

Retrieve ProSuite Booking – Custom Bookings Import

User Group: All Business/Limited User Facing

Summary: AgentMate now offers the ability to pull-in a completed booking from a custom 3rd party with limited manual data entry required. The Custom /AgentMate integration and counselor permission must be enabled for this function to work. This is available for all Brands; however, an API must be built out for this to work. This functionality works just like the CruisePRO import functionality.

This is the user face for API Integrations. **There is a cost associated and Agencies will need developers to code to our API.** This is a standard API that will import Reservations/Reservation forms from a 3rd party. Implementation is dependent on many factors and will be determined after an initial consultation of project.

If interested, please reach out your BSM or business unit management.

Activating the Custom Import Functionally from Head Office (Green Screen)

1. If you are not a corporate level (green screen) user, you will need to request assistance you're your support department.
2. From the corporate level, navigate to *Utilities > Agency Set*
3. Select *Brand & Agency*
4. On the right side, navigate to **Custom Import**
5. Select **Yes**

Activating the Counselor Permission

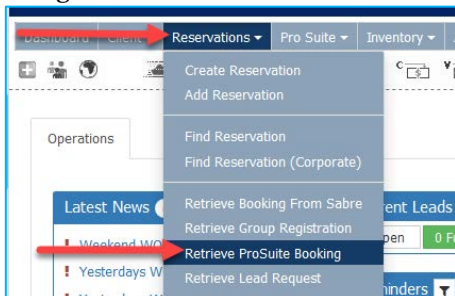
1. Navigate to *Utilities > Counselor Privileges*
2. Select **Counselor**
3. Once selected, click on **Reservations** under *Modules*
4. Click on **Retrieve ProSuite Booking**
5. Press **Save**

Retrieve Booking from the Custom Import

- From AgentMate, there are two ways to retrieve and import a booking: through *Reservations > Retrieve ProSuite Booking* or via the *Critical Notifications* dashboard.

Option# 1: Reservation > Retrieve ProSuite Booking

1. Navigate to Reservation > *Retrieve ProSuite Booking*



- Click on the radio button **Custom Bookings**; a list of imported bookings will display

Reservation \ Retrieve ProSuite Booking

CruisePRO Bookings
 pinSIGHT Bookings
 Custom Bookings
 Counselor
Jenny McGrath

Date Submitted	Conf #	Dep. Date	Ship	Category	Primary Guest	
21 Mar 2019	NOR55698798	05 Jul 2019	Norwegian Sun	ZD	Barbara Rozler	<input type="checkbox"/>
17 Apr 2019	8654997	23 Feb 2020	Oasis of the Seas	ZI	Jonathan Rutledge	<input type="checkbox"/>
17 Apr 2019	24482666	13 Nov 2020	Costa Pacifica	IV	Michael Stamper	<input type="checkbox"/>
17 Apr 2019	40396138	24 Mar 2019	Norwegian Getaway	BX Balcony	William Robinson	<input type="checkbox"/>
17 Apr 2019	CW663D	17 Aug 2019	Crown Princess	ME Balcony	Ng Hung	<input type="checkbox"/>

- Select the booking you wish to import into a reservation
 - The line selected will highlight in **blue** and the passenger information will populate below
 - Each passenger will display
 - If the Client currently exists within AgentMate**, you will be given two options
 - Create a new profile
 - Select the profile with the address (this is the existing name within the system)
 - Select by clicking on one of the radio tabs presented
 - If the Client does not exist within AgentMate**, you are given one option
 - Create a new Customer. AgentMate will create the Client profile on your behalf

CruisePRO Bookings
 pinSIGHT Bookings
 Custom Bookings
 Counselor

Date Submitted	Conf #	Dep. Date	Ship	Category	Primary Guest	
21 Mar 2019		05 Jul 2019	Norwegian Sun	ZD		<input type="checkbox"/>
17 Apr 2019		23 Feb 2020	Oasis of the Seas	ZI		<input type="checkbox"/>
17 Apr 2019		13 Nov 2020	Costa Pacifica	IV		<input type="checkbox"/>
17 Apr 2019		24 Mar 2019	Norwegian Getaway	BX Balcony	William Robinson	<input type="checkbox"/>
17 Apr 2019		17 Aug 2019	Crown Princess	ME Balcony		<input type="checkbox"/>

Passenger Information

Tips & Instructions

Please review customer information coming from external systems, and match them with existing AgentMate customers, or either create new ones.

