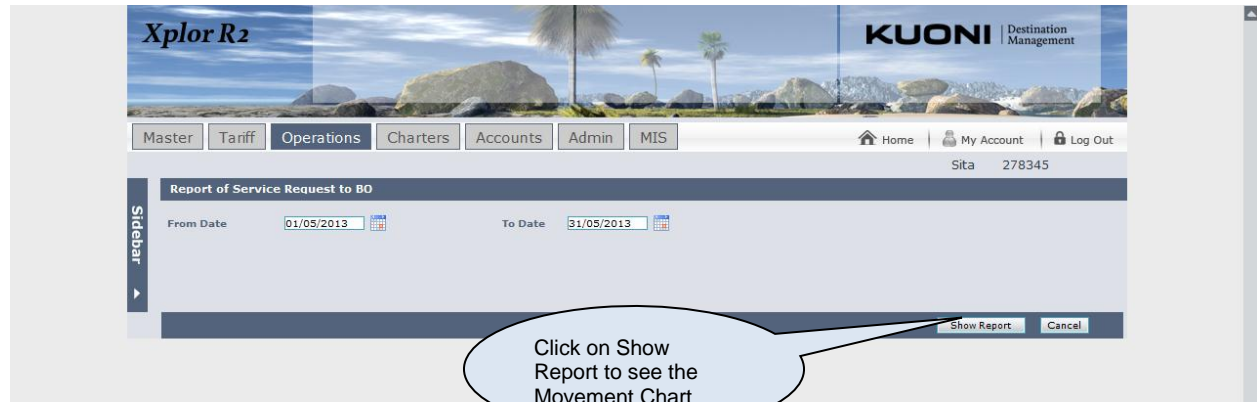
Day	Date	Vendor
2	26/05/2013	Nirbhaj Singh

Close Complete Send

Click to enter details for Flight / Train / vendor / vehicle / rep/

View all remarks Image used to view the remarks entered by FHE / BO users

## 4.4 Step 5 – Generate Movement Chart for BO



http://delapt01/Xplor2Test/ShowReport.aspx?id=f81f8125b5e317912a2bd480b1d397e9e3d1e6665b2837cbf7cacf0eb3ba10d

Mail Report Close[x]

Find... 1 of 1 100%

Main Report

**TRANSFER DAIRY**

DAY :  
DATE : 14-May-2013

Name of FIT/Group	Division	Total Pax	Arrival Details			Departure Details			Hotel Name	Rep.	Transport Car(s) Coach(es)	Contr actor	Sight Seeing	Guide	Remarks
			From	Flt./Train	Time	To	Flt./Train	Time							
SCZ1305003 - Branch Office Demo Aman - 09818366772	KTO	2				JAIPUR	SG 303	14:00	TAJ GATEWAY HOTEL	Aman Vats - 09818366772	JAIPUR	KTO	FDSSAM EEOJ	SANJAY SHARMA	
SCZ1305003 - Branch Office Demo Aman - 09818366772	KTO	2				JAIPUR	SG 303	14:00	RAMBAGH PALACE	Aman Vats - 09818366772	JAIPUR	KTO	FDSSAM EEOJ	SANJAY SHARMA	
SBP1305001 - TEST 2 AMAN SERVICE MODULE FOR	KTO	2				JAIPUR	T-123	10:00	THE LALIT JAIPUR		JAIPUR	KTO	FDLRJAI		

Page 1 of 1

4:45 PM 5/14/2013

## 4.5 Attachment a File to a Service Request

As a part of BO Service Module enhancement there are 2 new implementations done,

1. Facility to attach a file to any specific service request under Sub File. And also colour coded representation for any newly added attachment.
2. Colour code representation for any new remarks.

Below section explain on attachment process. The same holds good for remarks also, except user cannot delete any remarks once added.

FHE and BO Users can attach the documents by using attachment facility.

