

What's New in PowerSuite?

PowerSuite New Functions Highlights – March 2023

1. **Enhanced Customer Contact Capture in the Booking Folder** – We enhanced PowerSuite to capture the “Passenger” contact in the personal profile and capture it in the Booking Folder for Retail booking type.

Personal profile> Passenger Contact

Contact 1			
Surname	_____		
Given Name	_____		
Title	_____		
Office Tel.	_____	Ext.	_____
Home Tel.	_____		
Mobile	_____		
Fax	_____		
Job Title	_____	Role	_____
Email	_____		

Passenger			
Surname	CLARK		
Given Name	STELLA ROSE		
Title	MS		
Office Tel.	22 000 000 000	Ext.	_____
Home Tel.	22 000 000 002		
Mobile	9093 9899		
Fax	_____		
Job Title	_____	Role	_____
Email	stella.r.clark@gmail.com		

Booking Folder Contact

Order - S0000002215 (jancy) - MS STELLA CLARK - Quoted

Priority Remarks

Order Type	Booking Order	Destination	_____	Trip Date	_____
Booking Type	Retail	Customer No.	RETAIL0061	Name	MS STELLA CLARK
Sales ID	john/John	Your Ref.	_____	Our Ref.	_____
Campaign	_____				

Contact

Name	CLARK	STELLA ROSE	MS	Email	stella.r.clark@gmail.com	Tel.	22 000 000 00	Address	...
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For corporate booking, with which company is the debtor, we keep the current logic to capture contact 1 of the personal profile in the booking folder contact.

What's New in PowerSuite?

2. **Indication of VIP of the Customer in the Booking Folder** – You can now indicate the VIP customer in the personal profile. The Booking Folder and Customer Profile Search will show the VIP indicator.

Set up VIP in the Personal Profile

Personal Profile - RETAIL0061(MS STELLA CLARK)

Cust. No.	RETAIL	0061	Company	.	Active	Dependent	
Surname	CLARK		Given Name	STELLA	MS	F	ADT/MS
Middle Name	ROSE		Team ID	SYS/	Sales ID	john/John	<input checked="" type="checkbox"/> VIP

VIP indicator in Customer Profile Search

Search Options - Add -

Type: All | Status: Active | Team ID: All | Sales ID: All

90939899 Search Reset

Show 15 entries Filter Excel

Customer No.	Customer Name	Company Name	Mobile	Email	Type	Status	Team ID	Sales ID
1	RETAIL0061 CLARK/STELLA MS ★	.	9093 9899	stella.r.clark@gmail.com	Personal	Active	SYS	john

Showing 1 to 1 of 1 entries FIRST PREVIOUS 1 NEXT LAST

VIP indicator in the Booking Folder > Pax section

Pax

PTC	Passenger Name	Lead Pax
1	ADT CLARK/STELLA MS ★	<input type="checkbox"/> \$ 👤

What's New in PowerSuite?

- Enhanced Copy Service Item in Booking Folder with Pax Selection** – You can now select the single or multiple pax when copying service item (s) to create a new or existing booking folder.

