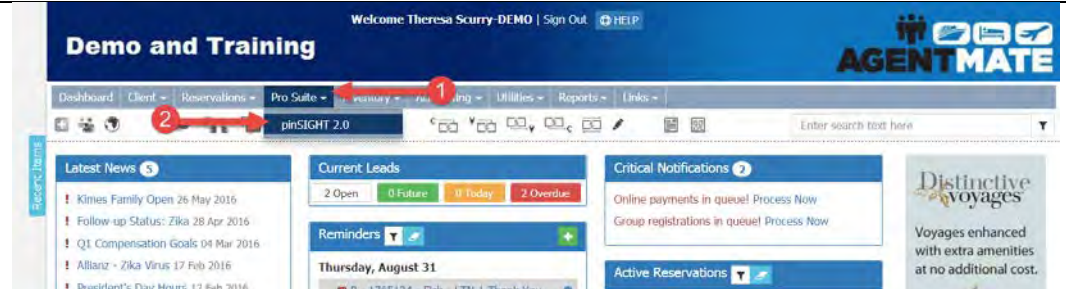


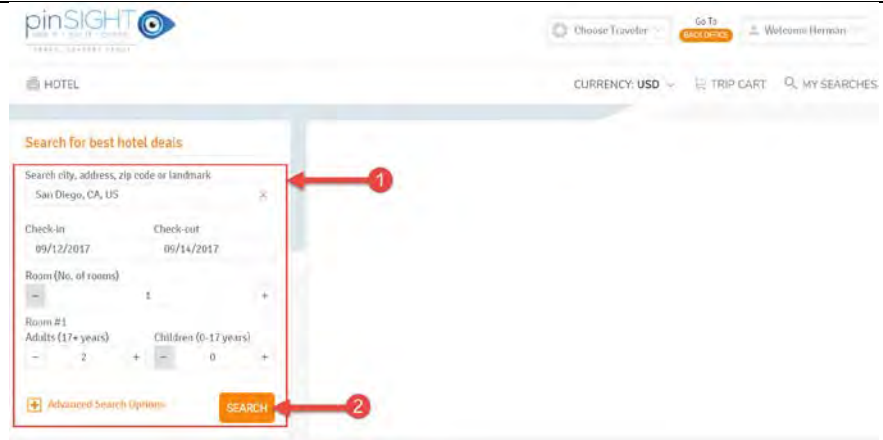
Retrieve a pinSIGHT 2.0 Booking in AgentMate

AgentMate allows you to launch pinSIGHT via a Single Sign On option, create your pinSIGHT reservation and then bring that reservation back into AgentMate.

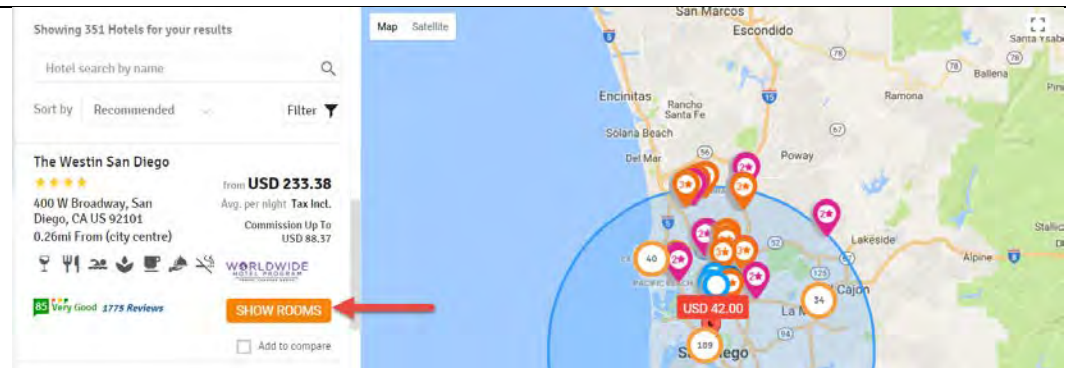
Step 1: To get started **Click** on the Pro Suite Tab and **Select** pinSIGHT 2.0 from the menu.



