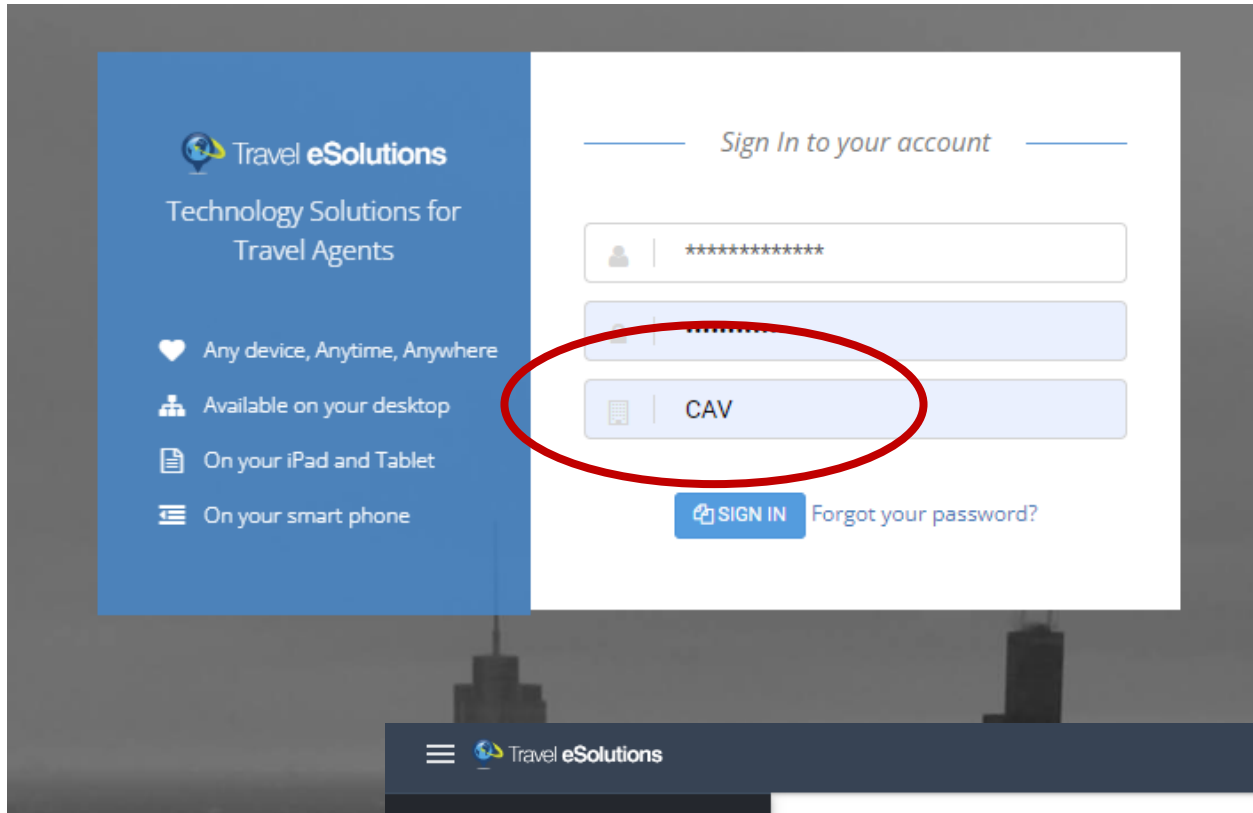


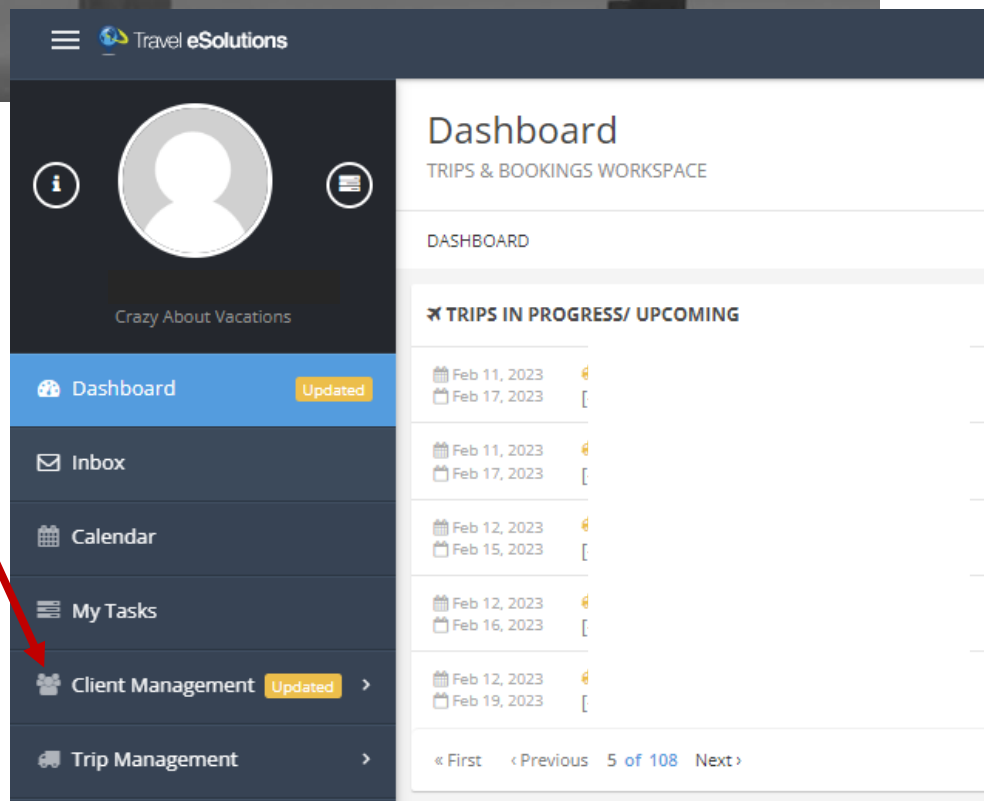
USING TESS

Sign into Tess: <https://travelesolutions.com/app/login>