Select the pax (either single or multiple) in the copy service screen

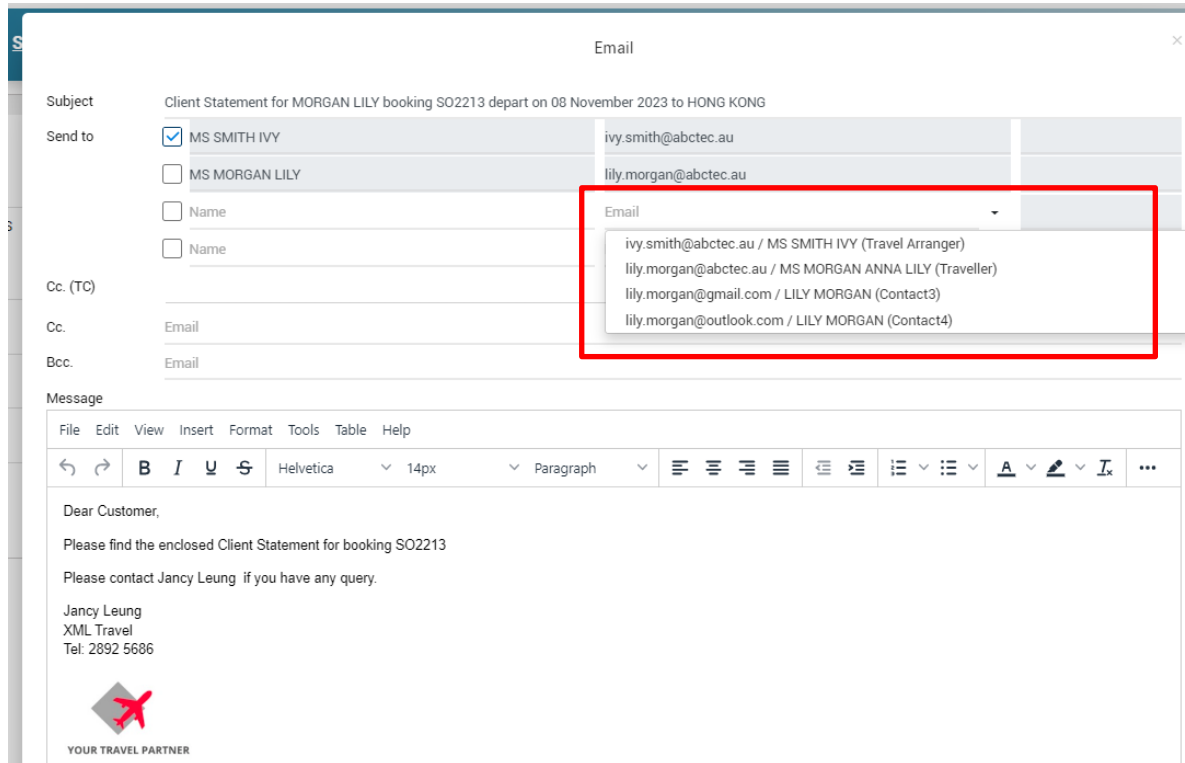
Destination SYD Trio Date 08NC
Customer I
Your Ref. Add to Order X
● Create New Order
Order Type Booking Order
Booking Type Retail
Customer No. RETAIL0042
Customer Name JOHNSON STEVE
○ Existing Order
Select Pax Select All Unselect All
 1 CLARK/STELLA MS (ADT)
 2 JOHNSON/STEVE MR (ADT)
Proceed

- Add the "Delete" File Action in the Upload File of Booking Folder** – Sometimes, you may mistakenly upload the file to the wrong booking folder. We enhanced the upload folder function to add the "Delete" file option. You can keep the data integrity for file management.

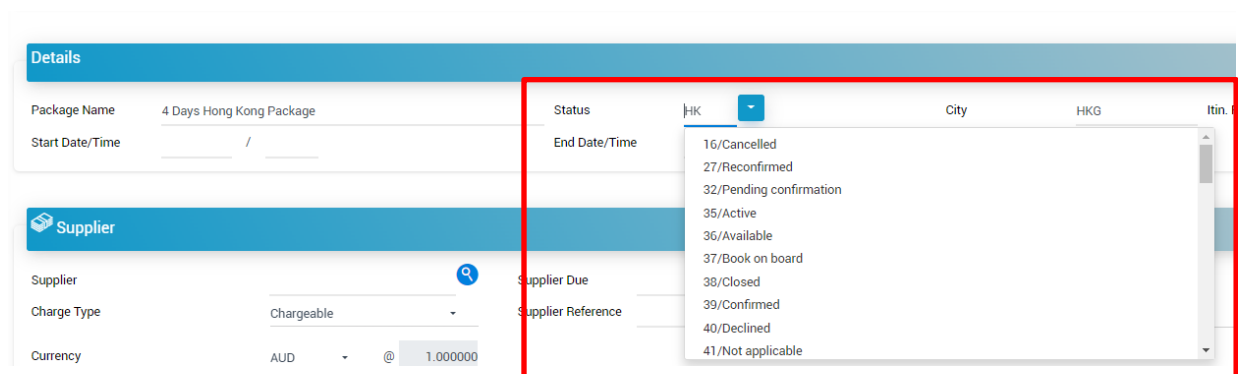
- ABC TECHNO S00000002212 - Upload & View Files X
Maximum file size 10 MB each. Multi-media files types are not allowed.
Input description here....
Browse
View Files
booking form
Booking Form.pdf
By: Jancy Leung
Date: 30MAR23 08:01
History

What's New in PowerSuite?

- Add the Email Contact Selection in the Email Document** – PowerSuite has been enhanced to retrieve the email address(es) from the customer profile for selection in the email document. You can now select the correct email address to deliver the client documents.



