* Login screen for agents should say “Welcome Agents!” instead of “Let’s Get Started..” (Needs to be done)
* On the login screen there should be a “I Agree to the Agent Agreement” line with a mandatory checkbox. (The words “Agent Agreement” should link to a page with the entire agreement on it).
* There’s no registration fields in the login screen( Document with registration information was sent over).
* Once logged-in, how does the agent view their created profile? Right now if you click on the photo in the top right (Agents should be able to upload a profile photo. Their profile menu should show options including Personal Profile (registration details), their Agency Profile, and their Tax Form).
* It says “Good Morning, James!” but it isn’t morning (this should switch between “Good Morning”, “Good Afternoon” and “Good Evening”

W-9 (This was tested on the desktop)

* 1. Signature field is tiny and there’s no way to backspace

○ The dropdown blocks the number so I can’t read what number I put in. Do we need drop down?

○ Can we include a spot for informing the agents what they’re doing with this? (Add an area to the W9 that helps the agents understand what they are filling out).

○ I revisited the W-9 later and it does not show my pre-submitted W-9. Ideally, post submission, it should have a message that says “W-9 submitted on [date]” and have the options to view (require them to re-enter their password) or change”

○ We might want to add a W8-BEN option. Maybe when an agent registers, if they select that they are “not a US resident”, their profile populates a W8-BEN instead of a W-9. (I sent this document over. Any agent who registers with a country outside of the USA should be given a W8-BEN instead of a W-9).

* “My Client” (tested on desktop)
  1. “My Client” should be “My Clients”

○ Clients don’t delete *or* give a message that they are deleted

○ There’s nothing populating in “Member Since” or “Itinerary”(W

○ “Age” shows a birthday field. It should say “Birthday”

○ I left some fields blank and it would not let me submit *and did not give me any explanation or warning.* Ideally we could leave some things blank if we don’t know yet, minimally it should warn. (Not all fields are required for quotes or itineraries)

○ AFTER SUBMITTING, I added a new member and when trying to add their birthday, after I put in a month and day, when I try to add the year it erases everything. Or it will erase everything if I put the year, then the day, then try to add the month.

○ The calendar function also won’t work when adding a new family member post submitting.

○ To get around this issue, I tried to “submit” with my third family member. When I went to edit the family again, all the members are now gone.

○ We don’t really need the calendar in clients to go into the future (at least not by multiple years)

○ I put “555-555-5555” as the phone and the error message said “Please enter a number”. It accepted it without dashes. Clarify the error message to say “Please enter a number without any dashes or symbols (let’s have an example for this field that shows how to enter: Country Code then Phone Number 1-435-495-0392)

* “Dashboards” (tested on desktop)
* “Add Travel Quote” (tested on desktop)
  1. Travel quotes don’t delete *or* give a message that they are deleted

○ “travel\_Start Date” should say “Travel Start Date”

○ “Deposit Paid” doesn’t make sense at this stage. It should say “Deposit” or “Deposit Required”

○ After I’ve filled out “Quote header fields” there’s no clear direction on what to do next. Include either a button or text at the bottom that says to move on to the next tab.

○ In “Traveler”, it would be nice if you could select an existing member of the client family. We’ve already put in their date of birth, I’d like to avoid doing that twice.

○ It would be cool if there was a draft function(autosave)

○ “Traveler Known Traveler Number” should have an explanation icon ○ Why is “Traveler Room Number” a box?

○ Ground Transportation should have an icon (a car)

○ (Using a Cruise) “Cruise Stateroom Type” should not be numbers. It should be a type-in box.

■ The first option should be “Cruise Line”

○ In “Hotel”, you won’t know the “Hotel Room Number”. Remove.

○ In “Flight”, there is only information for one flight. Include a button to add another flight. (Most agents will book a round trip flight with 2 flights. Some will book multi-destination with 3+ flights.)

○ Include a button to add more “Add-Ons”. There will probably be a lot for some clients.

○ Client Record: “Selectclient\_type” and “Selectclient\_gender” need to be fixed to

“Client Type” and “Client Gender”

○ Include a button for “Same as lead traveler” that auto-fills this with the information the agent put in earlier under “Traveler”

○ What does the email action do? It doesn’t appear to email the client. Does it email the agent? Can we get a response from the site to know it sent?(There should be 2 email action buttons. One to send a test email to the agent using their agency email address and then the 2nd one that sends the email to the client. Both should give a pop-up notice when the email is sent)

○ (Using Theme Park) “Ticket” should be a different icon. Something related to theme parks(something like this 🎟️).

■ Include a button to add more “Tickets”. Most commonly, agents book one type of ticket with two different prices (adult and child). Frequently, agents book multiple types of tickets with different ticket names and prices

■ Include ticket type with options: Adult, Child, (maybe “other” that can be typed in?)

■ Ticket Total Price should be below Quantity. It should be offset below all the additional tickets agents add.

■ There should still be a flight option for theme park (add flight tab for Theme Park travel)

■ There should definitely be a flight option for all-inclusive (add flight tab for All Inclusive travel).

○ 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.

○ When I click “Show Payment Information” it says “Enter Otp And See Payment Information”. (I have not submitted any payment information yet). Can we change this to “Payment Keyphrase”?

