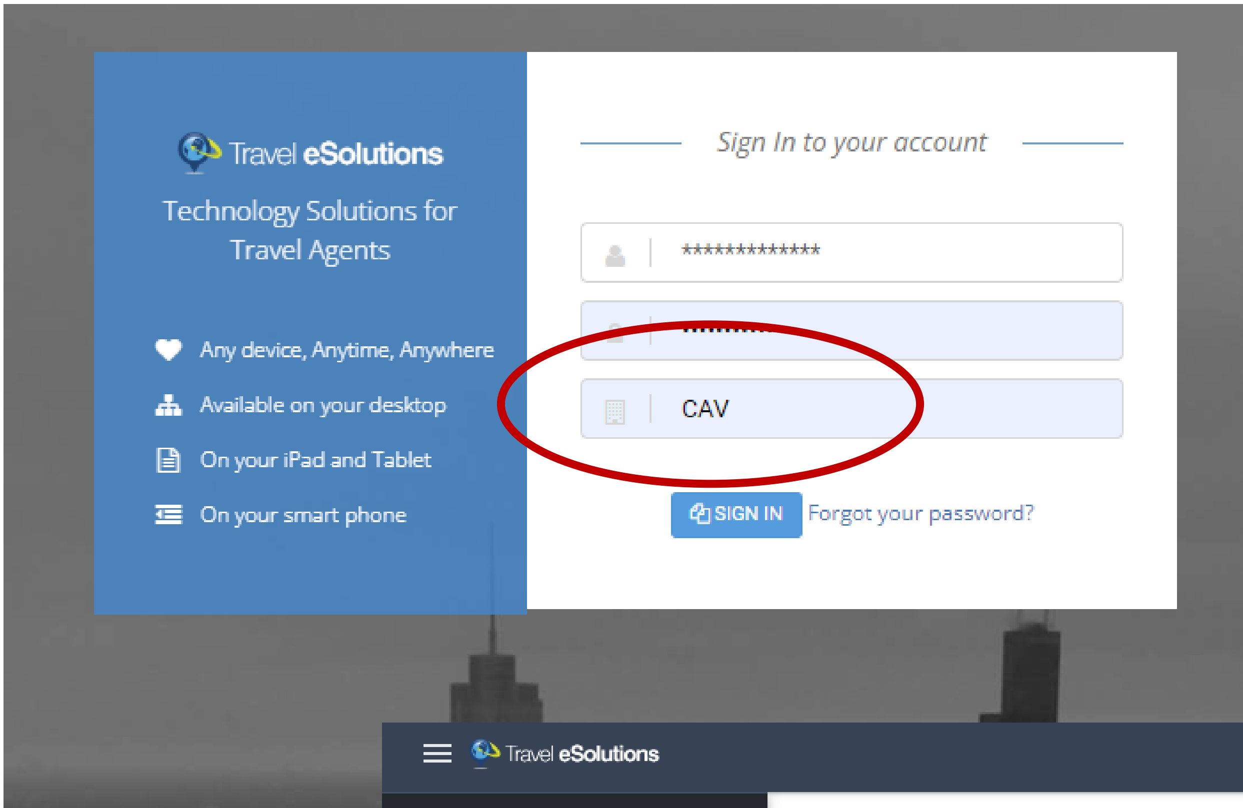
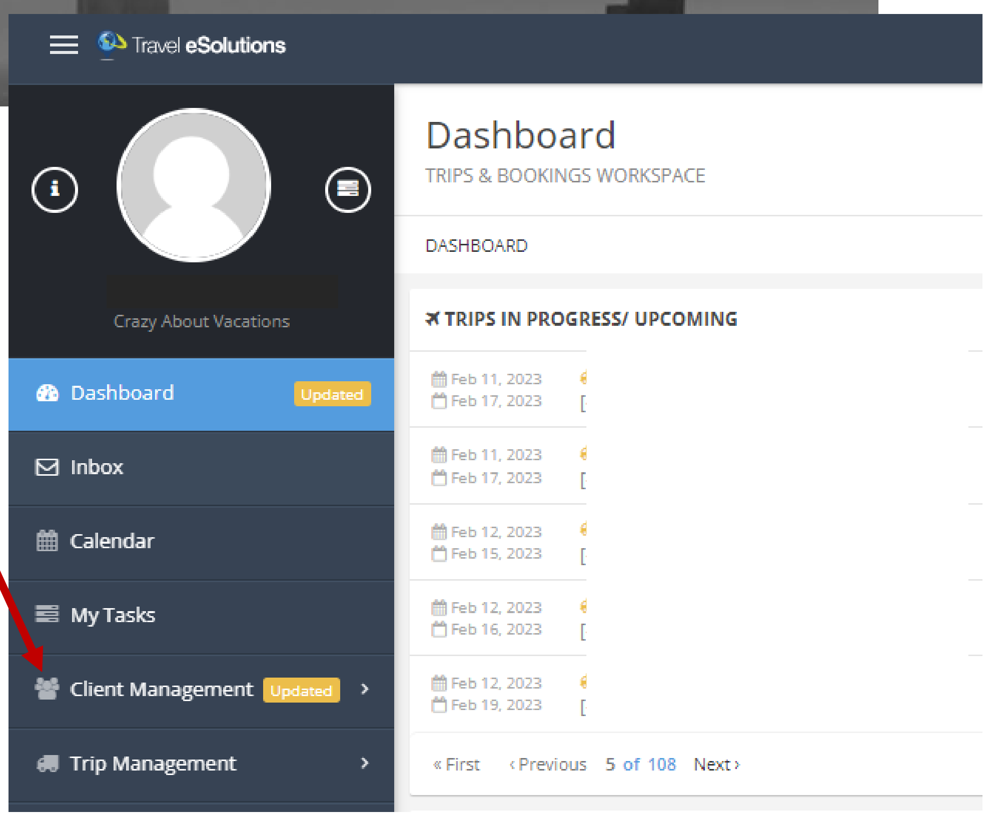
USING TESS