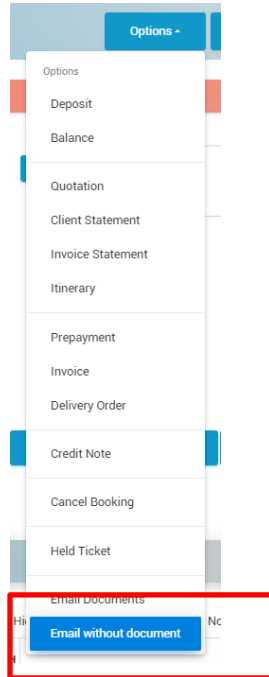
- Enhanced the Segment Status to have Drop-down List Selection** – You can select the service segment status in the drop-down list to align within the agents' operations.



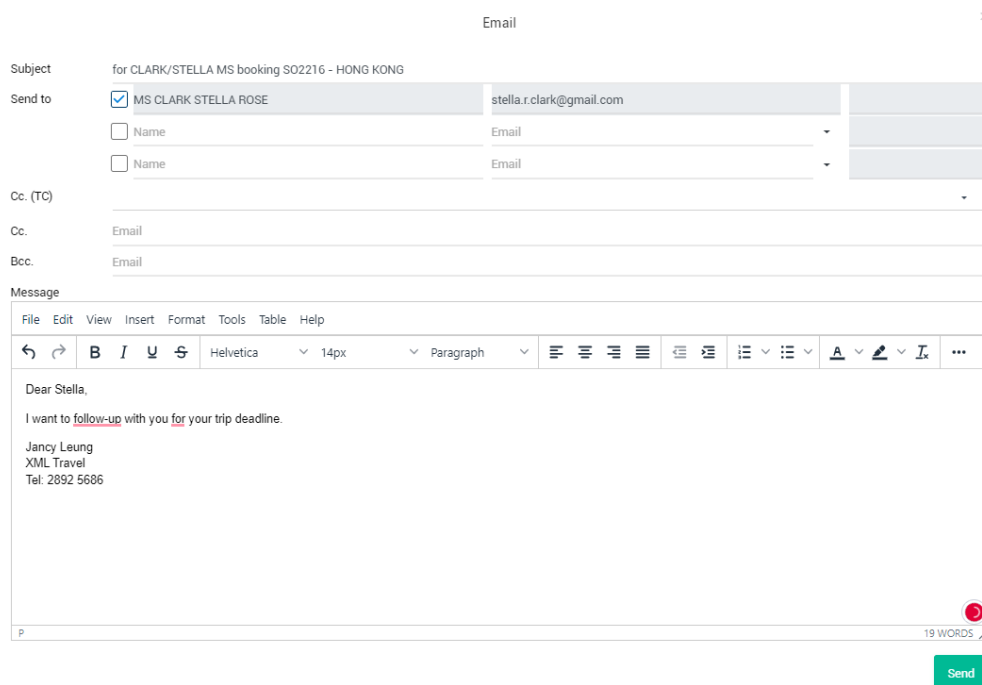
What's New in PowerSuite?

7. **Add the General Email Function in the Booking Folder** - You can send a general email to customers without client documents.

Go to the booking folder, select Options > Email without Documents



Input the email content and click "Send."

A screenshot of the email composition interface in PowerSuite. The subject is 'for CLARK/STELLA MS booking SO2216 - HONG KONG'. The recipient is 'MS CLARK STELLA ROSE' with email 'stella.r.clark@gmail.com'. The message body contains: 'Dear Stella, I want to follow-up with you for your trip deadline. Jancy Leung XML Travel Tel. 2892 5686'. A 'Send' button is visible at the bottom right.

What's New in PowerSuite?

The email will be kept in the Booking Folder > Document > History section with the "Email Only" indicator. You can click "Email" to review the email sent.

The screenshot shows the PowerSuite interface with the following elements:

- Navigation bar: Service, Pax, Itinerary, Document, Receipt/Payment, Trust, Booking History.
- Issue Document: Please select a document
- Filter: Show all, Invoice, Costing, Refund, Credit Note
- Table with columns: Type, Document No., Status, Dat
- Section: History
- Table with columns: Document Type, Document No., Print Date, Email Date, TCID
- Row 1: Email Only (highlighted with a red box), Document No., 30MAR23 16:56:14, 30MAR23 16:56:14, jancy, Email

8. **Enhanced the Email Function in the Booking Folder with File Attachment** – Sometimes, you may need to send the documents to customers not generated in PowerSuite.

