



pinSIGHT 2.0 Integration with AgentMate

Step 1: To get started **Click** on the Utilities Tab and **Select** Counselor Privileges from the menu.

The screenshot shows the AgentMate dashboard with the 'Utilities' tab selected in the top navigation bar. A red arrow labeled '1' points to the 'Utilities' tab. Another red arrow labeled '2' points to the 'Counselor Privileges' option in the dropdown menu. The dashboard also displays 'Latest News', 'Current Leads', and 'Marketing News' sections.

Step 2: Next **Select** the Counselor from the list. Then in the Modules Section **Click** on Pro Suite. This will populate pinSIGHT 2.0 in the Permissions section for you to **Select**. Then **Click Save**.

The screenshot shows the 'Counselor Privileges' configuration screen. A table lists counselors with columns for Name, Role, and Active status. A red arrow labeled '1' points to the 'DEMO-THERESA' row. Another red arrow labeled '2' points to the 'Pro Suite' module in the 'Modules' section. A third red arrow labeled '3' points to the 'pinSIGHT 2.0' option in the 'Permissions' section. The 'Active Counselors Only' checkbox is checked.

Step 3: **Click** on the Integrations tab to continue

The screenshot shows the 'Counselor Privileges' configuration screen with the 'Integrations' tab selected. The 'pinSIGHT 2.0' option is highlighted in the 'Permissions' section. The 'Active Counselors Only' checkbox is checked.

Step 4: Scroll all the way down to the bottom of the page, and enter the pinSIGHT Username into the “pinSIGHT Username” field.

Click Save

You are now ready to make bookings!

▼ Links

☒ All ☐ Corporate Program ☐ Vendor ☐ Agency ☐ Insurance

Type	Display Name	User Name	Password
Corporate Program			
Agency	Webmail Link		
Agency	Carnival		
Vendor	CruisingPower		
Vendor	AMA TA Section		
Vendor	GoCCL		
Vendor	HAL TA Center		
Vendor	NCL Travel Partners		
Vendor	Oceania TA Center		
Vendor	Princess OneSource		

User Name

Password

PinSight Username

theresa@nomail.com

1

2

Step 5: Adding a pinSIGHT Hotel to a completed AgentMate Reservation.

Click on the Res Pricing Tab.

Dashboard Client Reservations Pro Suite Inventory Accounting Utilities Reports Links

Reservation Maintenance \ Information Branch Main Office Res # 1765074

Res. Info Client Info Booking **Res. Pricing** Invoice Transactions Adjustments Cancel

Guest List Theresa Scurry Lynda Fish

Status Booked Counselor Barb Chamberlain Activity Regal Princess Occupied Category GG Purchased Category GG Sync Cats

Booked Date 02 Aug 2017 Departure Date 05 Nov 2017 Return Date 12 Nov 2017 Group Cabin # Guarantee

Itinerary Name 7 day Caribbean from Fort Lauderdale, Florida Duration 7 days Destination Caribbean Detail

Pricing Summary Pricing Detail Attachments Vendor Info Counselor Comms

Vendor	Curr.	Price	Cost	Comm.	Profit	Taxes	C. Paid	C. Bal.	V. Paid	V. Bal.	Yield
Summary	USD	\$4,239.04	\$3,732.78	\$506.26	\$506.26	\$776.39	\$1,313.74	\$2,925.30	\$1,313.74	\$2,419.04	11.94%
Princess Cruises	USD	\$3,925.30	\$3,445.30	\$480.00	\$480.00	\$725.30			\$1,000.00	\$2,445.30	12.22%

Edit Accounts

Notes Cross References Guest Dates Single Payor

Date Time Description

Reminders

Date	Activity	Status
24 Aug 2017	Client final payment	Open
06 Sep 2017	Vendor final payment - Princess Cruises (Cru...	Open
05 Nov 2017	Add Gift To Booking	Open

Edit

Step 6: In the PRO-Suite box **Click** on the Hotel link.