**Xplor R2** **KUONI** Destination Management

Master | Tariff | Operations | Charters | Accounts | Admin | MIS | Home | My Account | Log Out

Sita 278539

Service Request To Branch Office : ( SCZ1307001-JAI - User Manual for BO Service Module )

**Hotel**

Day	Date	City	Hotel	Room Type	Meal	SGL	DBL	TWN	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	RAMBAGH PALAC...	ROYAL SUITE	CP - Continental Pla...	0	2	0	BO To Book	Pleesefind attachment	
2	04/07/2013	JAIPUR	RAMBAGH PALAC...	ROYAL SUITE	CP - Continental Pla...	0	2	0	Open		

**Transport**

Day	Date	City	Vendor	Service	Vehicle Spec	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	Services Office Jaip...	FDSSAMEEOJ - FULL DAY CIT...	MEDIUM CAR	Open		

**Guide**

Day	Date	City	Vendor	Services	Language	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	Services Office Jaip...	FD - Full Day	ENGLISH	--Select-- Open		

**Other Service**

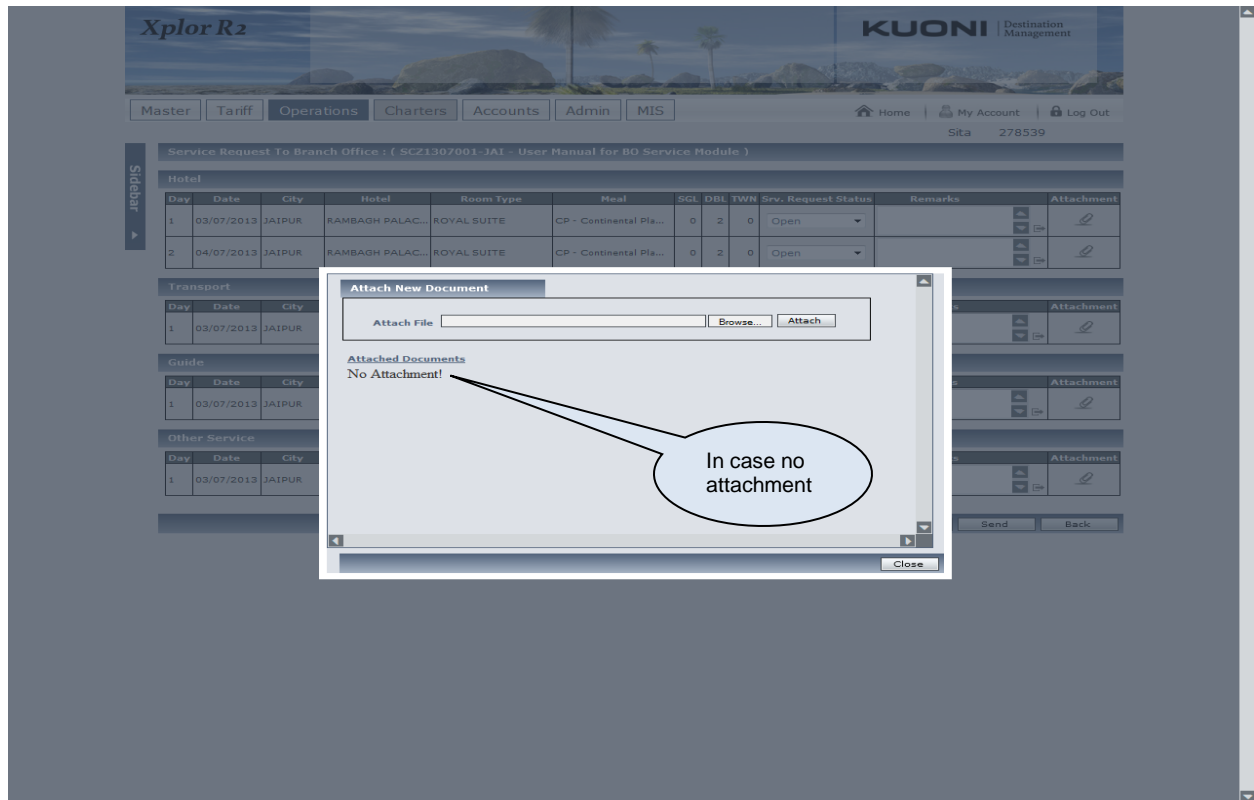
Day	Date	City	Vendor	Services	Minor	Adult	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	Services Guide - Jaipur	AMBER FORT	0	1	Open		