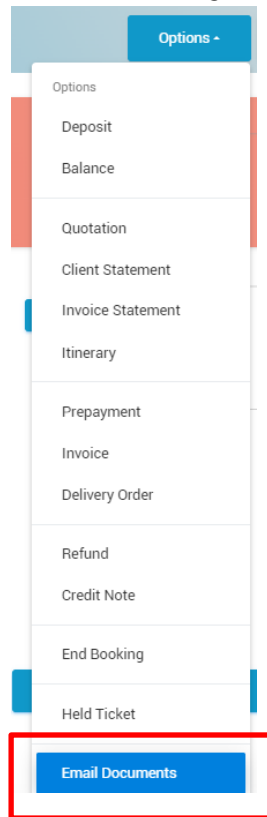
First, you need to upload the files in Booking Folder > Upload Files

The screenshot shows the 'Upload & View Files' dialog box with the following details:

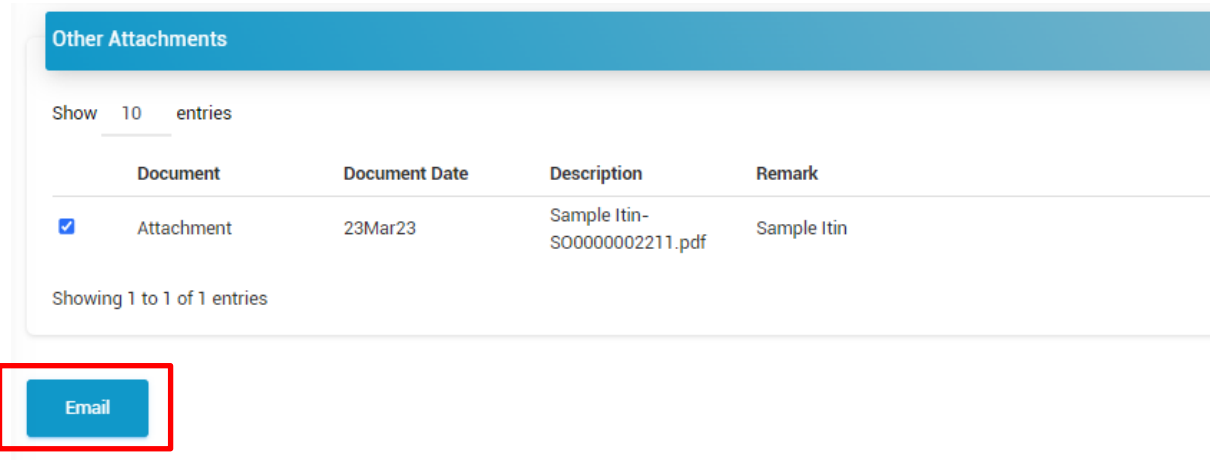
- Title: SO0000002211 - Upload & View Files
- Message: Maximum file size 10 MB each. Multi-media files types are not allowed.
- Input field: Input description here....
- Button: Browse
- Section: View Files
- File list: Sample Itin, SO0000002211.pdf
- Metadata: By: Jancy Leung, Date: 23MAR23 10:39
- History link: ^ History

What's New in PowerSuite?

Go to the booking folder, select Options > EmailDocuments



Select the Other Attachments and click "Email."



What's New in PowerSuite?

Review the email content and click "Send".

Email ×

Subject Please see attached documents for SO2211

Send to MS SMITH IVY ivy.smith@abctec.au
 MS MORGAN LILY lily.morgan@abctec.au
 Name Email
 Name Email
Company Profile MS WONG MARY marywong@abctec.au

Cc. (TC) _____
Cc. Email _____
Bcc. Email _____

Message

File Edit View Insert Format Tools Table Help

↶ ↷ **B** *I* U Helvetica 14px Paragraph

Dear MS LILY MORGAN,
Please refer to the attached documents for your trip depart on 22 March 2023.
Best regards,
Jancy Leung

YOUR TRAVEL PARTNER

P 22 WORDS

Attachment	Document	Document No.	Status
Attachment		SO000002211.pdf	Download

Send

The email will be kept in the Booking Folder > Document > History section with the "Other Attachments" indicator. You can click "Email" to review the email sent.