Demo and Training Welcome Theresa Scurry DEMO Sign Out Help AGENTMATE

Dashboard Client Reservations Pro Suite Inventory Accounting Utilities Reports Links

Reservation Maintenance \ Pricing Res # 1765139

Res. Info Client Info Booking **Res. Pricing** Invoice Transactions Adjustments Cancel

Item

Cruise - Royal Caribbean International (*)

Type Cruise Currency USD Primary (*)

Vendor Royal Caribbean International New

Confirm. # 13454894 Booking Method/Agent

Remove Select Add New

Departure Date 29 Oct 2017 Return Date 05 Nov 2017 Fare Code

Invoice Description 7 day Caribbean from Fort Lauderdale, Florida

Comments

PROSuite Quick Add

Hotel

Step 7: A Pop-up box displays. **Enter** in your destination and **Select** it from the pre-populated options.

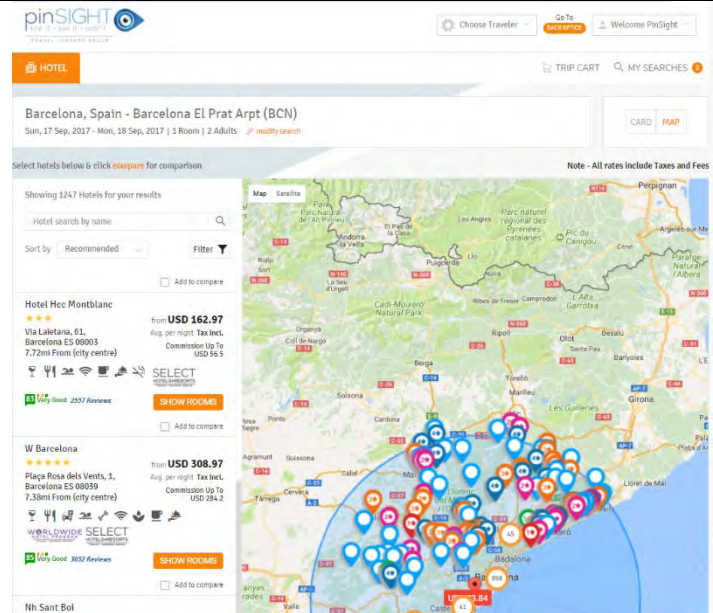
Click Search

Note: The Check-In date will default to 1 day prior to the previously entered departure date, with the Check-Out scheduled for the previously entered departure date. You can adjust this if need be.



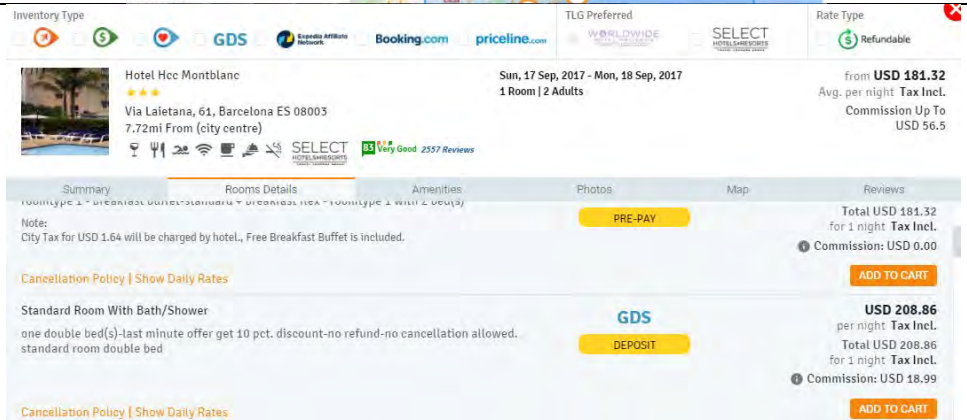
The image shows a mobile application interface for pinSIGHT. At the top, the logo reads "pinSIGHT see it • edit it • profit it". Below the logo, a red text prompt says "Please search and select for a destination". Under the heading "Destination", there is a text input field containing "Barcelona, CT, Spain". Below this, there are "Check In" and "Check Out" date pickers. The "Check In" date is set to "09/17/2017" and the "Check Out" date is set to "09/18/2017". Below the dates is a table with columns: "Select", "Full Name", "Is Primary", and "Age". There are two rows of data: the first row has a checked "Select" box, the name "Theresa Scurry", a checked "Is Primary" box, and the age "31"; the second row has a checked "Select" box, the name "Sharon Scurry", an unchecked "Is Primary" box, and the age "60". At the bottom right of the form is a "Search" button. There is also a small "X" icon in the bottom right corner.

