



## 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' dropdown menu open. The 'Counselor Privileges' option is highlighted. Red arrows and numbers indicate the steps: 1. Click on the 'Utilities' tab in the top navigation bar. 2. Click on 'Counselor Privileges' in the dropdown menu.

**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 page. A table lists various counselors. The 'DEMO-THERESA' row is selected. Red arrows and numbers indicate the steps: 1. Select a counselor from the list. 2. Click on 'Pro Suite' in the 'Modules' section. 3. 'pinSIGHT 2.0' appears in the 'Permissions' section.

| Privileges    | Role / Comm.        | Commissions | Contact Info. | Invoice | Integrations | Marketing Info | Interests |
|---------------|---------------------|-------------|---------------|---------|--------------|----------------|-----------|
| DEMO-TERESA   | Teresa Perrier      |             |               |         |              |                |           |
| DEMO-TERESAB  | Teresa Budziak      |             |               |         |              |                |           |
| DEMO-TERESA   | Teresa Cory         |             |               |         |              |                |           |
| DEMO-TERESE   | Terese Carena       |             |               |         |              |                |           |
| DEMO-TC       | TERRI PHELPS        |             |               |         |              |                |           |
| DEMO-TERRY    | Terry Woodridge     |             |               |         |              |                |           |
| TEST123       | Test Test2          |             |               |         |              |                |           |
| TEST1234      | Test123 123Test     |             |               |         |              |                |           |
| TEST-TEST!    | TestTest Test       |             |               |         |              |                |           |
| DEMO-THERESA  | Theresa Scurry-DEMO |             |               |         |              |                |           |
| DEMO-THERESA2 | Theresa Scurry2     |             |               |         |              |                |           |
| DEMO-TIM      | Tim Carlson         |             |               |         |              |                |           |

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

The screenshot shows the 'Counselor Privileges' configuration page with the 'Integrations' tab selected. The 'DEMO-THERESA' row is still selected in the table. The 'Integrations' tab is highlighted in the top navigation bar.

**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:  1

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**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

| 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% |

Notes | Cross References | Guest Dates | Single Payor

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   |

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

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 Item | New

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

Invoice Description: 7 day Caribbean from Fort Lauderdale, Florida

Comments

**PRO-Suite Quick Add**

**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.

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

**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.



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

**Demo and Training** Welcome Theresa Scarry DEMO | Sign Out | Help

Dashboard Client Reservations Pro Suite Inventory Accounting Utilities Reports Links

Reservation Maintenance \ Pricing Res # 1765139

Res. Info Client Info Booking **Res. Pricing** Actions Adjustments Cancel

**Item**  
Cruise - Royal Caribbean International (\*)

Type: Cruise Currency: USD Primary (\*)  
Vendor: Royal Caribbean International  
Confirm. #: 13454894 Booking Method/Agent:

Invoice Description: 7 day Caribbean from Fort Lauderdale, Florida

PRG Suite Quick Add Hotel

Remove Select Add-on New

Departure Date: 29 Oct 2017 Return Date: 05 Nov 2017 Fare Code: Cruise Tour Segments

**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.

**Demo and Training** Welcome Theresa Scarry DEMO | Sign Out | Help

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 (\*)  
Hotel - pinSIGHT 2.0

Type: Hotel Currency: USD Primary (\*)  
Vendor: pinSIGHT 2.0  
Confirm. #: 980337 Booking Method/Agent:

Invoice Description: Hotel - B Ocean Resort/Oct 28 2017 - Oct 29 2017

PRG Suite Quick Add Hotel

Remove Select Add-on New

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 Felt |          |
|-------------------|------------|----------|
| 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  |

**Step 15:** Next, you'll need to post the payment for the Hotel.

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 | Amount   | Unit |
|--------------------|------------|----------|------|
| 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   |      |
| Total Cost         |            |          |      |
| Gateway City       |            |          |      |
| Hotel Number       |            |          |      |

Collect at time of deposit  
Deposit: \$0.00

 Save Cancel

**Step 16:** **Select** a credit card, then **Enter** in the payment amount and **Click** Save.

**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

AGENTMATE

Dashboard | Client | Reservations | Pro State | Inventory | Accounting | Utilities | Reports | Links

Accounting \ Receive Payment From Client | Res # 1765139

Payment Type:  Credit Card  Pre-Paid Deposit  Check  Cash | Payer: Lynda Fish

Card Type: Visa | Card Number: ...1111 | Expire: 12/20 | [Lookup / Add](#) | Processed By: [i]

Credit Card Nickname: | Exact Name on Card: Lynda L Fish |  Supplier  Agency  Split

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     | <b>\$182.36</b> |

 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.

Welcome Theresa Scurry-DEMO | Sign Out | Help

## Demo and Training

AGENTMATE

Dashboard | Client | Reservations | Pro Suite | Inventory | Accounting | Utilities | Reports | Links

Reservation Maintenance \ Information Branch: Main Office Res # 1765139

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

**Guest List**

Lynda Fish  
Sarah Tam

Status: Booked Counselor: Theresa Scurry-DEMO Activity: Allure of the Seas Occupied Category: JS Purchased Category: JS Sync Cats:

Booked Date: 30 Aug 2017 Departure Date: 15 Oct 2017 Return Date: 22 Oct 2017 Group: Cabin #

Itinerary Name: 7 day Caribbean from Fort Lauderdale, Florida Duration: 7 days Destination: Caribbean [Detail](#)

Pricing Summary  Pricing Detail  Attachments  Vendor Info  Counselor 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%  |

[Edit Accounts](#)

Notes  Cross References  Guest Dates  Single Payor

| Date | Time | Description |
|------|------|-------------|
|      |      |             |

[Edit](#)

**Reminders**

| Date        | Activity   | Status |
|-------------|--|--------|
| 30 Aug 2017 | Vendor final payment - Royal Caribbean Intern... | Open   |
| 30 Aug 2017 | Client final payment                             | Open   |
| 30 Aug 2017 | Vendor deposit - Royal Caribbean Internationa... | Open   |

[Edit](#)

Open  All

[Save](#) [Cancel](#)