History

Document Type	Document No.	Print Date	Email Date	TCID	
Other Attachments		30MAR23 17:10:16	30MAR23 17:10:16	jancy	Download Email

What's New in PowerSuite?

9. **Enhanced the Booking Folder Summary with Credit Card Fee** – To reflect the booking P&L amount, PowerSuite has been enhanced to show the merchant fee in the Booking Summary.

Description / Itinerary	PNR	Status	Passenger / Ticket/Voucher No.	Supplier / Reference	Qty	Total Sales	Total Invoiced	Total Cost	Total Payment
1 International Package - 50 4 Days Hong Kong Package Date/Time: 17MAY23 - 20MAY23		HK	CLARK/STELLA MS	B00011	1 AUD	1,330.00	0.00	AUD 1,280.00	0.00
2 Credit Card Charge (Credit Card Charge - CRCH) Credit Card Charge			CLARK/STELLA MS		1 AUD	39.90	0.00	AUD 0.00	0.00

Charge Type	Sales	Cost	GST	Commission	Yield %	Settled	Pending Refund	Debtor Balance
Chargeable	1,330.00	1,280.00	0.00	50.00	3.76 %	0.00	0.00	1,369.90
Pay Direct	0.00	0.00	0.00	0.00	0.00 %			
Total	1,330.00	1,280.00	0.00	50.00	3.76 %			
Merchant Fee	39.90	0.00	3.63	36.27	100.00 %			
Non-Chargeable	0.00	0.00	0.00					

10. **Options to Show "Void" Documents in the Booking Folder** – Users opt to show "Void" Documents or not in the Booking Folder > Document. It gives you easy access to the documents at your fingertips.

Issue Document : Please select a document

Filter: Show all Invoice Costing Refund Credit Note Show Void Document

Type	Document No.	Status	Date	Amount	Balance	Issue By	
1 Sales Invoice	INV000001531	Void	30MAR23	AUD 1,330.00	0.00	jancy	Email
2 Sales Invoice	INV000001532	Printed	30MAR23	AUD 1,330.00	1,330.00	jancy	Email Void Cancel

What's New in PowerSuite?

11. **Enhanced the Booking Folder Search with the Selection of "Cruise" Service** – You can now search the booking folder with a "Cruise" service that helps you respond faster to your customers.

Select "Cruise" in the Product drop-down list and click "Search."

The screenshot shows the 'Booking' search interface. The 'Product' dropdown menu is open, displaying a list of service categories: All, Air, Hotel, Package, Car Transfer, Car Rental, Train/Ferry, Cruise (highlighted with a red box and a checkmark), Insurance, and Visa. The search criteria are: Type of Date: Trip Date, From: 30MAR22, To: 30MAR25, Status: All, User: Group. A search button is visible at the bottom right of the search area.

The booking folder with the "Cruise" service will be retrieved.

The screenshot shows the search results for the 'Cruise' service. The table displays 6 entries with the following columns: TCID, Status, Order Date, Order No., Destination, Trip Date, Customer Name, Passenger Name, and Description. The status of the entries is 'Active' (green square). A legend below the table indicates the status colors: Quoted (pink), Active (green), Balanced (blue), Ended (purple), and Void (black). A 'Filter' button and an 'Excel' button are also visible.

	TCID	Status	Order Date	Order No.	Destination	Trip Date	Customer Name	Passenger Name	Description
1	jancy	Active	08NOV22	S00000002171		15SEP23	MR PETER CHUNG	CHUNG/PETER MR	
2	jancy	Active	08NOV22	S00000002170		15SEP23	MR PETER CHUNG	CHUNG/PETER MR	
3	jancy	Active	08NOV22	S00000002169		15SEP23	MR PETER CHUNG	CHUNG/PETER MR	
4	jancy	Active	08NOV22	S00000002168		15SEP23	MR PETER CHUNG	CHUNG/PETER MR	
5	jancy	Ended	08NOV22	S00000002167		15SEP23	MR PETER CHUNG	CHUNG/PETER MR	
6	jancy	Balanced	08NOV22	S00000002166		15SEP23	MR PETER CHUNG	CHUNG/PETER MR	

What's New in PowerSuite?

12. **Enhanced the Deadline Management** – PowerSuite has been enhanced to highlight those tasks that passed the deadline in Red.

