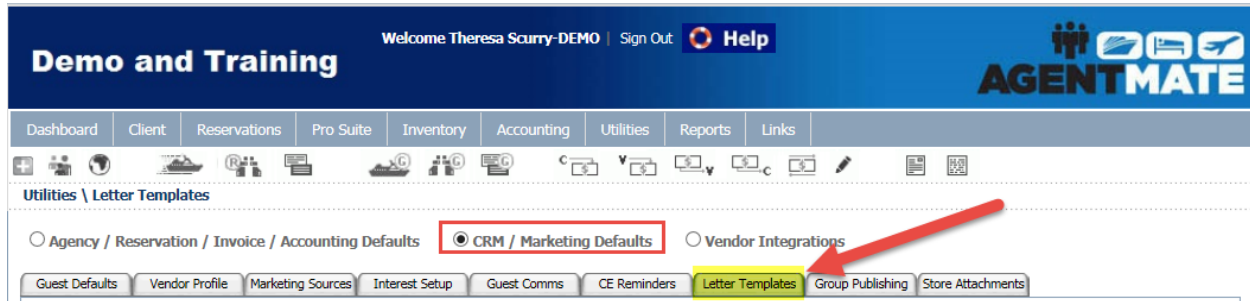


Invoice Letter Templates – Creating, Using, Managing

To Create a New Letter Template

1. Navigate to *Utilities > Agency Defaults*
2. Select the *CRM/Marketing Defaults* radio button and click on the *Letter Templates* tab.



3. Select <NEW> to create a new letter in the **Template Library**.
4. Use the blank area in the bottom right side of the screen to create your new invoice letter templates.
 - a. You may use the **MERGE FIELDS** drop down to insert fields to auto populate AgentMate fields into the template.
5. Enter a name for the template under **Letter Template Name**.
6. Select a **Category** from the drop-down.
7. Press **Save**

A screenshot of the "Template Library" and "Letter Template" creation form. The "Template Library" is on the left, showing a list of templates: "<NEW>", "Welcome Home", "Bon Voyage", and "First Contact". The "Letter Template" form is on the right, with a "Merge Fields" dropdown menu. The form contains the following text: "Dear [FIRST_NAME]", "Thank you for booking with me! I hope you are ready for a great time! You are currently booked on the [SHIP], departing on [DEPARTURE_DATE].", "You will receive several emails between now and your departure date, which will provide a multitude of information regarding your trip, shore excursions, travel insurance, etc.", "You will see a few links at the bottom of this email with information about these items.", "Please do not hesitate to contact me, if you have any questions.", "[COUNSELOR_NAME]", "[COUNSELOR_PHONE_NUMBER]", and "[COUNSELOR_EMAIL]". Below the form, there are three buttons: "Save", "Cancel", and "Delete".

Please Note: These letters will only appear to be selected on the invoice email, IF they are assigned to the Invoice Template category.

Adding a Category to the Template Library

1. Navigate to *Utilities > Agency Defaults*.
2. Select the **Agency/Reservation/Invoice/Accounting Defaults** radio button.
3. Select the **General List** tab.
4. Under *List Type*, select **Letter Template Category**.
5. Under *List Item*:
 - a. To Create a New Category, select **<NEW>**, enter **List Item Name**, press **Save**.
 - b. To Edit, select the *List Item* you wish to change, edit under **List Item Name**, press **Save**.

Utilities \ General List Setup

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

Agency Info Branches Invoice Event Dates Accounting Custom Logo General List Expense Setup Lead Defaults

List Type

- Assignment Categories
- Berthing
- Bus Stop
- Cancellation Reason
- Car Type
- Confirmation Type
- Corporate Charge Reason
- Counselor Billing
- Credit Card
- Diet
- Dining Preference
- Discount Type
- Docs Send Method
- Expenses
- GL Accounts
- Letter Template Category
- ☒ Suppress Inactive Items

List Item

- < NEW >
- Alert
- Bon Voyage
- Nexion Internal
- Nexion Internal
- Nexion Internal
- Nexion Internal
- Nexion Internal
- Post Booking
- Promotion HTML Templates
- Quote
- Welcome Home

List Item Name

☐ Default

Save Cancel Inactivate

Selecting an Email Invoice Template Default

1. Navigate to *Agency Defaults*.
2. Select the **Agency/Reservation/Invoice/Accounting Defaults** radio button.
3. Click on the **Invoice** tab.
4. From the **Default Email Invoice Template** drop down, select one of the templates created or **<NONE>**.

Demo and Training Welcome Theresa Scurry-DEMO Sign Out Help

AGENTMATE

Dashboard Client Reservations Pro Suite Inventory Accounting Utilities Reports Links

Utilities \ NEW Invoice

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

Agency Info Branches Invoice Event Dates Accounting Custom Logo General List Expense Setup Lead Defaults

☒ Defaults and Notes ☐ Insurance Disclaimer ☐ Online Payments

Default Header
Option 2 [View Sample](#)

Default Email Invoice Template
< NONE >
Invoice Letter 1

☒ Bundle Port Taxes with Cruise Fare By Default
☐ Bundle Insurance Policy Fee By Default

Final Payment Note

Cancellation Note

5. Press **Save**.

Using an Email Invoice Template

1. When generating an invoice to send to the client, navigate to the **Invoice** tab of the AgentMate reservation.
2. Click **Preview Invoice**.
3. Once the invoice is generated, click the **Email** button in the top right corner; the email pop-up box will appear.
4. Select an *Email Invoice Template*, if desired; OR type a new letter into the space provided.
 - a. The default Invoice Template, if designated, will be selected.
 - b. If multiple Invoice Templates were created, select one of those from the Email Invoice Template drop down.

Email

From:

tscurry@noemail.com

To:

stam@noemail.com

BCC:

☐ BCC Agent of Record

Email Invoice Template

Invoice Letter 1

Subject:

Your Journeys by Josh Reservation [1765631]

Attachments:

[Invoice1765631A.pdf](#)

Dear [FIRST_NAME]

Thank you for booking with me! I hope you are ready for a great time! You are currently booked on the [SHIP], departing on [DEPARTURE_DATE].

You will receive several emails between now and your departure date, which will provide a multitude of information regarding you trip, shore excursions, travel insurance, etc.

You will see a few links at the bottom of this email with information about these items.

Please do not hesitate to contact me, if you have any questions.

FROM: [NAME]

Include Attachment from Library

Name	Category	Description	Preview	
Insurance Declined	Test Category	Client has declined insurance, but we are providing the information so they will reconsider.		☒

Send

Cancel

5. Make additional modifications/customizations, if needed, in the body of the Invoice Letter.
6. Press **Send**.