Sign into Tess: https://travelesolutions.com/app/login
Remember that CAV is always

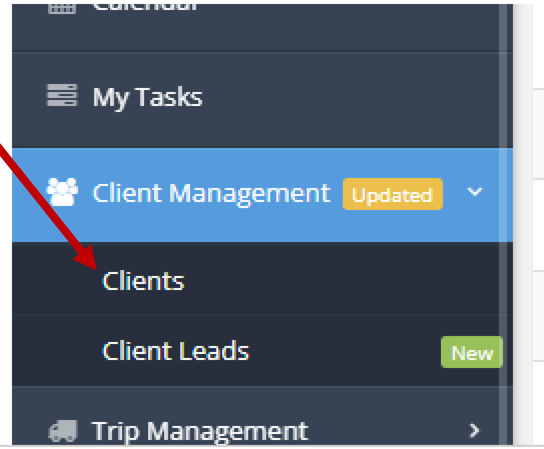


Next you will click "Client Management" in the tool bar on the right.

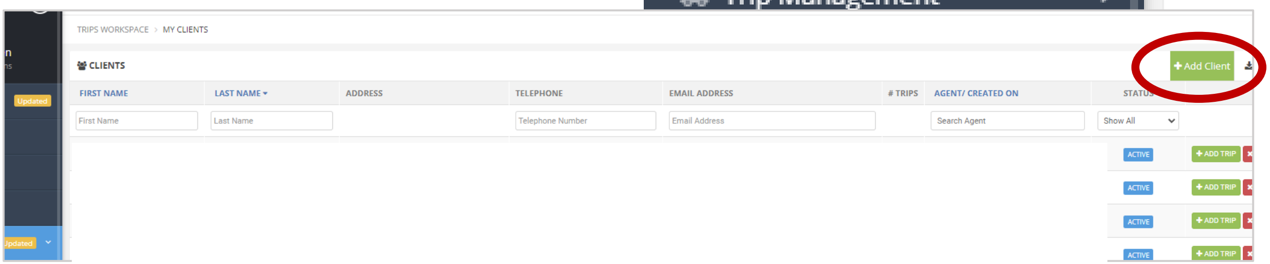


CRAZYAboutVacations.com

Now under “Client Management” click “Clients”