TC Productivity Dashboard > Deadline

My Tasks

Details	Deadline
1 Call back Mr. Lee @ 98745998	22-Mar

Task Management Module > My Task

Outstanding Order Deadline Reminder My Task Pending PNR Automation

Date 22MAR23 To 30APR23 Unread, Read Add

Please input order no., customer name, pax name, ticket no. or PNR for searching Search Reset

Show 15 entries Filter

Due Date	Created By	Type	Subject	Message	Status	Doc. No.	Action
1 22MAR23	jancy	Task	Call back Mr. Lee @ 98745998		Unread		✓ 🗑️

Showing 1 to 1 of 1 entries FIRST PREVIOUS 1 NEXT LAST

What's New in PowerSuite?

13. Enhanced Customer Profile Setting for Invoicing – You can configure the Invoice option to use the Cost Centre name and Cost Center address

Go to the Company Profile > Billing > Cost Centre section. Select the Options.

Cost Centre

Status: Active Cost Center Code: Group: Search

Status: Active Inactive

Show 50 entries Search:

Status	Cost Centre Code	Description	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Address Line 5	Phone No.	Email	Group
<input checked="" type="checkbox"/>	FINANCE	Finance	FINANCE COST CENTRE ADDRESS 1	FINANCE COST CENTRE ADDRESS 2	FINANCE COST CENTRE ADDRESS 3					
<input checked="" type="checkbox"/>	MARKETING	Marketing	MARKETING COST CENTRE ADDRESS 1	MARKETING COST CENTRE ADDRESS 2	MARKETING COST CENTRE ADDRESS 3					
<input checked="" type="checkbox"/>	SALES	Sales	SALES COST CENTRE ADDRESS 1	SALES COST CENTRE ADDRESS 2	SALES COST CENTRE ADDRESS 3					

Showing 1 to 3 of 3 entries PREVIOUS 1 NEXT

Use Cost Centre address in Invoice

Show Cost Centre name In Invoice

PowerSuite uses the Cost Centre address/name during the Invoicing process.

Issue Invoice - SO0000002213 (jancy) - MORGAN LILY Proceed

Customer No. ABCTEC0008 Name MORGAN LILY CREDIT INFORMATION Bill Company ABC TECHNOLOGY LIMITED

Type Sales Invoice Split Use Cost Centre Address Cost Centre SALES

Select following services(s) to issue invoice. Click "Split" if you want to issue invoice by pax or partial service

<input checked="" type="checkbox"/>	Service	Description	Sales	Invoice Amount
1 <input checked="" type="checkbox"/>	International Hotel - 60	SHERATON HONG KONG(HKG) 1 X DELUXE SGL Date: 08NOV23 - 12NOV23	AUD 1,200.00	1,200.00 Part

Cancel Proceed

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Here is the Cost Centre Name & Address in Invoice.

1 of 1 Find | Next



XML TRAVEL PTY LTD

GROUND FLOOR, 182 CAPEL STREET, SYDNEY
Tel: +65 3256 9865 | Email: bookings@xmltrvl.com | ABN # 1266222133

YOUR TRAVEL PARTNER

TAX INVOICE - INV1533

To: Sales SALES COST CENTRE ADDRESS 1 SALES COST CENTRE ADDRESS 2 SALES COST CENTRE ADDRESS 3	Issue Date: 30-MAR-23 Customer No.: ABCTEC0008 Booking No.: SO2213 Due Date: 07-APR-23 Consultant: Jancy Leung Email: jancy@xmlhk.com Phone: 28308301 Departure Date: 08-NOV-23
Attn: MS IVY SMITH	

Please contact us if you have any questions

Thank you for your booking!

Booking References

Account No. ABN00001
Department SALES

Passenger(s)

1. MORGAN/LILY MS



What's New in PowerSuite?

- 14. Enhanced Customer Profile Setting for Upload Profile Name** – You can now set up the traveller names' sequence when you upload the name to Sabre Red 360 for PNR creation. It facilitates the user to select the appropriate traveller name to upload to Sabre Red 360 for booking.

Go to the System Table > Upload Reservation Name Order Maintenance. Select the display order.

Source	Display Order
Passport Name	1
Reservation Name	2
Reservation Name with Middle Name	3
Reservation Name of Contact 2	4

In the Upload tab, the traveller reservation name display will be shown in the drop-down according to the setting.