WILLIAM ROBINSON

William Robinson - [50 Upper
william@dummy-mail.com]
 Create New Customer

DIANA ROBINSON

Create New Customer

Booking Information

Res. Marketing Source

Counselor

Branch

Note: *Tips & Instructions* on the left side reminds you how this area works

- Choose **Res. Marketing Source**
- Select **Counselor**
 - Counselor will default, **IF** the Counselor's permissions are *Restrict to Own Data*
 - If permissions are not restricted, select Counselor
- Select **Branch** (default will be Counselor's branch)

Booking Information

Res. Marketing Source

Counselor

Branch



7. To complete the import, press **Enter As Booking** or **Enter As Quote**

existing AgentMate customers, or either create new ones. **DIANA ROBINSON** Create New Customer branch

Option #2 Imports via Critical Notifications

1. Navigate to the Critical Notifications on the Dashboard
2. Click on **Custom bookings in queue! Process Now** to be redirected to the **Retrieve ProSuite Booking** screen

Latest News **6**

- Weekend WOW'S** 29 Mar 2016
- Yesterdays WOW's** 24 Mar 2016
- Yesterdays WOW's** 23 Mar 2016
- Yesterdays WOW's** 18 Mar 2016

Current Leads

69 Open 0 Future 0 Today 69 Overdue

Reminders + -

Critical Notifications **3**

- Online payments in queue! [Process Now](#)
- CruisePRO bookings in queue! [Process Now](#)
- Custom bookings in queue! Process Now**

3. Select the booking you wish to import into a reservation
 - A. The line selected will highlight in **blue** and the passenger information will populate below
 - B. Each passenger will display
 - i. **If the Client currently exists within AgentMate**, you will be given two options
 - a. Create a new profile
 - b. Select the profile with the address (this is the existing name within the system)
 - c. Select by clicking on one of the radio tabs presented
 - ii. **If the Client does not exist within AgentMate**, you are given one option
 - a. Create a new Customer. AgentMate will create the Client profile on your behalf

Counselor

CruisePRO Bookings pinSIGHT Bookings Custom Bookings

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17 Apr 2019		23 Feb 2020	Oasis of the Seas	ZI		<input type="checkbox"/>
17 Apr 2019		13 Nov 2020	Costa Pacifica	IV		<input type="checkbox"/>
17 Apr 2019		24 Mar 2019	Norwegian Getaway	BX Balkony	William Robinson	<input type="checkbox"/>
17 Apr 2019		17 Aug 2019	Crown Princess	ME Balkony		<input type="checkbox"/>

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Please review customer information coming from external systems, and match them with existing AgentMate customers, or either create new ones.

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William Robinson - [50 Upper
william@dummy-mail.com]

Create New Customer

DIANA ROBINSON

Create New Customer

Booking Information

Res. Marketing Source

Counselor

Branch



Note: *Tips & Instructions* on the left side reminds you how this area works

4. Choose **Res. Marketing Source**
5. Select **Counselor**
 - A. Counselor will default, **IF** the Counselor's permissions are *Restrict to Own Data*
 - B. If permissions are not restricted, select Counselor
6. Select **Branch** (default will be Counselor's branch)

The screenshot shows a form titled "Booking Information" with three dropdown menus: "Res. Marketing Source", "Counselor", and "Branch". Each dropdown menu has a small downward arrow on the right side. The form is enclosed in a red border.

Additional Notes

- If you have selected to Enter as **Booked**, you will need to navigate to the *Receive Payment from Client* screen to document any payments that have already occurred with the vendor.
- If you have a group in AgentMate for the **same ship and sail date of your imported custom booking**, you will be presented with an option to associate your new booking to the group. You will need to check the box next to the group number to book the reservation into the group. Once you check the box and click **Enter as a Booking**, it will direct you to the newly created booking within AgentMate.
- You can associate an AgentMate lead to the booking. The lead matching table will appear only if there's at least one lead matched. The matching is done based on the selected customers, for leads on **Open** and **Quoted (On Option)** status.