Step 8: The pinSIGHT search populates in a new window, where you can narrow down your options.



The image shows a web browser interface for the pinSIGHT search results. The header includes the pinSIGHT logo and navigation links like "Choose Traveler", "Go To", and "Welcome PinSIGHT". Below the header, there is a section for "HOTEL" search results. The search criteria are "Barcelona, Spain - Barcelona El Prat Arpt (BCN)" for "Sun, 17 Sep, 2017 - Mon, 18 Sep, 2017 | 1 Room | 2 Adults". The results show a list of hotels on the left and a map on the right. The first hotel listed is "Hotel Hcc Montblanc" with a rating of 4.5 stars, located at "Via Laletana, 61, Barcelona ES 08003", 7.72mi from city centre, with a price of "from USD 162.97". The second hotel is "W Barcelona" with a rating of 4.5 stars, located at "Plaça Rosa dels Vents, 1, Barcelona ES 08039", 7.38mi from city centre, with a price of "from USD 308.97". The map on the right shows the location of these hotels in Barcelona, with many other hotels marked with colored pins.

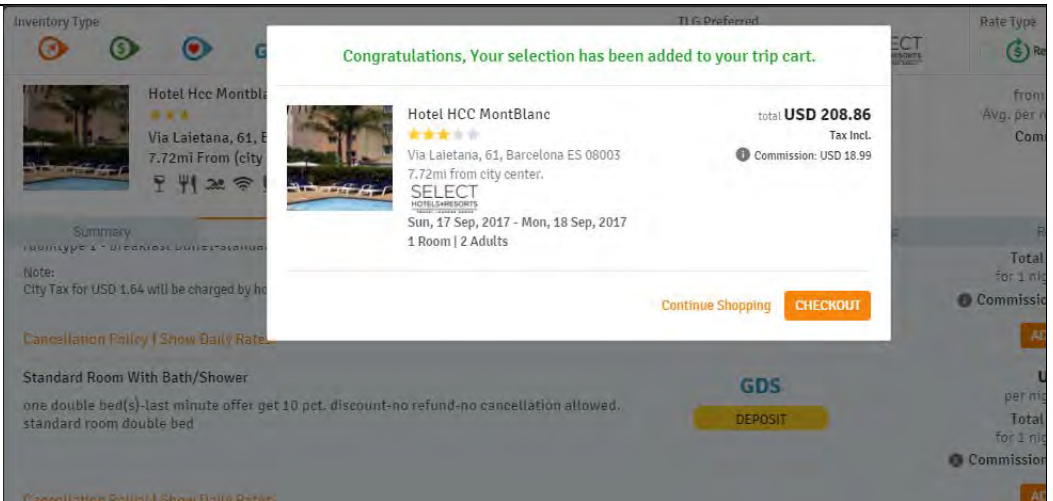
Step 9: After selecting a hotel and clicking “Show Rooms”, you can see which rooms are available. Then select and add one to your cart.



