FRANCHISE OPERATIONS MANUAL

Franchise Operations – Standard Operating Procedure	
02. RMS Enterprise – Travel Agent Setup	SET - 002

Overview

At the time of creating or updating a reservation, it is an imperative task to collect the travel agent information, where relevant. When collecting the travel agent information, if the travel agent is not pre-existing in the property managements system, the setup of the travel agent is required. This needs to be completed in the Property Management System (PMS).
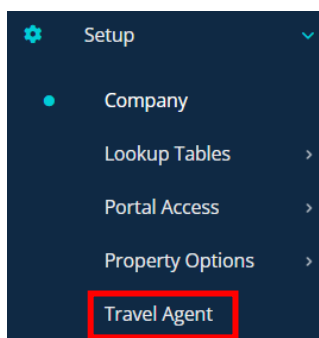
Standard

Ensuring all properties, and respective employees, are adhering to the expected guidelines to maintain data integrity throughout the network, whilst performing operational duties.
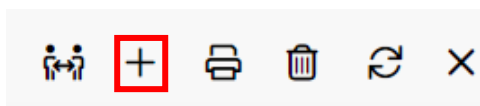
Procedure

Within the travel agent setup function in the Property Management System, creating a new travel agent requires the following process to be completed accurately:

→   Select **'Setup'**

→   Select **'Travel Agent'**

→   Select '**Add'**

Franchise Operations – Standard Operating Procedure	
02. RMS Enterprise – Travel Agent Setup	SET - 002

    → Select **'Type'**

    → Enter full Travel Agent name in **'Travel Agent'**

    → Enter the '**Address'** of the Travel Agent location

    → Enter the **'City'**

    → Enter the **'State'**

    → Enter the **'Postcode'**

    → Enter the **'Country'**

    → Trading As

    → Enter **'Phone'** of the Travel Agency with country code

    → Enter **'E-Mail'** of the Travel Agency

    → Enter the **'IATA Number'** of the Travel Agency

→ Enter relevant contact and details in 'Notes' that will be property specific.

→ Select **'Save/Exit'**

Note: When creating the Travel Agent name, it is imperative that the following naming convention guidelines are followed:

    → Capitalize all nouns

    → Capitalize all abbreviations

    → Travel Agents specific to a location will need to be enclosed e.g.: Corporate Traveller (NSW112)

E.g. **FCM Travel Solutions** not fcmtravel **Corporate Travel Management (NSW 112)** not ctm nsw 122

Note: Prior to creating a Travel Agent setup you will need to validate the IATA number to ensure the Travel Agent is licensed.

Version Control

Version	Issue Date	Developer	Approval	SLT Meeting Review
02	2 August 2023	Business Transitions	Sarah Begbie	

Policy No   SET -002
Policy Name   RMS Operations Module
Area of Operation   Property Management System
Issue Date 06 April 2020
Version   01

Page 2 of 2