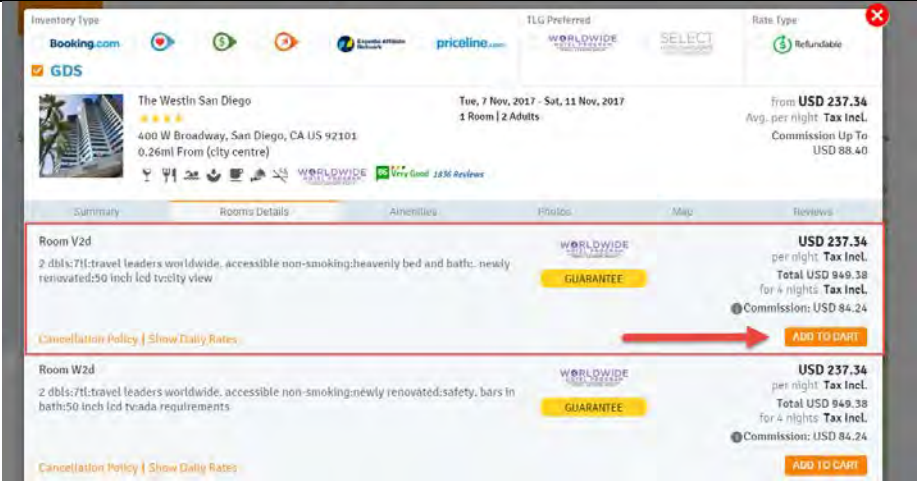
Step 2: pinSIGHT launches in a new window. **Enter** in the information in the red box and then **Click** Search.



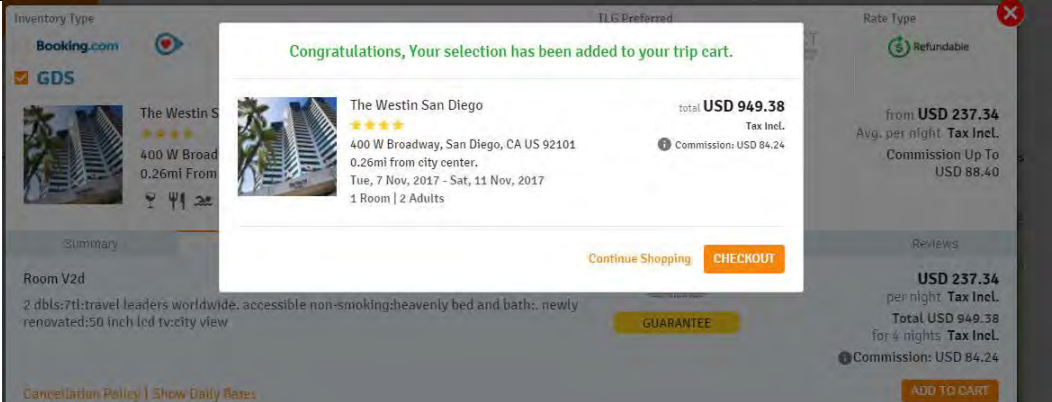
Step 3: Once you've selected your hotel, **Click** on Show Rooms.



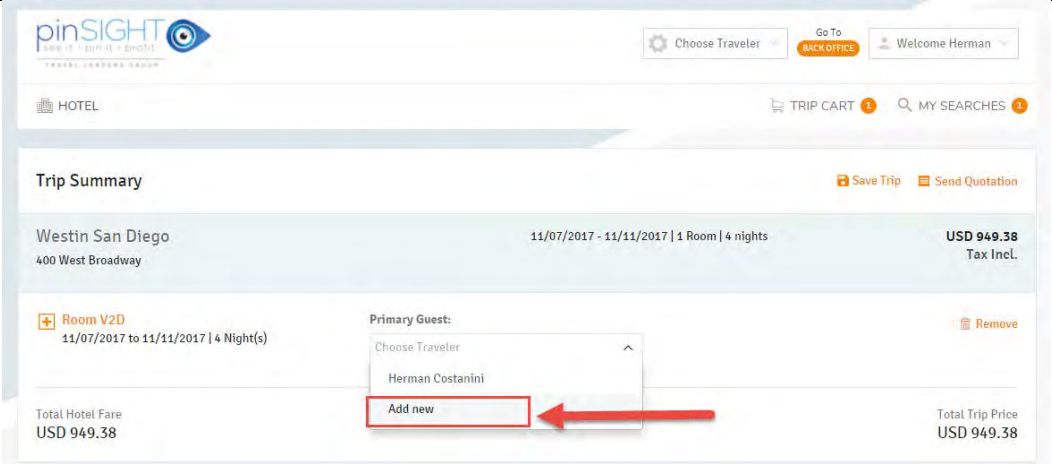
Step 4: After selecting a room type, **Click** Add to Cart.