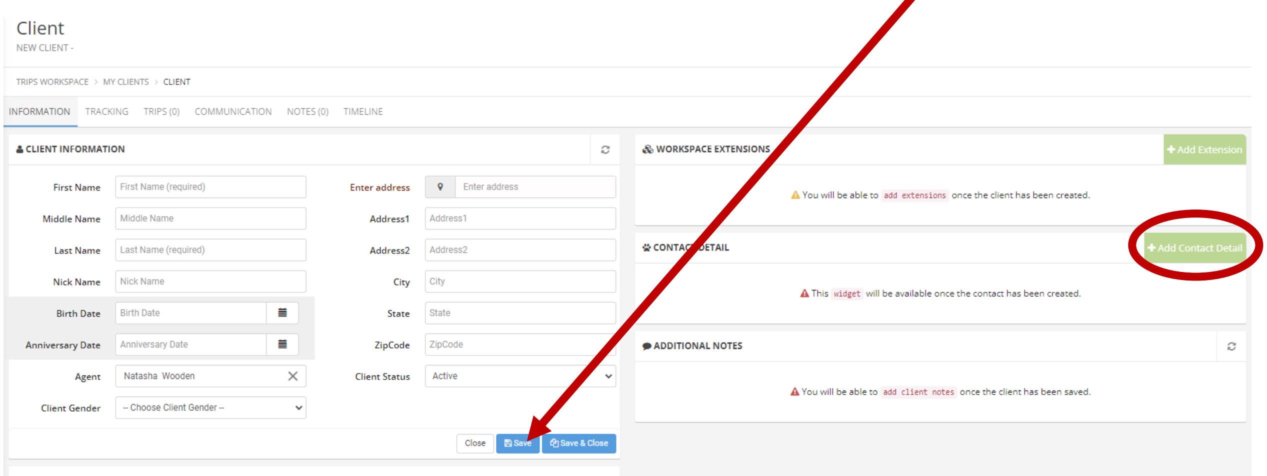


Once the new screen opens up with your clients you will now click the green box that says “Add Client”. See red circle.

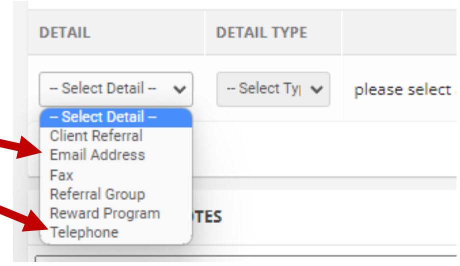


Now fill out your new clients First Name, Last Name, Address, City, State, and Zip Code… or all that you have of those fields. Now click the blue “Save” box.

Once finished click the green box labeled “Add Contact Detail”. See red circle.



In the “Add Contact Detail” box you will add their phone number and email address.

