

AgentMate Release - Supplemental Notes

Lead Dashboard Status (UX Improvement)

Screen: *Leads > Lead Dashboard*

An update to the *Leads > Lead Dashboard* status; **Lead Status** can only be changed to **Booked** status if it is associated to an active reservation. There previously was a workflow exception on the *Lead Dashboard* allowing a status change when no active reservation was associated. This has been updated so the process is consistent.

Leads \ Dashboard

Filter ▾

Counselor: Teresa ▾ 6 OPEN 0 FUTURE 0 TODAY 6 OVERDUE

☒ Include Unassigned Counselors

Batch Update

I	Status	G	Primary Guest	Origination Date/Days	Last Con Date	ation	Vendor	Comms		
Q	Open			in 2016 (705)			Holland America Line	🕒 📄 ! ☐		
Q	Open			in 2016			Holland America Line	🕒 📄 ! ☐		
Q	Open			ec 2016 (529)			Holland America Line	🕒 📄 ! ☐		
B	Open	+		6 Jan 2017 (484)	16 Jan 2017		Holland America Line	🕒 📄 ! ☐		
	Pending Acceptance	+		0 Jul 2017 (299)	20 Jul 2017 (299)	world		🕒 📄 ! ☐		
Q	Open	+		27 Dec 2016 (504)	27 Dec 2016 (504)	03 Apr 2017	UNASSIGNED	01 Apr 2017	Holland America Line	🕒 📄 ! ☐

Select New Status

- Open
- Accepted
- Dead
- Open
- Postponed
- Quoted (Informal)
- Quoted (Waitlisted)

"Booked" as a Lead Status is no longer able to be selected. To change a Lead Status to Booked, a Reservation must be associated to the Lead and then the status will automatically change

AgentMate Release - Supplemental Notes

New Product Type: Rail

Screens: Add Reservation and Reservation's 'Res Pricing' Screen, Reports, Vendor Setup

A new product Type for **Rail** has been added. The update was made based on user feedback. This change is reflected as an option under the Reservation Wizard and under an active reservation's *Res Pricing* screen. The *Vendor Setup* screen will provide opportunities to designate a vendor as primarily **Rail**. *Departure/Interactive SAR/Query Tool* Reports all present **Rail** information. The Invoice will display the **Rail** type, as well as the pricing and confirmation number; the **Train #**, **Depart/Arrival Station**, **Depart/Arrival Date** field boxes will be pushed through to populate on the invoice with a future release.

Item	
Rail - Amtrak (*)	
Type	Currency
Rail	USD
☒ Primary (*)	
Vendor	
Amtrak	
< SELECT CLIA/IATA >	
Confirm. #	Booking Method/Agent
Remove	Select Add-on
New	

Invoice Description				

Comments				

Train #	Depart station	Depart Date	Arrival Date	Arrival station
		15 Nov 2018	15 Nov 2018	