Step 5: Your hotel has been added to your cart and you can **Select** Checkout.



Step 6: On the Trip Summary screen, you will need to click the **Choose** Traveler dropdown, and **Select** Add New.



Step 7: After selecting Add New, the page expands and allows you to *Enter* in first and last name of the primary guest.

Westin San Diego
400 West Broadway

11/07/2017 - 11/11/2017 | 1 Room | 4 nights

USD 949.38
Tax Incl.

Room V2D
11/07/2017 to 11/11/2017 | 4 Night(s)

Remove

2D BEDS:TRAVEL LEADERS WORLDWIDEACCESSIBLE NON-SMOKING:HEAVENLY BED AND BATH:. NEWLY RENOVATED:50 INCH LCD TV:CITY VIEW

No. of Guest
2 Adults

WORLDWIDE
HOTEL COLLECTION
TRAVEL LEADERS GROUP

Cancellation Policies
CANCEL BY 1 DAYS PRIOR TO AVOID 100.00 PCT PENALTY.

Primary Guest

Lynda

Fish

Pricing and Payments

Total base fare	Total Taxes & Fees	Agent Commission	Discount	Service Fees	Room Price
USD 842.40	USD 106.98	USD 84.24	USD 0.00	USD 0.00	USD 949.38

Step 8: *Scroll down* to the Card Details section. The areas with the asterisks are required fields, and must be filled in before you are able to complete the booking.

After ensuring that the information is correct, *Click* Complete Booking.

* Card Number (Excluding spaces)
444433332221111

* CVV2/CID Number

* Name (as it appears on card)
Lynda Fish

* Expiration Date
April 2020

Billing Address (Please provide the address as it appears on the billing statement.)

* Address Line 1
3033 Campus Dr.

Address Line 2

* Country
United States

* State/Province
Minnesota

* City
Plymouth

* Zip Code
55441

Communication Details

* Phone Number
7653835642

* Email
heostantini@primerosystems.com

Grand Total: USD 496.44

☒ I hereby agree to the Travel Leaders Group terms and conditions for this purchase.

COMPLETE BOOKING

Step 9: Your pinSIGHT 2.0 booking is now confirmed

pinSIGHT
Thank you for booking with pinSIGHT!
Your reservation is booked. No need to call us to reconfirm this reservation.

The pinSIGHT Team

Your Trip ID - 980889

Westin San Diego Hotel
400 West Broadway, San Diego, CA, US, 92101

Nov 07 2017 - Nov 11 2017 | 1 Room | 4 Nights

Confirmation Invoice | Agent Invoice

Room V2D
Nov 07 2017 - Nov 11 2017 | 4 Nights

Booking Status: Confirmed

Supplier Code: C192218004

Room V2D
20 BEDS TRAVEL LEADERS WORLDWIDE ACCESSIBLE NON-SMOKING HEAVENLY BED AND BATH, NEWLY RENOVATED 50 INCH LCD TV CITY VIEW

Lynda Fish
2 Adults

Hotel Contact #

Cancellation Policies
CANCEL \$51.1 DAYS PRIOR TO AVOID 100.00 PCT PENALTY.

Pricing and Payments

Total Base Fare	Total Taxes & Fees	Agent Commission	Discount	Service Fees	Room Price
USD 842.40	USD 106.98	USD 84.24	---	---	USD 949.38

Pricing & Payments

Grand Total: USD 949.38

Card Number	Card Type	Card Holder Name	Amount
xxxxxxxxxxxx1111	VISA	Lynda Fish	USD 949.38

Step 10: Navigate back to AgentMate.

From the Reservations dropdown, **Select** the Retrieve ProSuite Booking from the menu.