The image shows a detailed view of a hotel room selection. The header includes the pinSIGHT logo and navigation links. The search criteria are "Hotel Hcc Montblanc" for "Sun, 17 Sep, 2017 - Mon, 18 Sep, 2017 | 1 Room | 2 Adults". The room details section shows a "Standard Room With Bath/Shower" with a price of "USD 208.86 per night". The room is described as "one double bed(s)-last minute offer get 10 pct. discount-no refund-no cancellation allowed. standard room double bed". The room is available for "PRE-PAY" and "GDS DEPOSIT". The room is also available for "ADD TO CART". The room is also available for "ADD TO CART". The room is also available for "ADD TO CART".

Step 10: A Pop-up box displays.

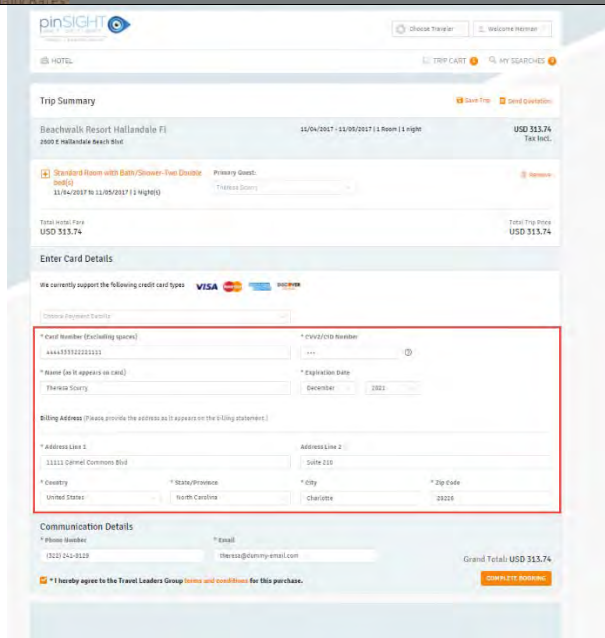
pinSIGHT adds your room to your cart to checkout or continue shopping.



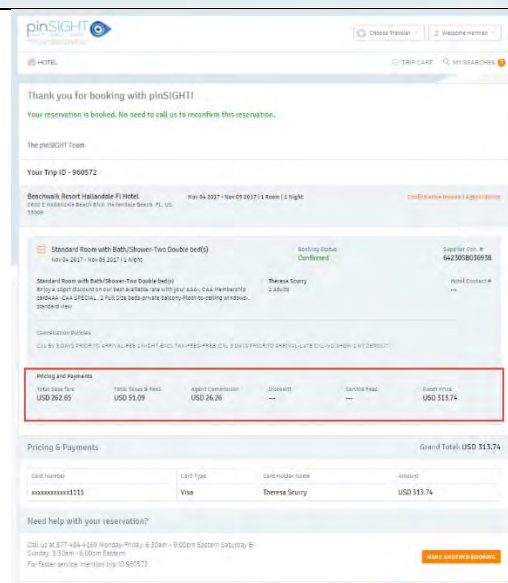
Step 11: *Fill* in the required info to complete the booking.

Then **Choose** payment details dropdown should populate credit cards that exist in that client's profile in AgentMate. You will still need to enter the CVV number manually.

Then **Click** Complete Booking in bottom right.



Step 12: You'll get the **Completed** pinSIGHT reservation.



Step 13: Next go back to AgentMate and **Click** on the Res Pricing Tab to refresh the page.

Step 14: The pinSIGHT Hotel line item appears **Click** on Hotel – pinSIGHT 2.0 to display the details.

Please note: To have the commission auto-populate in the AgentMate Hotel line item, the Store Defaults Commission for pinSIGHT needs to be set for 10% which can be set up under *Utilities > Vendor Setup*. This can be overwritten at any time at the reservation level.

Item	Lynda Field				
Brochure price		\$0.00			
Vendor price		\$139.30			
Agency price		\$139.30			
Markup / Discount		\$0.00			
Commission %		10.00%			
Cost		\$125.37			
Commission \$		\$13.93			
Profit		\$13.93			
Hotel tax		\$43.06			

To do this **Click** the Receive Payment from Client icon in the bottom left corner.

