

AgentMate Release - Supplemental Notes

Counselor Privileges Updates - Agent Profiler project (UX Improvement) Screen: *Utilities > Counselor Defaults / Privileges: Integrations*

An update to the *Utilities > Counselor Defaults/Privileges* screen to consolidate two tables and streamline the user experience.

The screenshot displays the 'Integrations' tab in the AgentMate interface. It is divided into two main sections. The left section, titled 'Agent Universe, CruisePRO, Agent Profiler', contains a table with the following data:

Permission Name	
AU Access	<input type="checkbox"/>
AU Sync ID	
Agency Main Contact	<input type="checkbox"/>
Agency Preferred Supplier Sales Report	<input type="checkbox"/>
Affiliation Letter Status	<input type="checkbox"/>
Automatically open a window upon AgentMate login	<input type="checkbox"/>
Engagement View	<input type="checkbox"/>
Engagement Administration	<input type="checkbox"/>
Agent Profiler Permission Management	<input type="checkbox"/>
AP Agent ID	

The right section, titled 'Agent Universe & CruisePRO Permissions', contains a table with the following data:

Permission Name	
AU Access	<input type="checkbox"/>
CruisePRO Access	<input type="checkbox"/>
AU Sync ID	91303CHTEST5
Agency Main Contact	<input type="checkbox"/>
Agency Preferred Supplier Sales Report	<input type="checkbox"/>
Affiliation Letter Status	<input type="checkbox"/>
Automatically open a window upon AgentMate login	<input type="checkbox"/>

Below this is the 'Agent Profiler' section with a table:

Permission Name	Permission
Engagement View	<input type="checkbox"/>
Engagement Administration	<input type="checkbox"/>
Agent Profiler Permission Management	<input type="checkbox"/>

A red box highlights the 'Engagement View', 'Engagement Administration', and 'Agent Profiler Permission Management' rows in both tables. A red arrow points from the left table to the right table, indicating the consolidation of these rows. Other elements include 'AgentMate Login Name', 'Post Release State', and 'Current State' fields.

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Vendor Commission Upload File by Vendor ID (New Function) (primarily used by Head Office employees)

Accounting > Receive Payment from Vendor - Enter as Unapplied Accounting > Receive Payment from Vendor - Enter as Unapplied



A new mapping field is being added in preparation for a new field type that the Nexion Business unit processes. This field will allow the mapping of a Hotel code vs mapping of Vendor name. New mapping codes will need to be added at the Head Office level via a request sent to AgentMate Support. The new mapping options will be available under the Enter as Unapplied/Upload CSV option available at the top right side of the screen.

If using **Vendor Code**, **Travel Type** is an available option (Air, Car, Hotel, etc); this is used in the instance where two vendors of different types have the same name. If using **Ticket Designator**, **Travel Type** is **not** an option.

Examples (Destination Field = Vendor Code, Destination Field Name = Ticket Designator):

CSV File Import

Please browse for the .CSV file to upload, and click OK:



test csv file.csv  

Origin Field Names	Destination Field Names
-- Select --	Vendor Code *
-- Select --	Travel Type
-- Select --	Confirmation Number *
-- Select --	Guest Name
-- Select --	Amount *
-- Select --	Property ID
-- Select --	Property Name
-- Select --	Checkin Date
-- Select --	Number of Nights

Currency Disregard First Row (Column Headers)
 Save Template
 Use Template

CSV File Import

Please browse for the .CSV file to upload, and click OK:

test csv file.csv  

Origin Field Names	Destination Field Names
-- Select --	Ticket Designator *
-- Select --	Confirmation Number *
-- Select --	Guest Name
-- Select --	Amount *
-- Select --	Property ID
-- Select --	Property Name
-- Select --	Checkin Date
-- Select --	Number of Nights

Currency Disregard First Row (Column Headers)
 Save Template
 Use Template

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Asterisks on required fields 'Upload CSV' (UX Improvement)

Screen: Accounting > Receive Payment from Vendor - Enter as Unapplied Accounting > Receive Payment from Vendor - Enter as Unapplied

When uploading a CSV file into the application there will be Asterisks (*) to denote which fields must be populated for the import to be successful.

CSV File Import

Please browse for the .CSV file to upload, and click OK:

NPC.csv  

Origin Field Names	Destination Field Names
-- Select --	Vendor Code *
-- Select --	Travel Type
-- Select --	Confirmation Number *
-- Select --	Guest Name
-- Select --	Amount *
-- Select --	Property ID
-- Select --	Property Name
-- Select --	Checkin Date
-- Select --	Number of Nights

Currency

Disregard First Row (Column Headers)
 Save Template
 Use Template

Import Cancel

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Remove Open Last Group and Open Last Res (UX Improvement) Screen: Dashboard

The **Open Last Group** and **Open Last Res** icons have been removed. Most users find the Recent Items button on the left of the screen is more useful, as it allows you to access more than just the last reservation or group.

The screenshot shows the AgentMate Dashboard interface. A yellow callout box in the top left corner states "Last Res/Last Group Shortcuts Removed". In the top navigation bar, the "Open Last Res" and "Open Last Group" icons are circled in red with a diagonal slash through them, indicating they have been removed. The "Recent Items" list on the left is highlighted with a green box, showing a list of reservations and groups. The "Invoice" section is visible on the right, showing options for "Res. Pricing", "Invoice", "Transactions", "Adjustments", and "Cancel". The "Invoice Notes" section is also visible, showing a list of notes for the selected item.

Note
DOCUMENTATION REQUIREMENTS: You have indicat...
Agency Disclaimer: [BRANCH_NAME], an independ

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Reorder Group/Promotion Type (UX Improvement)

Screen: Inventory > Search All Cruise Inventory

When arriving on an itinerary that has multiple groups/promotions, and you click on the line with the Promos, the *presentation order* on the *Details* screen (which presents the different Promos by Booking Type with radio buttons for each available option) has been updated to sort from Alpha-number by type to now sort by Booking Type: **Agency Group, Shared Group, Agency Promotion, Brand Level/Shared Promotion, FIT**

Example old view and new view (2 DV promotions, an Agency Group and an FIT pricing available):