Welcome Theresa Scurry-DEMO | Sign Out | HELP

Demo and Training

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

Marketing News

Agent Leads

Critical Notifications

Online payments in queue! Process Now

Group registrations in queue! Process Now

Distinctive Voyages

Voyages enhanced with extra amenities

Step 11: On this screen, **Select** the pinSIGHT bookings radio button.

Welcome Theresa Scurry-DEMO | Sign Out | HELP

Demo and Training

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

Reservation \ Retrieve ProSuite Booking

☐ CruisePRO Bookings ☒ pinSIGHT Bookings

Counselor: Theresa Scurry-DEMO

Date Submitted	Conf #	Check-In Date	Check-Out Date	Hotel Name	Lead Passenger
31 Aug 2017	980889	07 Nov 2017	11 Nov 2017	Westin San Diego	Lynda Fish

Step 12: After the pinSIGHT booking is selected in the top section of the screen, one of two things can be done.

1. The pinSIGHT booking can be entered in AgentMate as a completely new reservation.
2. The pinSIGHT booking can be associated to an already existing AgentMate booking. If the selected option is #2, find the previously existing AgentMate booking in the list of reservations and select it.

Welcome Theresa Scurry-DEMO | Sign Out | Help

AGENTMATE

DashboardClientReservationsPro SuiteInventoryAccountingUtilitiesReportsLinks

Reservation \ Retrieve ProSuite Booking

CruisePRO BookingspinSIGHT Bookings

CounselorTheresa Scurry-DEMO

Date Submitted	Conf #	Check-In Date	Check-Out Date	Hotel Name	Lead Passenger
31 Aug 2017	980889	07 Nov 2017	11 Nov 2017	Westin San Diego	Lynda Fish

Associate to Reservation

Reservation

Res #	Product Type	Conf #	Vendor	Lead Passenger	Dep. Date	Counselor
< NEW >						
1765145	Hotel	980620	pinSIGHT 2.0	Jason Scurry	13 Sep 2017	Theresa Scurry-DEMO
1765019	Cruise	45465256	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO
1765095	Cruise	546813564	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO
1765098	Cruise	546894645	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO
1765108	Cruise	6454984	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO

Show 25 50 100 results per page << < 1 2 > >>

Passengers

Passenger Name

Step 13: If the client already exists in the Agency's AgentMate database, those clients will display at the bottom of the screen.

The previously existing client can be selected, or the Create New Customer option can be selected.

Welcome Theresa Scurry-DEMO | Sign Out | Help

AGENTMATE

DashboardClientReservationsPro SuiteInventoryAccountingUtilitiesReportsLinks

Reservation \ Retrieve ProSuite Booking

CruisePRO BookingspinSIGHT Bookings

CounselorTheresa Scurry-DEMO

Date Submitted	Conf #	Check-In Date	Check-Out Date	Hotel Name	Lead Passenger
31 Aug 2017	980889	07 Nov 2017	11 Nov 2017	Westin San Diego	Lynda Fish

Associate to Reservation

Reservation

Res #	Product Type	Conf #	Vendor	Lead Passenger	Dep. Date	Counselor
< NEW >						
1765145	Hotel	980620	pinSIGHT 2.0	Jason Scurry	13 Sep 2017	Theresa Scurry-DEMO
1765019	Cruise	45465256	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO
1765095	Cruise	546813564	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO
1765098	Cruise	546894645	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO
1765108	Cruise	6454984	Royal Caribbean International	Lynda Fish	15 Oct 2017	Theresa Scurry-DEMO

Show 25 50 100 results per page << < 1 2 > >>

Passengers

Passenger Name

Passenger Information

Tips & Instructions

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

LYNDA FISH

Lynda Fish - [1903 West Oakes Drive, St. Cloud, MN, 56303, lynda@dummy-mail.com]

Lynda Fish - [43889 Basketball Lane, Charlotte, NC, 28216, LLFish@noemail.com]

Create New Customer

Booking Information

Res. Marketing Source

CounselorTheresa Scurry-DEMO

BranchMain Office

Enter As Booking

Enter As Quote

Step 14: After selecting a client profile to append the reservation to, select a Reservation Marketing Source and **Click** Enter as Booking

Passenger Information

Tips & Instructions
Please review customer information coming from pinSIGHT, and match them with existing AgentMate customers, or either create new ones.