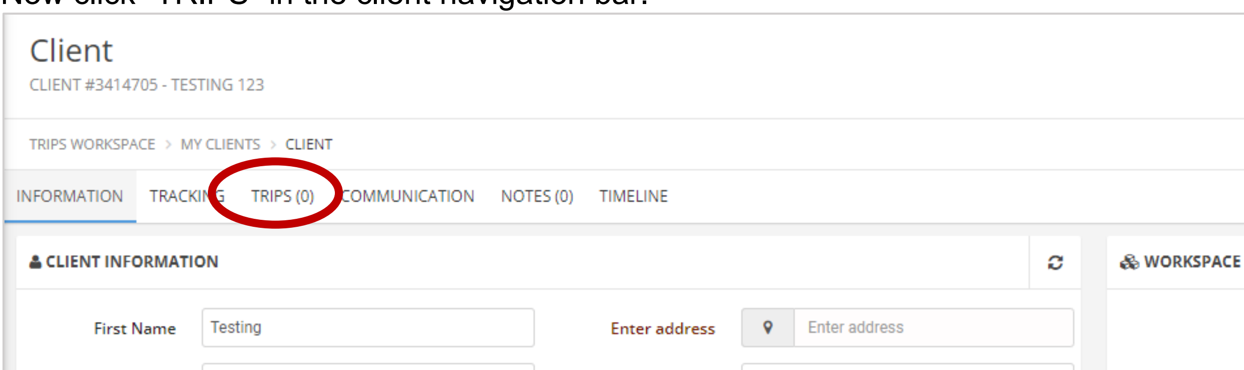


Under “Additional Notes” you will include:

- Their reward numbers for cruisers, known traveler numbers, and so on.
- Birthdates and especially for kids so you can quote them without asking on their next vacation.
- Kids names - when my clients call I ask how their kids are doing by name, that is so meaningful to them.
- Allergies
- Notes from previous vacations such as if they like late or early dining.
- and anything else that will assist you in booking them at a later date.

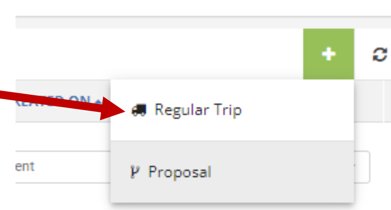
BE SURE TO CLICK THE GREEN “SAVE” BOX WHEN YOU ARE DONE.

Now click “TRIPS” in the client navigation bar.

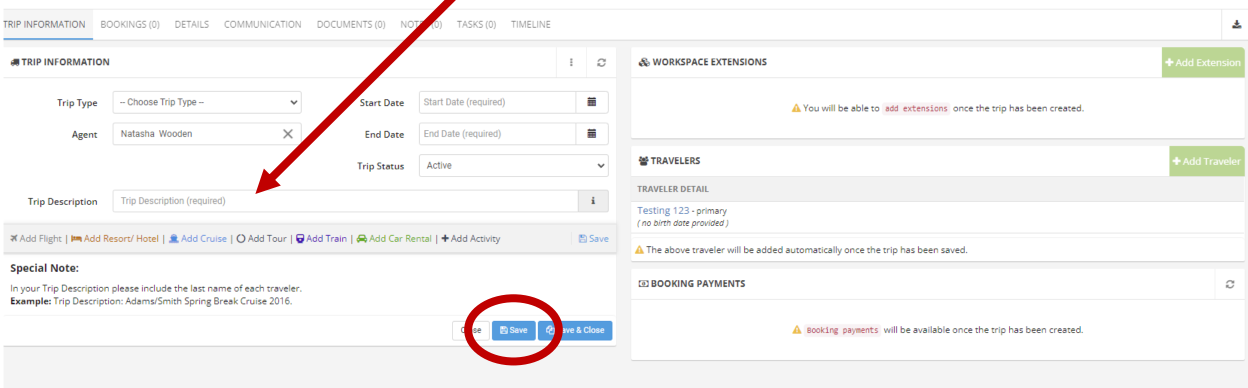


Click the  box.

Then select “Regular Trip”.



In the Trip Information page fill in each box. Under “Trip Description” please type: Client Last Name, Client First Name – Supplier or Supplier Acronym and Month/Year. Ex. Doe, John – RCCL 6/2024