☐ Srv. List For BO Is Complete View Report XO Send Back

Click Here To Open Attachment Form



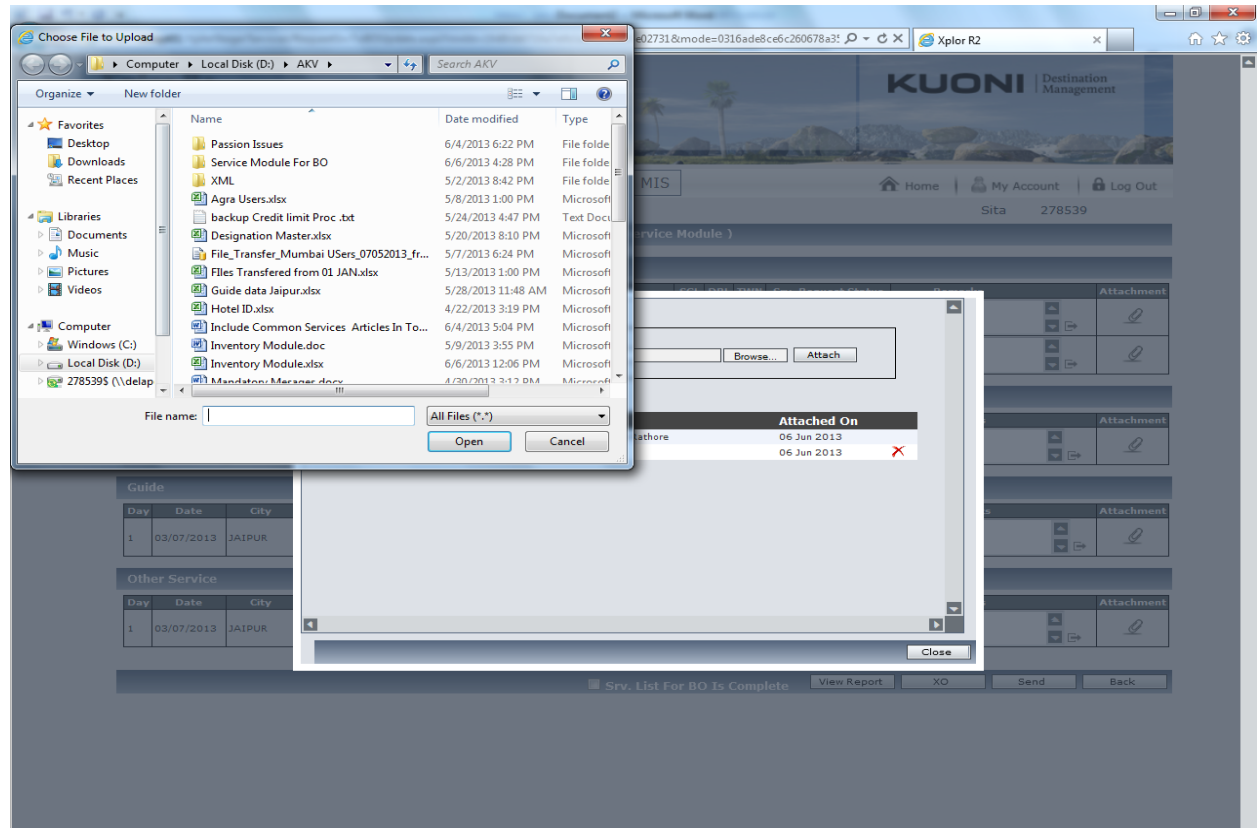
When User clicks on Attachment Image, a popup will get open to attach the file, as shown below



