*Wishlist Item:* After an agent clicks “Save”, there should be a message that says “Do you want to be reminded to submit your commission?” and then on the client’s departure date, Travel+ CRM emails the agent with a message that says “[Itinerary] is complete! Log in and confirm your saved commission information is accurate, then submit it within 45 days.”

When an agent enters in a commission for an Itinerary and clicks “Save” they are just storing the details of the commission for now. They can’t actually submit it to admin until the client has completed their travel. So what we’re asking is if they save a commission, could there be a message that pop’s up and asks them if they would like an email reminder to submit their commission on the day of their clients departure or last day of vacation. If they choose yes then the CRM will send them an email on the last day of their clients vacation reminding them to submit their commission through the CRM to the admin.

*Wishlist Item:* There should be a “Client’s Itinerary” section. The CRM would use the number of days previously mentioned (or the agent can add how many days it is), and in each option they enter accommodations, transportation [with the option to add multiple], activity [with the option to add multiple] with times and locations and a reservation/suggestion toggle, dining [with the option to add multiple] with times and locations and a reservation/suggestion toggle. There should be a spot for agent notes and photos for each day. The agent should be able to email this to the client and to edit it. (Some agents might want this at the “Quote” level.)

Don’t worry about this one for now.

*Wishlist Item:* Itinerary dashboard should have an option to see and sort by travel dates and/or last day of travel. Agents can filter their Itinerary and quote dashboard by travel start dates and ending dates, supplier and client.

* *Wishlist Item:* Client Communication Dashboard - We can put this on hold
  1. Agents want to be able to email their clients in advance and en-mass. They should be able to draft emails with plenty of formatting options (upload photos too).

○ They should be able to pick the subject line

○ There should be options to select clients and from there, select an itinerary and choose a # of days in advance before the travel date of the itinerary OR after the end date of the itinerary. It should send the email automatically on that set date.

○ There should also be a “No itinerary” option where agents instead pick a specific date (such as birthdays, holidays, newsletters)

○ Agents should be able to send the same email to multiple parties and set them up in advance like that.

○ The email should remain in the dashboard as an option until the agent deletes it, in case they want to send the same email to multiple clients.

○ If an agent deletes an itinerary, it should automatically cancel any affiliated emails

* (Desktop) clicking the Travel+ CRM logo brings up a page with a lot of information that won’t make any sense to our agents. I don’t know what this is…
* There needs to be a section for tutorials. You can find these tutorials on the old CRM. Just bring them over to a new page.
* ● *Wishlist Item:* “Brand” tab

○ The agent should be able to upload their logo, update their email address, update their business name. I think this stuff is in their agency profile already?

○ Ideally they should also be able to choose the font and colors that appear on their emails to clients

Travel Quotes:

When I click on create a new quote it asks for travel details as if it’s already booked.

Under “Traveler” for age i put 42 and it changed it to 39.

I’m just confused on where we put an actual quote together to send to the client to choose an option?

Where can I add multiple options for the client?

Will we be able to share a link to the resorts? Or add pictures of the room/destination? On the list of quotes can we make the whole thing clickable instead of clicking on the pen to edit? Same for itineraries? From the Itinerary or Quote dashboard, make each item of an Itinerary or Quote clickable to open it including the Name, Client Name etc and not just the pencil edit button.

If possible, there should be a “duplicate” option under “Actions”. That way agents who need to make multiple quotes can quickly make adjustments while keeping the original one, or who are quoting multiple clients with the same offering. Give agents a way to duplicate a Quote or Itinerary incase they need to make multiple of the same one with minor changes.

Could we add a link to the FAQ for commissions here? We have an FAQ page for commissions: https://mstagents.com/commissions/#1671649283411-2ed93f02-0a3a