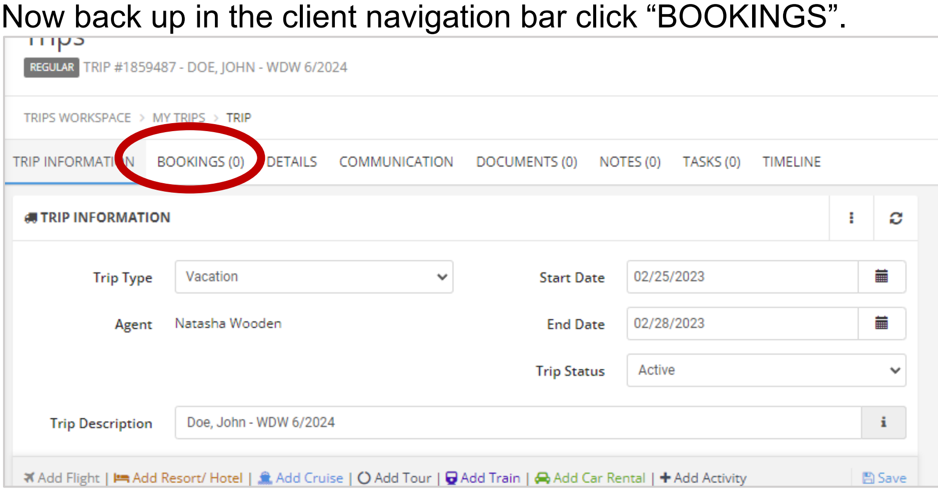


Some Acronyms:
WDW – Walt Disney World
DL – Disneyland
UFL – Universal Florida
RCCL – Royal Caribbean Cruise Line
NCL – Norwegian Cruise Line
PCL – Princess Cruise Line
DCL – Disney Cruise Line
SEA – SeaWorld
CCL – Carnival Cruise Line

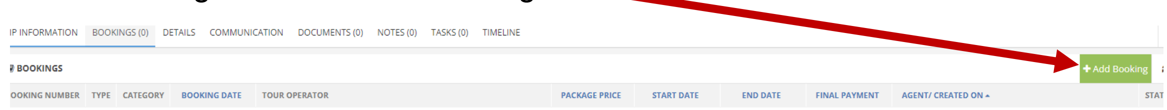
If they are traveling ROTW (rest of the world) then list the location such as Italy, or US Travel, or ROTW… whatever works for you.

Now click the blue “Save” box. See red circle above.

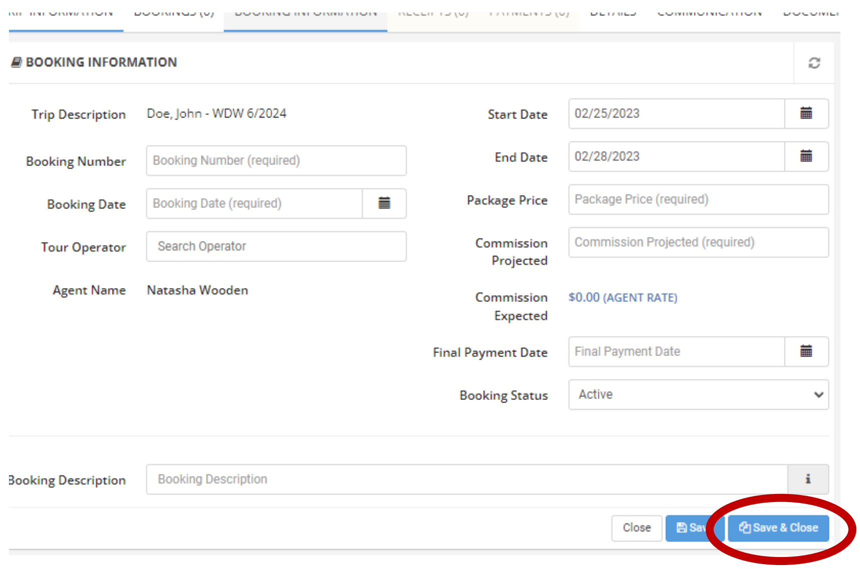
Now back up in the client navigation bar click “BOOKINGS”.



Now click the green box “Add Booking”.



Fill out all of the boxes. The commission should be the commission the supplier is paying vs what your commission is with the agency. It will then generate what your portion of the commission will be for your records.