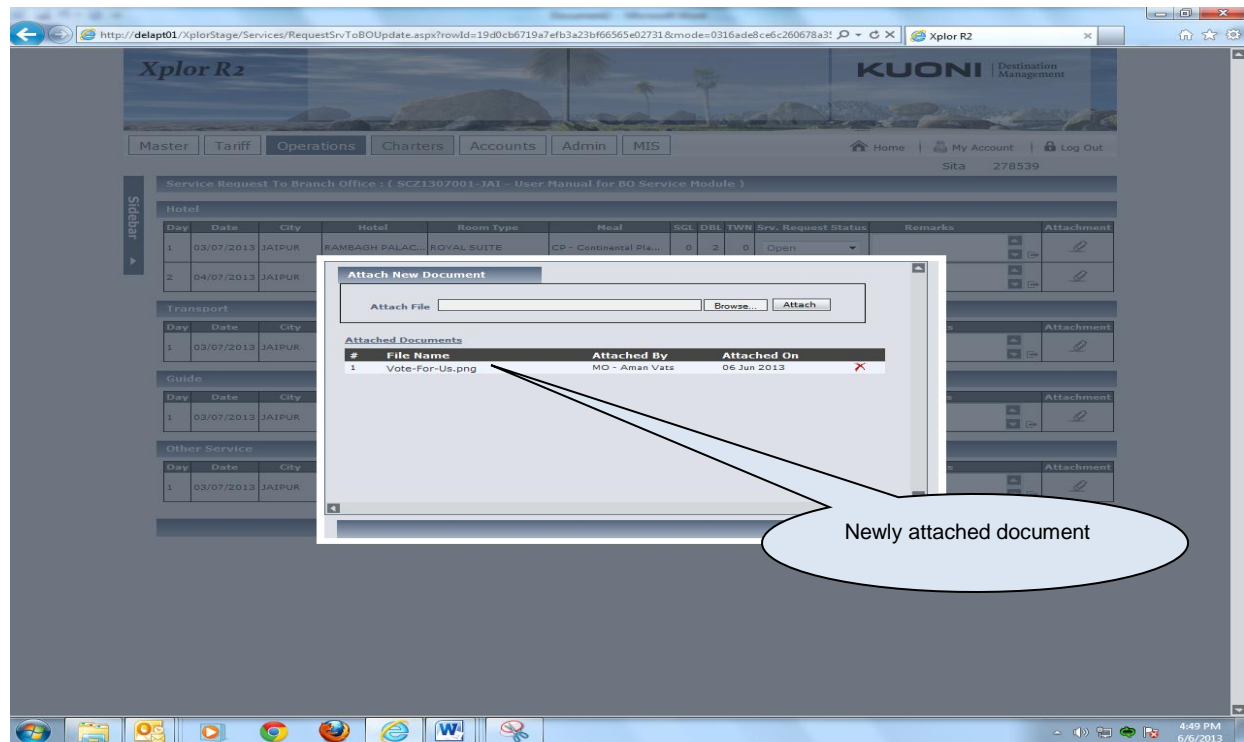
Let's assume user wants to attach a file, please perform standard steps for attachment as,

