

AgentMate Release – Supplemental Notes

Engagement Modification Tracking and Access

Screen: Utilities > Agency Defaults – CRM / Marketing Defaults

Under *Utilities > Agency Defaults*, a change was made to the **Vendor Profile** tab appearing under the *CRM / Marketing Defaults* radio button.

The **Vendor Profile** tab has been eliminated; the area to opt-in **Supported Vendors** for Engagement now appears under the new **Engagement** tab.

More information on the other options available will be rolled out later.

Utilities \ Engagement

Agency / Reservation / Invoice / Accounting Defaults ☒ CRM / Marketing Defaults ☐ Vendor Integrations

Guest Defaults Marketing Sources Interest Setup Letter Templates Guest Comms CE Reminders Group Publishing Engagement Store Attachment

Vendor Tab activities moved to Engagement Tab

☒ Supported Vendors ☐ Activity History

ing vendors as you desire. HQ will only include your store's database in future preferred vendor marketing initia

to all Branches.

Vendor Type

Vendor

Agency / Reservation / Invoice / Accounting Defaults ☒ CRM / Marketing Defaults ☐ Vendor Integrations

Guest Defaults Marketing Sources Interest Setup Letter Templates Guest Comms CE Reminders Group Publishing Engagement Store Attachment

☐ Engagement Access ☒ Supported Vendors ☐ Activity History

Choose as many of the following vendors as you desire. HQ will only include your store's database in future preferred vendor marketing is opted-in below.

Vendor Selections will apply to all Branches.

Vendor Type

☒ < ALL >

☐ Air

☐ Bus

☐ Cancellation Fee

☐ Car Rental

☐ Cruise

☐ Discount

☐ Gift

☐ Hotel

☐ Insurance

☐ Other

☐ Rail

☐ Shore Excursion

☐ Tour

☐ Transfer

☐ Vacation Package

Vendor	
Abercrombie & Kent	<input type="checkbox"/>
Adventures by Disney	<input type="checkbox"/>
Air New Zealand	<input type="checkbox"/>
Alaska Railroad	<input type="checkbox"/>
ALBATours	<input type="checkbox"/>
Allianz Global Assistance	<input type="checkbox"/>
AmaWaterways	<input type="checkbox"/>
Amtrak	<input type="checkbox"/>
Apple Vacations	<input type="checkbox"/>
Atlantis Events	<input type="checkbox"/>
Auto Europe	<input type="checkbox"/>
Avalon Waterways	<input type="checkbox"/>
Avanti	<input type="checkbox"/>
Azamara Club Cruises	<input type="checkbox"/>
Backafallsbyn	<input type="checkbox"/>
Blue Bay Grand Esmeralda	<input type="checkbox"/>

Save Cancel

Advanced Filtering Added to Unapplied Commissions

Screen: Accounting > Unapplied Commissions

Under *Accounting > Unapplied Commissions Matching*, an **Advanced Search** option was added. This will allow a user to search for Unapplied Commissions based on when they were entered into the application or, in the event the data was uploaded as part of the import file, the dates of travel or hotel property.

Dashboard / Accounting > Unapplied Commissions Matching

All Matched Unmatched Fuzzy

Vendor Type

Vendor

Primary Guest

Amount

Conf. #

Property ID

Posting Date From

Check-In Date

Posting Date To

Check-Out Date

[Advanced Search](#)