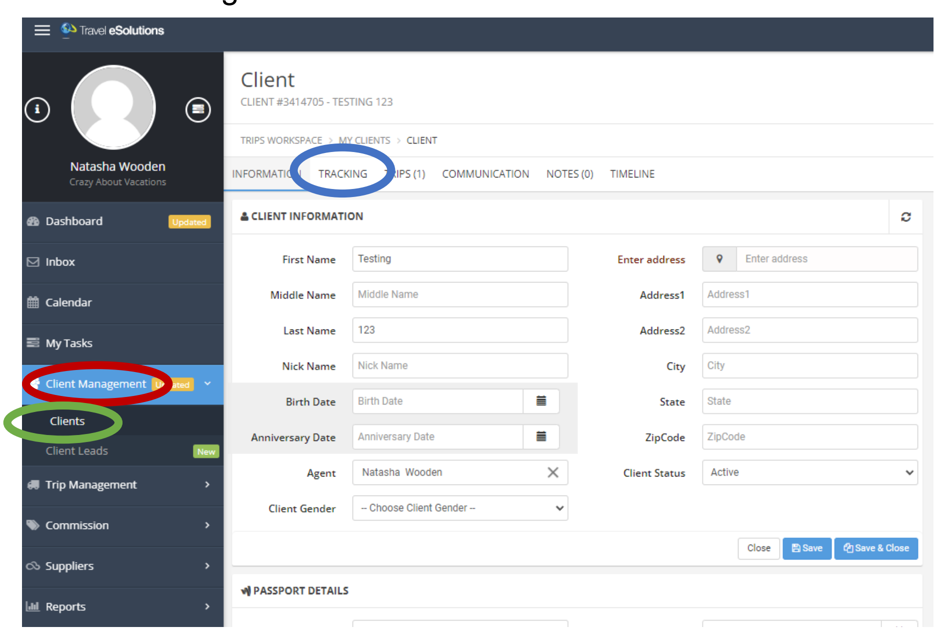
Tour Operator is the supplier such as Disney Parks, Carnival Cruise Line and such.

As far as booking description. We usually leave that blank unless they are have add ons or multiple vacations. Multiple vacations such as families that split their vacation between Universal and Disney, or a Disney Cruise and Disney World. Add ons such as Viator excursions, or vacation insurance.

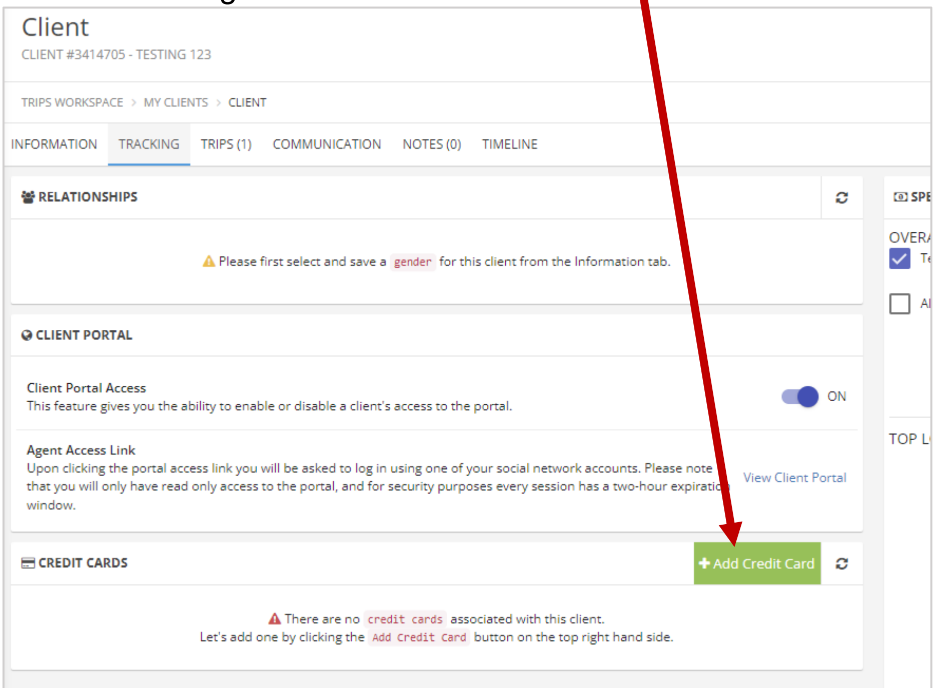
Once it is all filled out click the blue “Save & Close” button. See red circle above.