 **MORGAN/LILY MS**  Other Dependents

General

<input checked="" type="checkbox"/> Booking Name	MORGAN/LILY MS	Gender	F - Fema
<input checked="" type="checkbox"/> Office Tel.	MORGAN/LILY MS		
Job Title	MORGAN/LILY ANNA MS		
	MORGAN/ANNA LILY MS		

What's New in PowerSuite?

15. **Enhanced PowerSuite to Handle "Pay Gross" Scenario** – Sometimes, you may need to pay the supplier gross amount, and the supplier will pay you the commission later. For such a scenario, you can now select "Pay Gross" in the service item.

Tick the check box of "Pay Gross."

Supplier

Supplier: HTLCEN Supplier Due: 06SEP23
Charge Type: Chargeable Supplier Reference: HTLCEN080921
Currency: AUD @ 1.000000
Cost: 980.00
Commission: 14.705882 % 144.12 Pay gross
Tax: 0.00
Total Room Night(s): 4 FOC: 0
GST: 0.000000 % 0.00 GST Inclusive Amend
Total Cost (AUD): 835.88 Staff Commission: 0.00 TC ID: jancy/Jancy Leung

When you pay the supplier, you can pay the gross amount

Payment (jancy) Options - Proceed

Payment Date: 30MAR23 Type: Payment
Supplier No.: HTLCEN Name: HOTEL BOOKING CENTRE Payee Name: HOTEL BOOKING CENTRE

Document Add

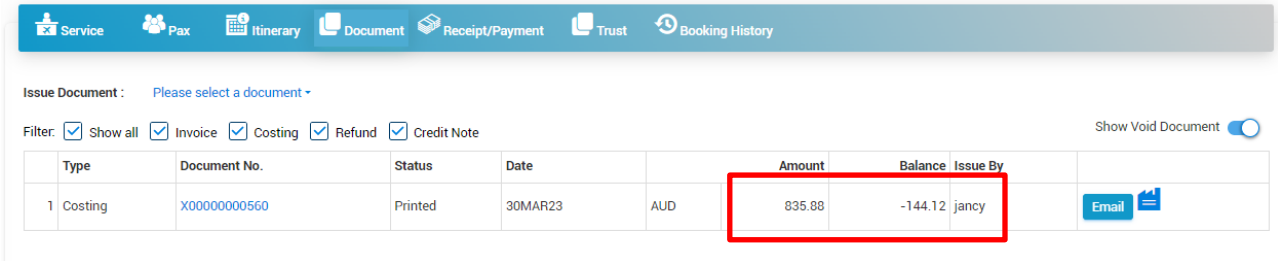
Doc. No.	Date	Reference	Supplier Inv.No./Ref.	Pax Name	Outstanding Amount	Pay Amount
1 S00000002219	30MAR23		HTLCEN080921	MORGAN/LILY MS	AUD 980.00	980.00
Total Amount					AUD 980.00	980.00

Form of Payment

Direct Deposit AUD 980.00 Trust/TRUST ACCOUN Account No. +

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Payment is made. PowerSuite will issue a costing document with the "-ve" amount to indicate the commission that the supplier should pay.