1. Click on browse
2. Select a file from directory
3. Then click on attach

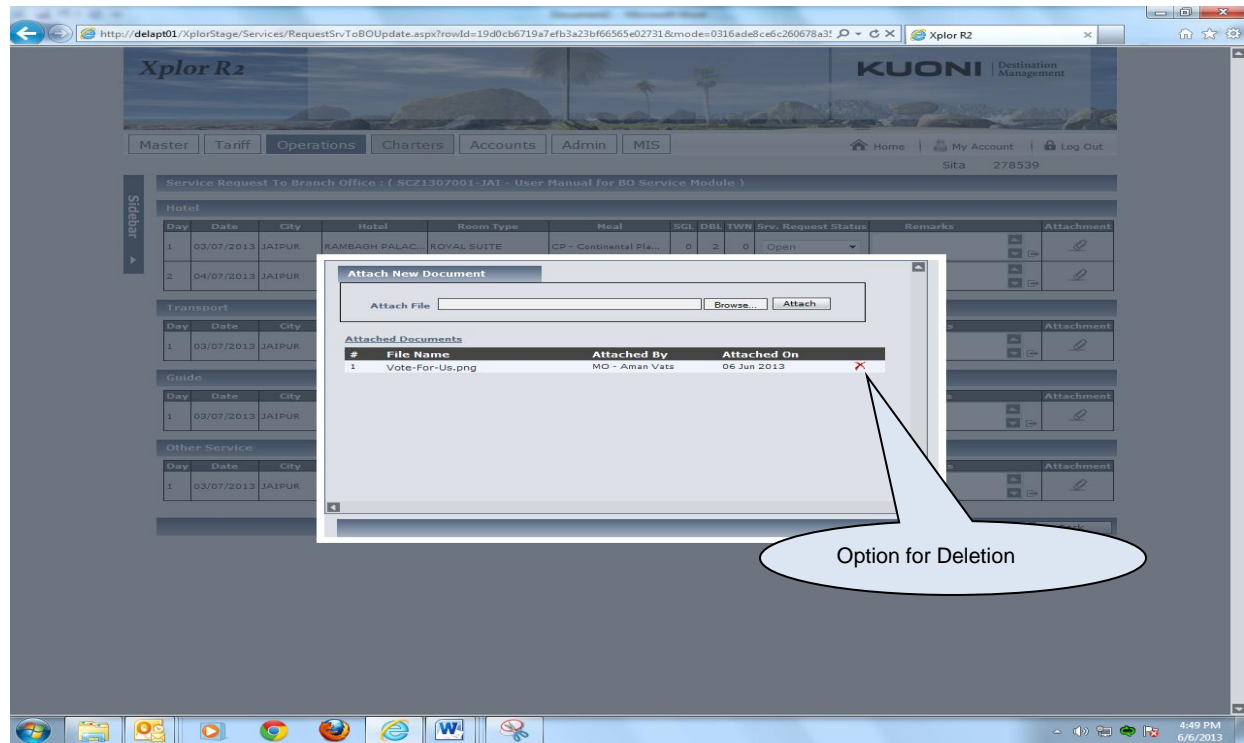




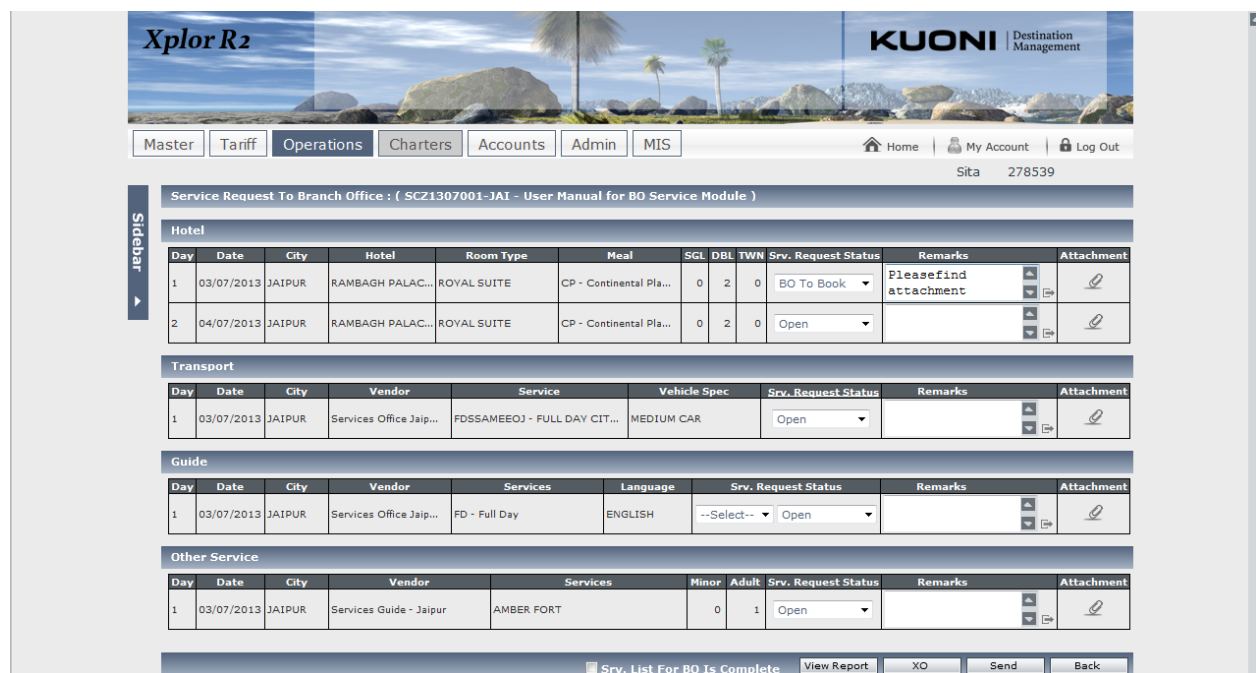
File is attached successfully and gets displayed under section as shown in screen shot below.