Adding Payment Information into TESS

Log into Tess
Click on “Client Management” in the navigation bar to the right of your page. See red circle below.
Click on “Client Leads”. See green circle below.
Now click “Tracking”. See blue circle below.

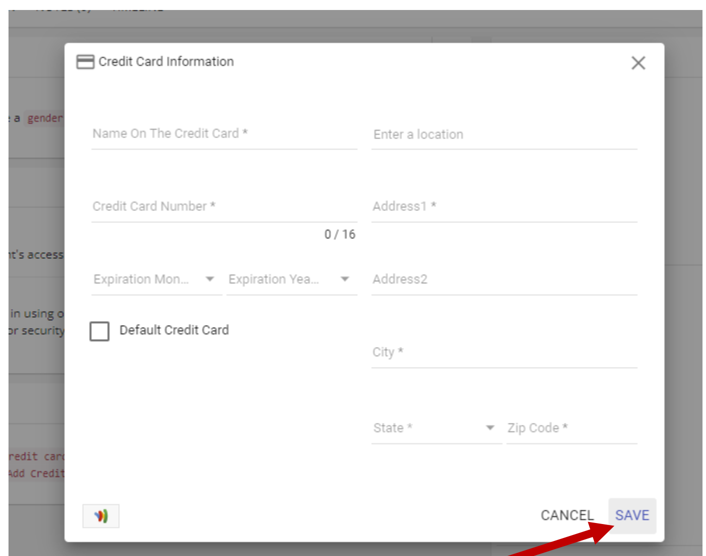


Now select the green box “Add Credit Card”.

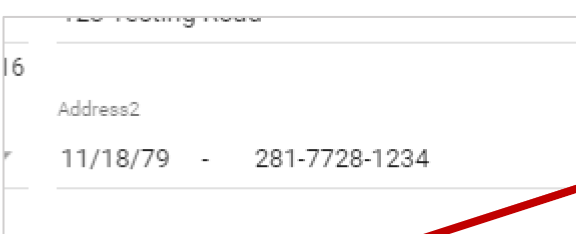


Fill in each field with the proper information.

There is no space for their security code which is usually found on the back of most cards. This is due to keeping your client’s information secure. Some agents choose to put the digits in the “Address2” line but we do not recommend it.



In the “Address2” line we recommend inputting your client phone number and anything else suppliers request upon payment. Just divide with a space bar like:



Then click the “SAVE” button and your clients payment info is saved. You can add up to 99 cards.

Tips and more

- Royal Caribbean reuses booking confirmation numbers so if you cannot use a booking number please place -1 at the end of the booking number.
- If you are booking a Disney park ticket only please be sure to mark the travel dates for the date of booking! They release commissions for park ticket only bookings on the next payment cycle.
- If you are booking a room only at Disney please be sure to not use the booking number but instead the resort confirmation.
- If you are unsure of the commission please refer to our commissions cheat sheet in the binder training and if you are still unsure please mark the commission as 1 dollar.
- You have 48 hours to log your bookings into TESS once a client books! Do not forget because if you do, you will not get paid!
- If you do not receive a commission, you have 60 days to notify us or forfeit the commission. We purge every 60 days and cannot pull up past bookings in most cases!
- To calculate a commission by calculator you would take the amount of sale BEFORE taxes and then multiply by commission %. For example if our ticket only booking is $500.00 BEFORE taxes and we purchase BASE tickets which get a 8% commission payout, then we would type 500.00 x's 8% = $40.00 commission. That $40.00 is what we would put in TESS.

Entering Personal Travel for Yourself

- Add yourself as a client in TESS
- Enter your booking information just like your clients
- Visit our website at www.crazyaboutvacationsagentsonly.com and under the "SOS" tab submit a ticket for 95% commission request on personal travel. You can do this one vacation a year.