■ If so, when the incorrect OTP is entered, change that message to say “Payment Keyphrase”

■ When I click “Cancel” it says “Error/ No avatar found for the provided username.” Change this to instructions on how to find the Otp/Payment Key”

■ When I click “Delete Payment Information”, change the auto message from “Payment Deleted…..” to “Payment Information [or info] Deleted….” ●

Travel Itineraries (tested on desktop)

○ Travel itineraries don’t delete when it says they are deleted

○ In “Paper Works and Documents”, I am unable to upload. I click it and it says “Failed to create paperwork”

○ To make this area more accessible, agents should be able to re-download paperwork stored here (give agents an option to download files they uploaded).

○ Agents should have a button to email documents to their clients from this section (Add an email composer to this page so that agents can send a message with attached documents that they have uploaded. They should be able to choose which ones they send).

■ Testing a NEW itinerary. In the “Payments” section, there is already an example payment

■ When I click “Create a New Payment”, nothing happens after filling out the form with all information

● I moved to the “Paper Works and Documents” tab, then returned to “Payments”, and now it’s showing the payment. It should have shown up automatically the first time (When a Payment is added/submitted the page should reload automatically to show what was added).

■ In “Add Payment Notification”, I can pick reminder Time but have no indication what the time zone is. If this is set up in the profile, there should be an option here to “change time zone” with a link to the profile section (add a timezone option to this form).

■ After putting in Payment Notification information, when I click “Submit”, it says “Failed to create payment” and the loading circle does not go away

○ Commission Section

■ There should be an option to add additional commissions within the same itinerary, including all the details from “Reservation Number” down. Ideally mirrored after [MSTAgents.com/Commission](http://mstagents.com/Commission). This is crucial for agents who book multiple products in one itinerary, which is most agents’ situations.

■ I typed “Walt Disney World” in supplier, hit enter, and got the following error messages in “Gross Commission” and “Agent Commission”:

gross\_commission must be a `number` type, but the final value was: `NaN` (cast from the value `""`).and agent\_commission must be a `number` type, but the final value was: `NaN` (cast from the value `""`).. Apparently “Enter” will save or submit the form, which is very premature.

■ The Supplier drop-down only shows 3 options. Is this going to be constantly updated? If not, it should have the most popular suppliers listed and “Other” *with a text box* allowed.

■ Agent Commission should say “(70% of Gross Commission) after. I LOVE that it automatically does the math!!

■ “Submit” and “Save” are unclear. “Save” should be on the left and include the message “Save your commission information in advance”. “Submit” should be on the right and include the message “Submit your commission request after travel is complete, within 45 days.”

■ “Today’s Date” should probably say “Submission Date”

■ When I click “Save” it says “Failed to create Commission” ■ Could we add a link to the FAQ for commissions here?

■ *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.”

○ *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.)

○ *Wishlist Item:* Itinerary dashboard should have an option to see and sort by travel dates and/or last day of travel.

* Commission (tested on desktop)
  1. Itinerary is spelled wrong throughout (“Itenary”)

○ “Save Commission” should be “Saved Commissions”

○ The line that says “Commission” should be more clear- is this Agent Commission or Gross Commission? Our agents care more about Agent Commission. We could show both lines.

○ “Save Commission” isn’t showing anything, so the attempted save commission from earlier did not work.

* *Wishlist Item:* Client Communication Dashboard
  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
* There needs to be a section for tutorials ● *Wishlist Item:* “Brand” tab

○ The agent should be able to upload their logo, update their email address, update their business name

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

Creating a New Client:

Could we change “Member” to “client name”?

Change “age” to “birthdate”, but could we make this optional instead of required?

What is the difference between “Member” and “Family name”?

When i hit submit to cerate new client it says “failed to create client” and keeps spinning

Sidebar order suggestion:

Dashboard

Clients

Quotes

Payments

Itineraries

Commissions

If possible, can the home page/dashboard include 4 boxes that show the last 2-3 of everything?

Clients, Quotes, Itineraries, Upcoming Commissions?

Or maybe once a quote is booked keeping a running track of totals?

Travel Quotes:

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

Can we change “Quote Header Fields”? “Trip Details” maybe?

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

Can we change “traveler” to “Guest Details”?

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?

Travel Itineraries:

I love that you can see the payment history and add documents Can we change “paper works” to “paper work”?

What is the “Client Record” for?

At what point do you convert a quote to an itinerary?

Commissions:

What is the “Save Commission” area for?

If you backspace a date while typing it erases everything.

I can’t “save” or “submit” a commission attached to an itinerary.

Payment Notifications:

Who gets the notification?

Is it through email or just the site?

“Failed to create payment” error pops up when trying to create a notification.

W9:

When you’re in “sun mode” you can’t see the form.

Could we have an explanation of the W9- like if you have a new address or have changed your name since joining?

Once it’s filled out will there be an update? Or have an option to “update” W9?

The Tax ID area has an up/down button and it covers the entire box you can’t see the numbers.

When you type, or use the up/down, and then click the next box you can’t see the numbers  
When you’re in “sun mode” you can’t see the form.