Remember that CAV is always

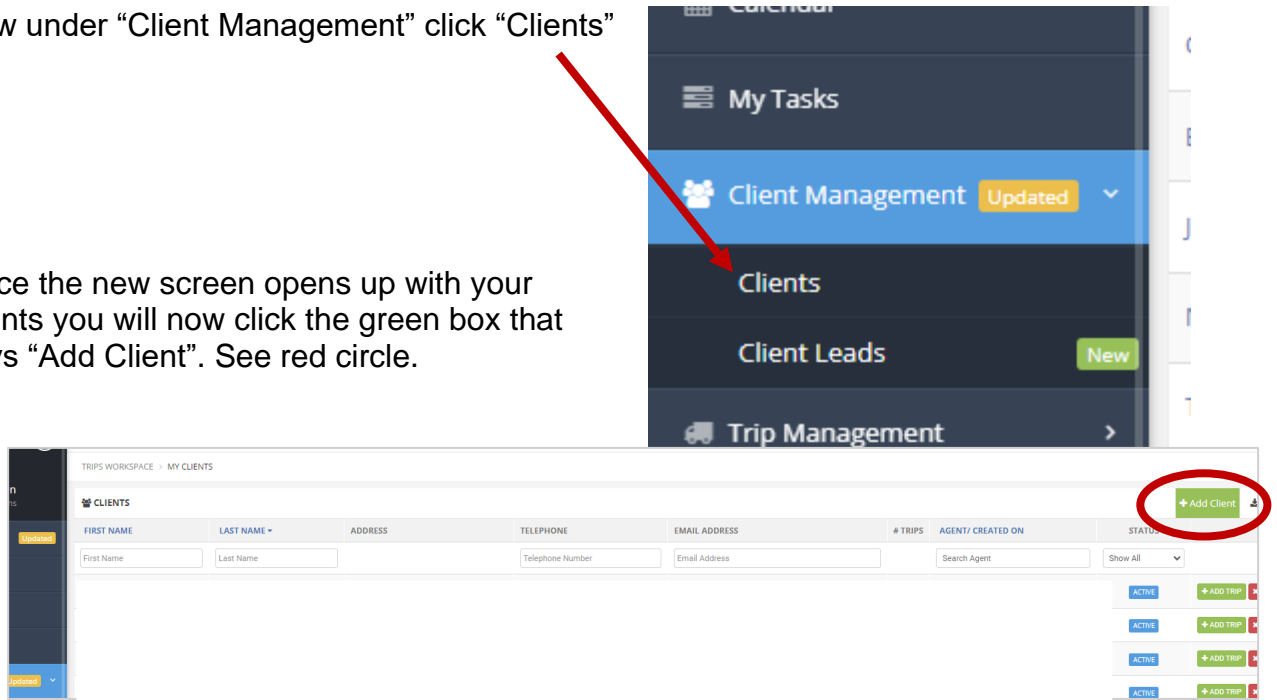


Next you will click
“Client Management” in
the tool bar on the right.



