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4-TA Office Administrative3_Forms-Worksheets (Groups) Product ID TA-1000AF

The following forms are contained within this package. Once downloaded these forms, document and worksheets can be used as masters, branded then copied to your desktop each time you want to use them.

1-Form 1002AF©2017- Group Trip Questionnaire (client) (office use) (static)

◆This questionnaire form is used for groups with questions to ask the group leader. It can be modified to suit your needs. This form uses very basic open and closed end questions.

2-Form 1003AF©2017- Cruise Group Ship Quote (client) (static)

◆This worksheet is used to work on group cruises to gather all the information needed for cabin quotes for group. Then can add information to the quote worksheet to give clients for their proposed cruise. You can convert this form to a pdf after filling out for client. Mostly used to Compare the price of two different Cruises or Cruise Lines if necessary.

3-Form 1004AF©2017- Group Form - Tour Operator (office use) (static)

◆This form was originally designed to give to Tour Operators. Now it is used as trip information and to keep track of the group. I get the answers from the group questionnaires to fill this out.

4-Form 1005AF©2017- Group PAX List for Client (pdf-static)

◆This spreadsheet is for gathering the contact/travel information for the group members. I give this to the group leader to fill out and return to me so I have a list and she/he has a list. Has people are added the list is updated.

5-Form 1006AF©2017- Tour Passengers Accommodations List (office use) (static)

◆This form is for keeping track of the tour group travelers sharing rooms. It has basic contact information for Primary passenger in each room. A copy of this list can be given to the tour operator if needed.

6-Form 1007AF©2017- Group PAX Flight List (office use) (static)

◆This form helps keep track of the flight information for each passenger in a group. It saves time from sorting through the paper work of the individual confirmations because some passengers may be on different flights. Detailed passenger info for your group is on this sheet. *(For office use only).*

7- Form 1009AF©2017- Rental Homes-Villas Quotes (client) (static)

◆This form is for a quick comparison between rental properties (Homes, Villas, Castles, etc.). It gives clients a few choices for rentals. I usually send three to four properties for them to look at and make a decision.

8- Form 1010AF©2017-Group Form for Cruise Line (office use) (static)

◆This form is for office use when planning a group cruise. All the useful information you will need to know about your group is on one sheet. This form is similar to the one used for Tour Operators/Groups.

BONUS FORM (Complimentary)

Letter: Why We Recommend Travel Insurance (client) (static)

◆This one page document is an explanation for clients as to why we recommend travel insurance, the benefits and risks. I created this to send out with the quotes and insurance brochures or if a client was on the fence about buying it. It helps a lot!