On the same screen, User has facility to delete the attached file also, **but only** those files which are attached by him/her only. User **cannot** delete any files which are attached by other User, they can only see it.



After attachment, click on close, popup form closes and user is again back to parent screen.



Please NOTE that colour of the attachment image still remains same for user, who has just attached a new attachment.

At the same if after form reloads and User sees a Green attachment image for any of the line items then it means someone else has attached a new attachment to the same sub file. In nut shell, image colour changes to green for other if a new attachment is made by one user. Therefore let assume now the BO office has opened the sub file. As shown below. The attachment mage for the line item where NEW attachment is made by FHE is shown in Green, others in Grey.

**Xplor R2** | **KUONI** | Destination Management

Master | Tariff | Operations | Charters | Accounts | Admin | MIS | Home | My Account | Log Out | Sita 278711

Service Request To Branch Office : ( SC21307001-JAI - User Manual for BO Service Module )

**Hotel**

Day	Date	City	Hotel	Room Type	Meal	SCL	DBL	TWN	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	RAMBAGH PALAC...	ROYAL SUITE	CP - Continental Pla...	0	2	0	BO To Book		

**Transport**

Day	Date	City	Vendor	Service	Vehicle Spec	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	Services Office Jaip...	FDSSAMEEOJ - FULL DAY CIT...	MEDIUM CAR	BO To Book		

**Guide**

Day	Date	City	Vendor	Services	Language	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	Services Office Jaip...	FD - Full Day	ENGLISH	--Select-- BO To Book		