LYNDA FISH

- Lynda Fish - [1903 West Oakes Drive, St. Cloud, MN, 56303, lynda@dummy-mail.com]
- Lynda Fish - [45889 Basketball Lane, Charlotte, NC, 28216, LFFish@noemail.com]
- Create New Customer

Booking Information

Res. Marketing Source
Weekly Email

Counselor
Theresa Scurry-DEMO

Branch
Main Office

Enter As Booking **Enter As Quote**

Step 15: Now the AgentMate reservation is completed, and the payment needs to be documented

Click on the Receive Payment from Client icon in the bottom left corner.

PLEASE NOTE: To have the commission auto-populate in the AgentMate Hotel line item, the Store Defaults Commission for pinSIGHT 2.0 needs to be set for 10% under **Utilities > Vendor Setup**.

Demo and Training Welcome Theresa Scurry-DEMO | Sign Out | Help

AGENTMATE

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

Reservation Maintenance \ Information Branch: Main Office Res # 1765153

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

Guest List
Lynda Fish

Status: Booked Counselor: Theresa Scurry-DEMO Activity: Hotel Occupied Category: Purchased Category: Sync Cats

Booked Date: 01 Sep 2017 Departure Date: 07 Nov 2017 Return Date: 11 Nov 2017 Group: Cabin #

Itinerary Name: Duration: 4 days Destination: Detail

Pricing Summary Pricing Detail Attachments Vendor Info Counselor Comms

Vendor	Curr.	Price	Cost	Comm.	Profit	Taxes	C. Paid	C. Bal	V. Paid	V. Bal	Yield
Summary	USD	\$949.38	\$865.14	\$84.24	\$84.24	\$106.98	\$0.00	\$949.38	\$0.00	\$865.14	8.87%
pinSIGHT 2.0	USD	\$949.38	\$865.14	\$84.24	\$84.24	\$106.98			\$0.00	\$865.14	8.87%

Notes Cross References Guest Dates Single Payor

Reminders

Date	Activity	Status
31 Aug 2017	Vendor deposit - ()	Open
31 Aug 2017	Client deposit	Open
17 Oct 2017	Documents due date	Open

Save **Cancel**

Step 16: Select a credit card, then Enter in the payment amount (with the same amount entered into the Applied column) and **Click** Save.

Demo and Training Welcome Theresa Scurry-DEMO | Sign Out | Help

AGENTMATE

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

Accounting \ Receive Payment From Client Res # 1765153

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

Card Type: Visa Card Number: ...1111 Expire: 12/20 **Lookup / Add** Processed By: Supplier Agency Split

Credit Card Nickname: Lynda L Fish Exact Name on Card: Lynda L Fish

Payment Date: 31 Aug 2017 Payment Amount: \$949.38 Currency: USD Unapplied Payment: \$0.00 Create Invoice: Apply on Check-In Date

Vendor	Res. #	Guest	Curr.	Conv.	Owed	Applied
pinSIGHT 2.0	1765153	Lynda Fish	USD	-	\$949.38	\$949.38

Save **Cancel** **Return to Res**

Step 17: Now the Res Info tab of the booking shows the pinSIGHT 2.0 line item paid in full, with commission due from pinSIGHT 2.0.

Demo and Training

Welcome Theresa Scurry-DEMO | Sign Out

Help

Dashboard
Client
Reservations
Pro Suite
Inventory
Accounting
Utilities
Reports
Links

Reservation Maintenance \ Information

Branch
Main Office

Res # 1765153

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

Guest List

Lynda Fish

Status
Booked

Counselor
Theresa Scurry-DEMO

Activity
Hotel

Occupied Category

Purchased Category

☒ Sync Cats

Booked Date
01 Sep 2017

Departure Date
07 Nov 2017
Change

Return Date
11 Nov 2017

Group

Cabin #

Itinerary Name

Duration
4 days

Destination

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	\$949.38	\$865.14	\$84.24	\$84.24	\$106.98	\$949.38	\$0.00	\$949.38	(\$84.24)	8.87%
pinSIGHT 2.0	USD	\$949.38	\$865.14	\$84.24	\$84.24	\$106.98			\$949.38	(\$84.24)	8.87%