General Information

1. What is changing on November 2?

Beginning November 2, members will start seeing an updated version of several **AdvisorOS** screens (previously known as **AgentMate**). These enhancements are designed to provide a more modern, consistent, and efficient user experience while maintaining the familiar functionality members use every day.

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2. Why are these changes being implemented?

The updated experience is part of our ongoing effort to improve usability, performance, and maintainability across **AdvisorOS**. Our goal is to provide a more intuitive and efficient experience while preserving the functionality members rely on.

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3. Will all AdvisorOS screens change on November 2?

No. This is a **staged launch** that includes a selected group of screens. Additional screens and enhancements will be introduced in future releases.

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4. Which screens will be included in the staged launch?

The following screens will be included in the November 2 launch:

- **Account Setup**
- **Ad Setup**
- **Add Lead**
- **Advisor Defaults**
- **Agency Defaults**
- **Agency Setup**
- **Air Performance Report**
- **Attribute Revenue**
- **CE Reminders Builder**
- **Charge Professional Fee**
- **Circle of Excellence**
- **Client Search**
- **Commission Search**
- **Create Reservation**
- **Cruise Line Setup**
- **Dashboard**
- **Data Certification Report**
- **Disburse Payment To Client**
- **Disburse Payment To Vendor**
- **Find Group**
- **Find Reservation**
- **GST Payments**
- **HQ Documents**
- **Lead Dashboard**
- **Marketing Analysis**
- **MillionAir**

- **Notes Report**
- **Payment Request To Client**
- **Payment Request To Vendor**
- **Pending & Final Payment (Invoice)**
- **Receive Payment From Client**
- **Receive Payment From Vendor**
- **Reminders Dashboard**
- **Retrieve Lead Request**
- **Sales Activity**
- **Search All Cruise Inventory**
- **Search Promotion**

Additional screens and enhancements will be introduced in future releases as part of the ongoing evolution of AdvisorOS.

Screens not listed above will continue to use their current experience until they are included in a future release.

Please note: The screens available to you will depend on your **brand and user permissions**, so you may not see all of the screens included in the November 2 launch.

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5. Will the way I work change?

In most cases, your existing workflows will remain the same. While some screens may look different, the core functionality and business processes should feel familiar.

Access and Availability

6. Do I need to do anything before November 2?

No action is required prior to launch. The updated screens will become available automatically.

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7. Will my login credentials change?

No. Your current login credentials will remain the same.

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8. Will my data be affected?

No. Your existing client data, reservations, reports, settings, and historical information will remain available.

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9. Will AgentMate be unavailable during the transition?

No extended outage is expected. If any maintenance activities become necessary, they will be communicated separately.

Training and Support

10. Will training be provided?

6 live webinars will be offered to help users become familiar with the updated experience.

The webinars will take place on:

- November 2
- November 4
- November 6

Sessions will be scheduled at different times to accommodate members across the United States and Canada.

The webinar audience will be segmented by business unit and brand to address their specific needs and minimize potential misunderstandings.

CST Time	November 2026		
	Monday 2	**Wednesday 4**	**Friday 6**
10:00 AM		Cruise Specialists & The Vacation Group	TLN, TLN CA & Cruise Holidays
12:00 PM	TLN, TLN CA & Cruise Holidays		Cruise Specialists & The Vacation Group
2:00 PM	Cruise Specialists & The Vacation Group	TLN, TLN CA & Cruise Holidays	

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11. What will be covered during the webinars?

The webinars will:

- Review the updated screens.
- Highlight key changes and improvements.
- Cover the content included in this FAQ.
- Demonstrate common workflows.
- Provide an opportunity for attendees to ask questions during a live Q&A session.

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12. Are webinar recordings going to be available?

These webinars are designed as live sessions and are not currently planned to be recorded. We believe that 12 sessions during the first week after launch will provide many opportunities for user engagement, but we are open to scheduling additional sessions if demand exceeds expectations.

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13. Will on-demand training sessions be available?

At this time, no formal on-demand training program is planned. However, if members require additional assistance, requests will be reviewed and accommodated whenever possible.

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14. Where can I find documentation?

User guides and documentation will be available for the most relevant screens included in the staged launch.

These materials will be available upon request and may be used as a reference after launch.

Functionality and Features

15. Are any features being removed?

No significant functionality is being removed as part of this staged launch. The focus is on improving the user experience and modernizing the interface.

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16. Will I need to learn a completely new system?

No. **AdvisorOS** remains the same platform you use today. The enhancements focus on improving the user experience while maintaining business continuity.

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17. Can I continue using the screens I use today?

For screens included in the staged launch, users will be directed to the updated experience. Other screens will remain unchanged until future releases. Members who prefer the previous interface can use a toggle to temporarily switch back to the classic view on supported screens. **However, when navigating to a screen that uses the new technology, the system will automatically return them to the updated experience.**

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18. Will these changes impact my reports, reservations, clients, or workflows?

No. The intent is to preserve existing functionality while improving the overall experience. If specific workflow changes are introduced, they will be covered in the documentation and webinar sessions.

Feedback and Questions

19. What should I do if I have questions or encounter an issue after the launch?

Please contact the support team using the standard support channels. When reporting an issue, please provide as much detail as possible, including the steps you took and any relevant screenshots, so the team can investigate and assist you promptly.

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20. How can I provide feedback on the new experience?

Feedback is highly encouraged. Comments, suggestions, enhancement requests, and requests for screen or workflow documentation can be submitted to **advisoradoption@travelleaders.com**.

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21. Will more screens be updated in the future?

Yes. The November 2 launch represents the first phase of our ongoing platform transformation. Additional screens, enhancements, and new capabilities will be introduced over time.

Final Message

This staged launch is an important milestone in the continued evolution of **AdvisorOS**. Our goal is to provide a better user experience while maintaining the functionality and reliability you depend on every day.

We encourage you to attend one of the scheduled webinars, explore the available documentation, and share your feedback as you begin using the updated experience. Your input will help shape future enhancements as we continue investing in the platform and supporting your success.