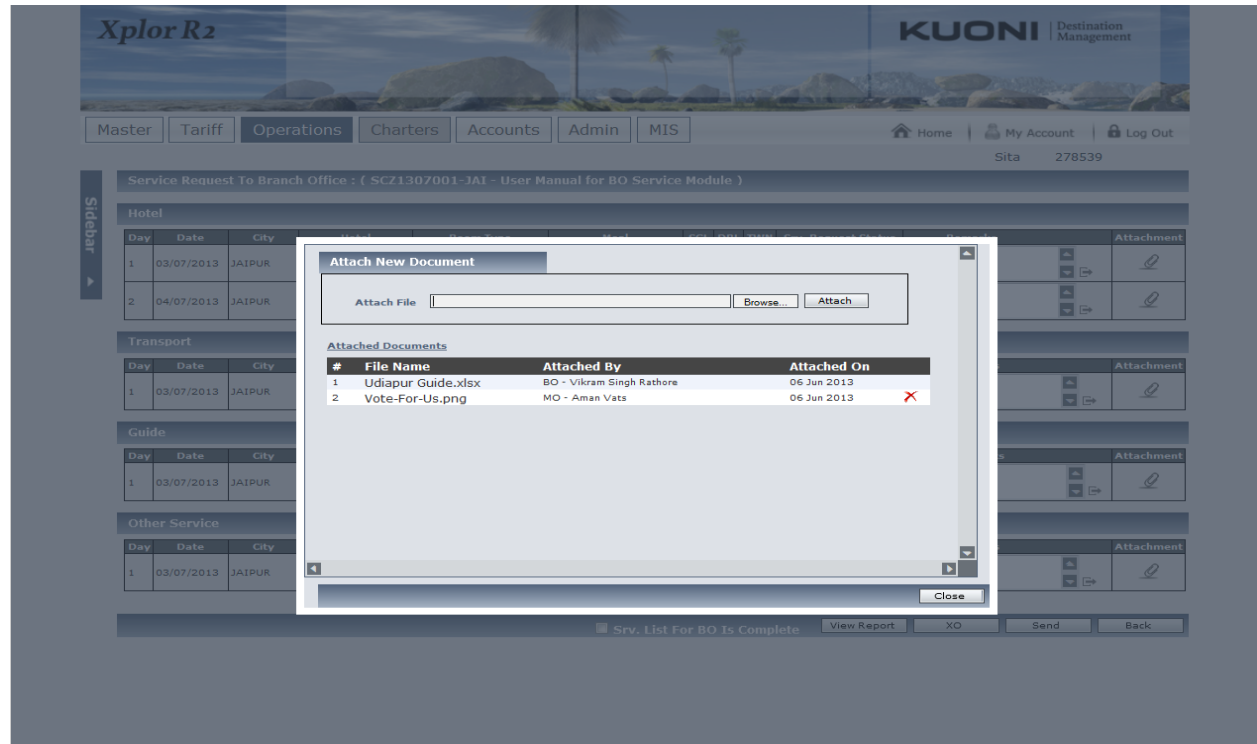
**Other Service**

Day	Date	City	Vendor	Services	Minor	Adult	Srv. Request Status	Remarks	Attachment
1	03/07/2013	JAIPUR	Services Guide - Jaipur	AMBER FORT	0	1	BO To Book		

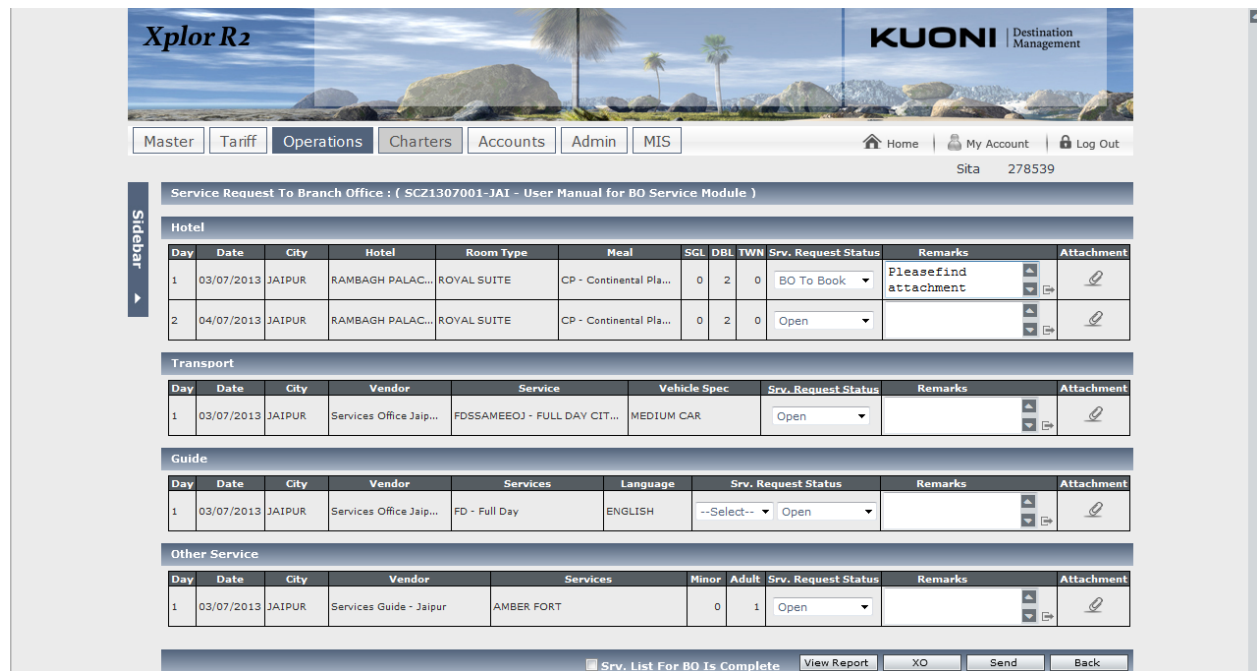
View Report | XO | Send | Back

Green Image

Now open the attachment screen now to see the new attachment,



Once User has opened the attachment screen and closed it, if the Attachment Image was green it will change to Grey as shown for above case,



## 5 Appendix

### Service Module Work Flow