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.

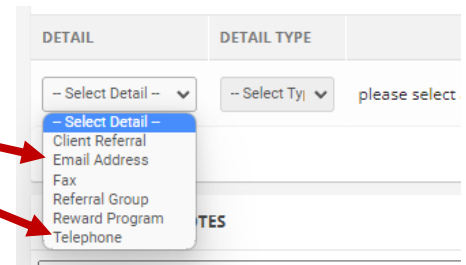


Now fill out your new clients First Name, Last Name, Address, City, State, and Zip Code... or all that you have of those fields. Now click the blue “Save” box.

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

This image shows the 'NEW CLIENT' form. The form is divided into several sections. The 'CLIENT INFORMATION' section on the left contains fields for 'First Name' (required), 'Middle Name', 'Last Name' (required), 'Nick Name', 'Birth Date', 'Anniversary Date', 'Agent' (set to 'Natasha Wooden'), and 'Client Gender' (set to '- Choose Client Gender -'). The 'Enter address' section on the right contains fields for 'Address1', 'Address2', 'City', 'State', and 'ZipCode'. Below these is a 'Client Status' dropdown menu set to 'Active'. At the bottom of this section are 'Close', 'Save', and 'Save & Close' buttons. A red arrow points from the text 'click the blue "Save" box' to the 'Save' button. The 'WORKSPACE EXTENSIONS' section on the right contains a green '+ Add Extension' button. Below it is a section for 'CONTACT DETAIL' with a green '+ Add Contact Detail' button circled in red. At the bottom of this section is an 'ADDITIONAL NOTES' section with a red arrow pointing to it from the text 'click the green box labeled "Add Contact Detail"'. The form also includes tabs for 'INFORMATION', 'TRACKING', 'TRIPS (0)', 'COMMUNICATION', 'NOTES (0)', and 'TIMELINE'.

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



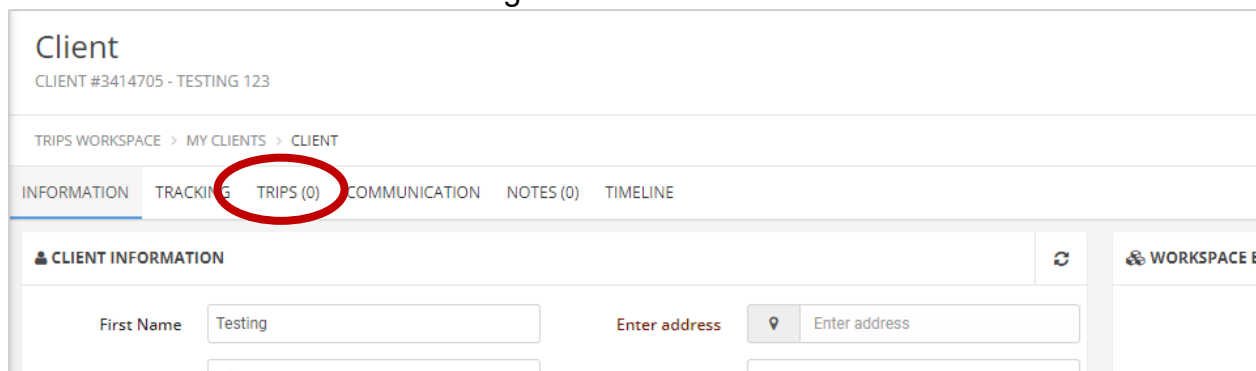
A screenshot of a web application interface showing a dropdown menu for adding contact details. The menu is open, displaying options: Client Referral, Email Address, Fax, Referral Group, Reward Program, and Telephone. Red arrows point from the text above to the 'Email Address' and 'Telephone' options.

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.

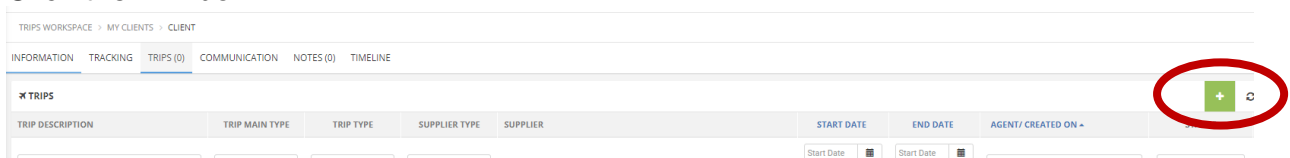
BE SURE TO CLICK THE GREEN “SAVE” BOX WHEN YOU ARE DONE.