Hotel Name: B Ocean Resort Check-In Date: 28 Oct 2017 Check-Out Date: 29 Oct 2017 Accommodation Type: Room FDN

Hotel Contact Info: 1-954-5245551

Item	✓ Lynda Fish	✗ Lynda Fish				
Brochure price	\$0.00					
Vendor price	\$139.30					
Agency price	\$139.30					
Markup / Discount	\$0.00					
Commission %	10.00%					
Cost	\$125.37					
Commission \$	\$13.93					
Profit	\$13.93					
Hotel tax	\$43.06					
Gov't fees & taxes	\$0.00					
Other commission	\$0.00					
Hotel List						
Gateway City						
Room Number						

☐ Collect at time of deposit

Deposit: \$0.00

Note: Click on the Lookup/Add Button to enter in new credit card or look up an existing one.

Demo and Training

Welcome Theresa Scurry-DEMO | Sign Out

Help

Dashboard
Client
Reservations
Pro Suite
Inventory
Accounting
Utilities
Reports
Links

Accounting \ Receive Payment From Client

Res # 1765139

Payment Type

☒ Credit Card
☐ Pre-Paid Deposit
☐ Check
☐ Cash

Payor
Lynda Fish

Card Type
Visa

Card Number
...1111

Expire
12/20

Lookup / Add

Processed By

☒ Supplier
☐ Agency
☐ Split

Exact Name on Card

Credit Card Nickname
Lynda L Fish

Payment Date
31 Aug 2017

Payment Amount
\$182.36

Currency
USD

Unapplied Payment
\$0.00

Create Invoice

Apply on Check-In Date

Vendor	Res. #	Guest	Curr.	Conv.	Owed	Applied
Royal Caribbean International	1765139	Lynda Fish	USD	-	\$3,497.26	
pinSIGHT 2.0	1765139	Lynda Fish	USD	-	\$0.00	\$182.36

Save

Cancel

Return to Res

Step 17: In the Res Info Tab the booking shows the pinSIGHT line item paid in full and that you are only waiting on commission from the vendor.

AGENTMATE

Res # 1765139

DashboardClientReservationsPro SuiteInventoryAccountingUtilitiesReportsLinks

Reservation Maintenance \ Information

BranchMain Office

Res. InfoClient InfoBookingRes. PricingInvoiceTransactionsAdjustmentsCancel

Guest List

Lynda Fish
Sarah Tam

Status

Booked

Counselor

Theresa Scurry-DEMO

Activity

Allure of the Seas

Occupied Category

2S

Purchased Category

2S

Sync Cats

☒

Booked Date

30 Aug 2017

Departure Date

15 Oct 2017

Change

Return Date

22 Oct 2017

Group

Cabin #

Itinerary Name

7 day Caribbean from Fort Lauderdale, Florida

Duration

7 days

Destination

Caribbean

Detail

Pricing SummaryPricing DetailAttachmentsVendor InfoCounselor Comms

Single Guest Accounting

Vendor	Curr.	Price	Cost	Comm.	Profit	Taxes	C. Paid	C. Bal.	V. Paid	V. Bal.	Yield
Summary	USD	\$4,179.62	\$3,644.66	\$534.96	\$534.96	\$740.32	\$682.36	\$3,497.26	\$682.36	\$2,962.30	12.79%
Royal Caribbean International	USD	\$3,997.26	\$3,469.26	\$528.00	\$528.00	\$697.26			\$500.00	\$2,969.26	13.20%
pinSIGHT 2.0	USD	\$182.36	\$175.40	\$6.96	\$6.96	\$43.06			\$182.36	(\$6.96)	3.81%

NotesCross ReferencesGuest DatesSingle Payer

DateTimeDescription

Edit

Reminders

DateActivityStatus

30 Aug 2017Vendor final payment - Royal Caribbean Intern...Open

30 Aug 2017Client final paymentOpen

30 Aug 2017Vendor deposit - Royal Caribbean Internationa...Open

Edit

SaveCancel