

Title	Use a travel management system to manage client files and process travel arrangements for clients		
Level	4	Credits	4

Purpose	People credited with this unit standard are able to: create client profiles in a travel management system; use a travel management system in conjunction with a computer reservation system to create passenger name records (PNRs) and manage travel arrangements for clients; amend and cancel segments in a travel management system; and invoice clients, process payments, and request or issue documentation using a travel management system.
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Classification	Tourism > Travel
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Available grade	Achieved
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Guidance Information

1 Definitions

Client booking profiles for the purpose of this unit standard are for recording travel and non-travel information (including financial transactions) relating to a customer's travel arrangements.

Client profiles for the purpose of this unit standard are for recording information that directly relates to a customer, which assists the travel agent when making travel arrangements for that customer.

Computer reservation system refers to any computer system used in the travel industry to make reservations. For example – a global distribution system (GDS), an airline website, a wholesale travel system (Calypso).

Costings refer to the financial information for each segment within a client booking profile and may include but is not limited to – gross and net amounts, taxes, GST, commission.

Mandatory fields refer to those fields within the travel management system which must be completed as specified by the supplier of the travel management system or travel industry workplace policies and procedures.

Suppliers, in the context of this unit standard, may include wholesalers or direct suppliers.

Travel industry workplace policies and procedures refer to documented instructions about workplace expectations. These may include but are not limited to – customer service delivery, personal presentation, legislation, organisational structure, business objectives.

Travel management system refers to any computer system used in the travel industry capable of managing client, booking, and financial details, and interfacing with a computer reservation system. Examples of travel management systems may include

but are not limited to – Sabre Agency Manager (SAM), CrossCheck Travel (CCT), Tramada.

- 2 Competency in this unit standard must be demonstrated using a travel management system in conjunction with a computer reservation system. A theoretical knowledge of the travel management system is not sufficient to gain competency.
- 3 Any relevant Acts, regulations, and bylaws must be complied with during assessment against this standard. Legislation relevant to this unit standard may include but is not limited to – Commerce Act 1986, Consumer Guarantees Act 1993, Contract and Commercial Law Act 2017, Employment Relations Act 2000, Fair Trading Act 1986, Health and Safety at Work Act 2015, Human Rights Act 1993, Privacy Act 1993.
- 4 All assessment tasks for performance criteria are to be carried out in accordance with travel industry workplace policies and procedures.

Outcomes and performance criteria

Outcome 1

Create client profiles in a travel management system.

Range three client profiles.

Performance criteria

1.1 Client profiles are created in a travel management system.

Range information may include but is not limited to – name, date of birth, personal contact details, company, company contact details, passport or visa details, special requests, airline/hotel/rental car preferences, frequent traveller or loyalty programme memberships;
evidence relating to all mandatory fields is required.

Outcome 2

Use a travel management system in conjunction with a computer reservation system to create passenger name records (PNRs) and manage travel arrangements for clients.

Range evidence is required for three different bookings;
at least one booking must include an adult, and a child or infant.

Performance criteria

2.1 Client information from the travel management system is uploaded to the computer reservation system to create the PNR.

2.2 PNR is downloaded from the computer reservation system to the client booking profile in the travel management system.

2.3 Travel or non-travel segments related to client travel arrangements are manually loaded into the client booking profile in the travel management system.

Range may include but is not limited to – flights, accommodation, travel insurance, foreign exchange, departure tax, service fees, amendment fees; evidence is required for two different segments.

2.4 Costings are loaded, checked or amended in the client booking profile.

2.5 Profit margin in the client booking profile is checked and amended as required.

Outcome 3

Amend and cancel segments in a travel management system.

Performance criteria

3.1 Travel or non-travel segments in the client booking profile are amended in accordance with client requirements.

Range evidence is required for two different amendments.

3.2 Costings in the client booking profile are amended.

Range evidence is required for two different amendments.

3.3 Travel or non-travel segments in the client booking profile are cancelled in accordance with client requirements.

Outcome 4

Invoice clients, process payments, and request or issue documentation using a travel management system.

Performance criteria

4.1 Confirmation itinerary and invoice are prepared for the client.

4.2 Client payments or supplier payments are processed.

4.3 Documentation is requested or issued in accordance with supplier requirements.

Planned review date	31 December 2025
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	20 February 2009	31 December 2018
Review	2	16 February 2017	31 December 2022
Review	3	26 November 2020	N/A

Consent and Moderation Requirements (CMR) reference

0112

This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Comments on this unit standard

Please contact ServicelQ qualifications@ServicelQ.org.nz if you wish to suggest changes to the content of this unit standard.