Now click “TRIPS” in the client navigation bar.



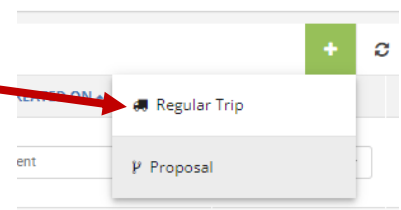
A screenshot of a web application interface showing the client navigation bar. The 'TRIPS' tab is highlighted with a red circle. The interface includes fields for 'First Name' (Testing) and 'Enter address'.

Click the  box.



A screenshot of a web application interface showing the 'TRIPS' section. A green plus icon is highlighted with a red circle. The interface includes a table with columns: TRIP DESCRIPTION, TRIP MAIN TYPE, TRIP TYPE, SUPPLIER TYPE, SUPPLIER, START DATE, END DATE, and AGENT/ CREATED ON.

Then select “Regular Trip”.



A screenshot of a web application interface showing a dropdown menu for selecting a trip type. The 'Regular Trip' option is highlighted with a red arrow. The dropdown also shows a 'Proposal' option.

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

The screenshot shows the 'TRIP INFORMATION' page. The 'Trip Type' is set to 'Vacation', 'Agent' is 'Natasha Wooden', 'Start Date' is '02/25/2023', 'End Date' is '02/28/2023', and 'Trip Status' is 'Active'. The 'Trip Description' field is empty. A red arrow points to this field. At the bottom right, there is a blue 'Save' button circled in red.

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”.

The screenshot shows the client navigation bar with 'BOOKINGS' highlighted in a red circle. The 'TRIP INFORMATION' page is still visible in the background.

Now click the green box “Add Booking”.

The screenshot shows the 'BOOKINGS' page. A red arrow points to the green 'Add Booking' button at the bottom right.

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 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.

BOOKING INFORMATION

Trip Description	Doe, John - WDW 6/2024	Start Date	02/25/2023
Booking Number	Booking Number (required)	End Date	02/28/2023
Booking Date	Booking Date (required)	Package Price	Package Price (required)
Tour Operator	Search Operator	Commission Projected	Commission Projected (required)
Agent Name	Natasha Wooden	Commission Expected	\$0.00 (AGENT RATE)
		Final Payment Date	Final Payment Date
		Booking Status	Active

Booking Description: Booking Description

Buttons: Close, Save, **Save & Close**

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.

Client Management

Client Leads

Tracking

Client Information

First Name: Testing

Middle Name: Middle Name

Last Name: 123

Nick Name: Nick Name

Birth Date: Birth Date

Anniversary Date: Anniversary Date

Agent: Natasha Wooden

Client Gender: -- Choose Client Gender --

Enter address: Enter address

Address1: Address1

Address2: Address2

City: City

State: State

ZipCode: ZipCode

Client Status: Active

Buttons: Close, Save, **Save & Close**

Now select the green box “Add Credit Card”.

The screenshot shows the 'Client' page for 'CLIENT #3414705 - TESTING 123'. The 'TRACKING' tab is selected. Under the 'CREDIT CARDS' section, there is a green button labeled '+ Add Credit Card' with a circular refresh icon to its right. A red arrow points from the text above to this button. Other sections include 'RELATIONSHIPS', 'CLIENT PORTAL', and 'Agent Access Link'.

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:

The screenshot shows a form field labeled 'Address2' with the value '11/18/79 - 281-7728-1234' entered. A red arrow points from the 'SAVE' button in the adjacent form to this field.

The 'Credit Card Information' modal form contains the following fields: 'Name On The Credit Card *', 'Enter a location', 'Credit Card Number *' (with a '0 / 16' character count), 'Address1 *', 'Expiration Mon...' and 'Expiration Yea...' dropdowns, 'Address2', 'City *', 'State *' and 'Zip Code *' dropdowns. There is a checkbox for 'Default Credit Card'. At the bottom right are 'CANCEL' and 'SAVE' buttons. A red arrow points from the 'SAVE' button to the 'Address2' field in the previous form.

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 $500.00 \times 8\% = \$40.00$ 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.