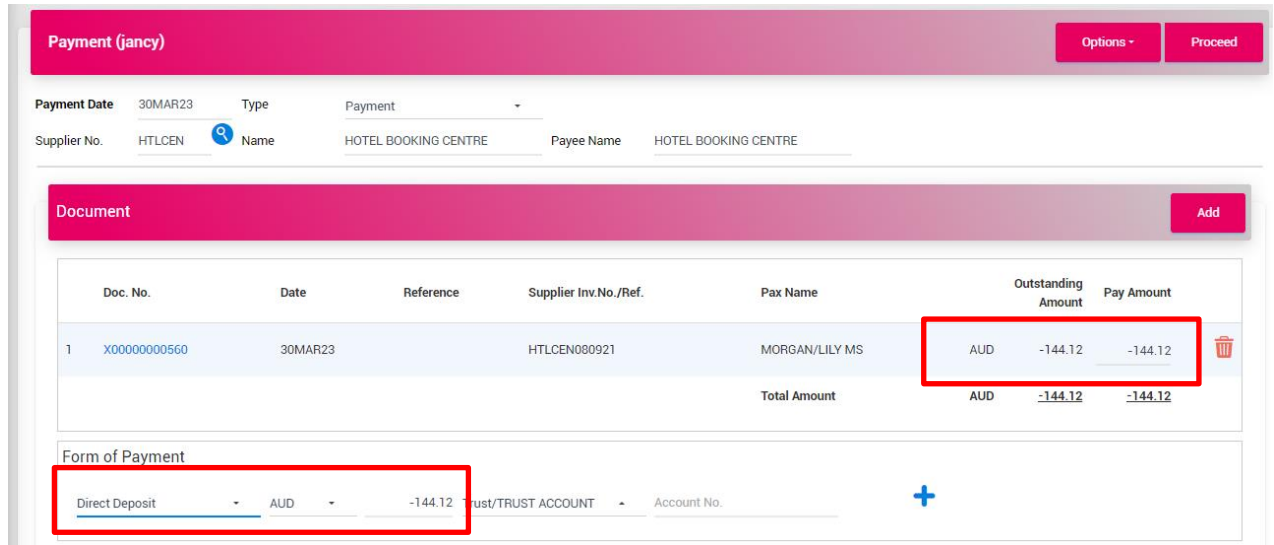


Issue Document : Please select a document -

Filter: Show all Invoice Costing Refund Credit Note Show Void Document

Type	Document No.	Status	Date		Amount	Balance	Issue By	
1 Costing	X00000000560	Printed	30MAR23	AUD	835.88	-144.12	jancy	Email

Upon you receive the commission from the supplier, you can go to the payment module and select the costing document. Pay the "-ve" amount to record the commission received.



Payment (jancy) Options - Proceed

Payment Date: 30MAR23 Type: Payment

Supplier No.: HTLCEN Name: HOTEL BOOKING CENTRE Payee Name: HOTEL BOOKING CENTRE

Document Add

Doc. No.	Date	Reference	Supplier Inv.No./Ref.	Pax Name	Outstanding Amount	Pay Amount	
1 X00000000560	30MAR23		HTLCEN080921	MORGAN/LILY MS	AUD -144.12	-144.12	
Total Amount					AUD -144.12	-144.12	

Form of Payment

Direct Deposit - AUD -144.12 Trust/TRUST ACCOUNT - Account No. +

What's New in PowerSuite?

16. **Selection to Merge Selected Documents in PDF File** – In the “Batch Processing Document”, you can merge selected documents in the PDF file.

The screenshot shows the 'Selected Document' interface. It features a table with columns: Date, Document No., Order No., Customer Name, Customer No., Cost Centre, Amount, Status, and TCID. Three entries are listed, all for 'ABC TECHNOLOGY LIMITED'. Below the table, there are two checkboxes: 'Merge files by billing customer no.' (unchecked) and 'Merge all documents in 1 file' (checked, highlighted with a red box). To the right of these checkboxes are 'PDF' and 'Email' buttons.

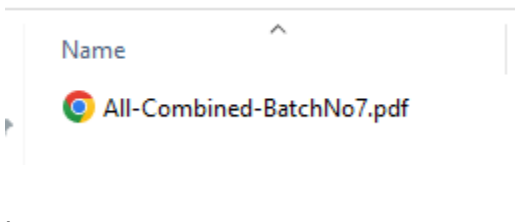
Date	Document No.	Order No.	Customer Name	Customer No.	Cost Centre	Amount	Status	TCID
30MAR23	INV000001533	SO0000002213	ABC TECHNOLOGY LIMITED	ABCTEC	SALES	1,200.00	Processing	jancy
23MAR23	INV000001529	SO0000002212	ABC TECHNOLOGY LIMITED	ABCTEC	SALES	1,200.00	Completed	jancy
20MAR23	INV000001528	SO0000002211	ABC TECHNOLOGY LIMITED	ABCTEC	SALES	4,550.00	Processing	jancy

You can download the documents in Job History.

The screenshot shows the 'Batch Processing Document Job History' interface. It includes search filters for 'Create Date' (30MAR23 to 31MAR23), 'Status' (All), and 'User Group'. Below the filters is a search bar with a 'Search' button and a 'Reset' button. A legend indicates status colors: Pending (purple), Processing (green), Completed (blue), and Fail (black). The main table has columns: Create Date, Created By, Batch No., Status, Complete Date, and Remark. One entry is shown with a 'Download' button highlighted by a red box.

Create Date	Created By	Batch No.	Status	Complete Date	Remark
30MAR23 06:42 PM	jancy	7	Completed	30MAR23 06:44 PM	

The selected documents will be merged into a PDF file



Please get in touch with anzsupport@xmlhk.com if you have any questions.