



SmartAgency invoice export

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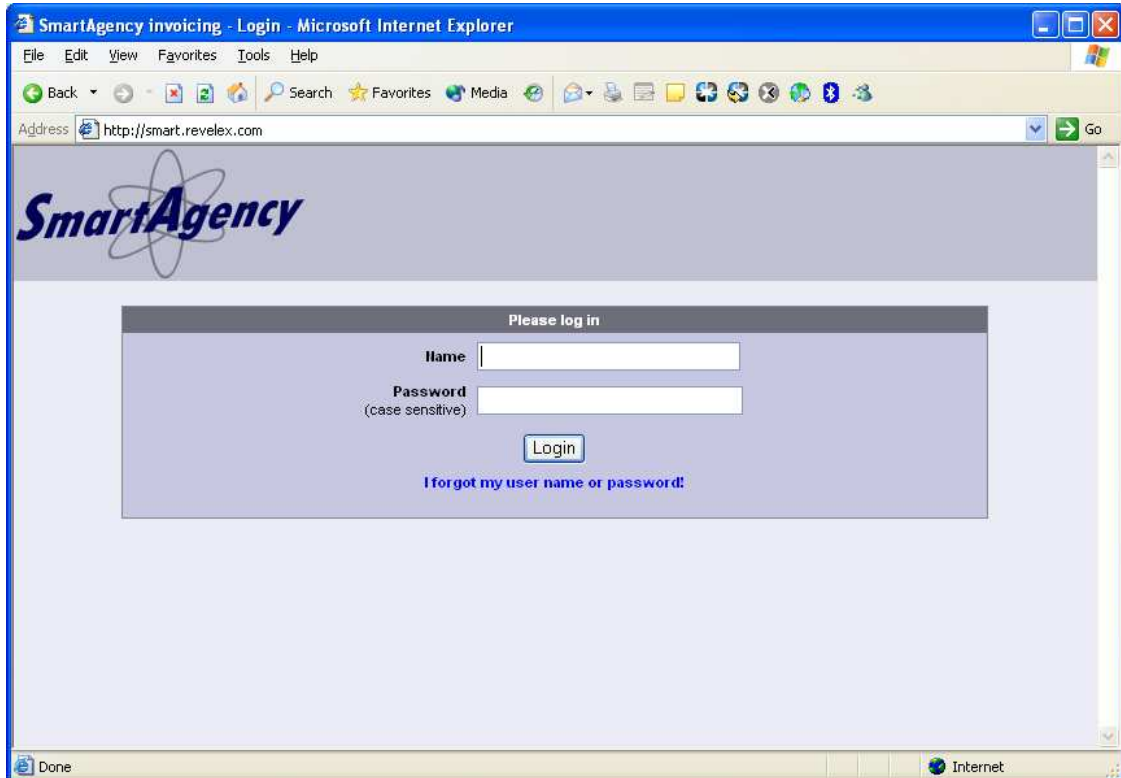
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Overview

This document describes how to export your invoices from the SmartAgency online application.

Login to SmartAgency

First you must login to SmartAgency by entering your user name and password at the login screen. If you forgotten your password or login name, click on the link “I forgot my user name or password” to have your login information emailed to you.



Select invoices to export

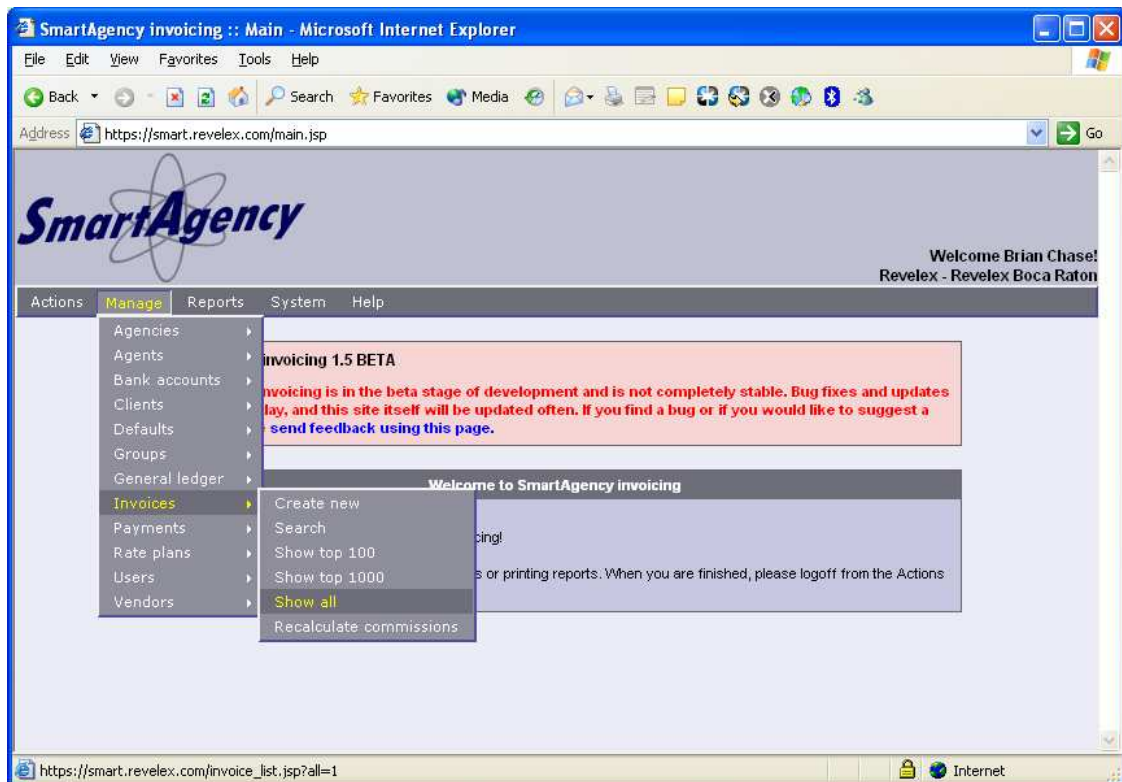
To select the invoices to export, you can either list all of your invoices or use the search invoices page to narrow down the items to export.

List all invoices

This section describes the first method, listing all of your invoices. This method is not the preferred method if your company has a large quantity of invoices in the system. We recommend using the search invoices detailed after this section.

From the menu on top, choose Manage > Invoices > Show all

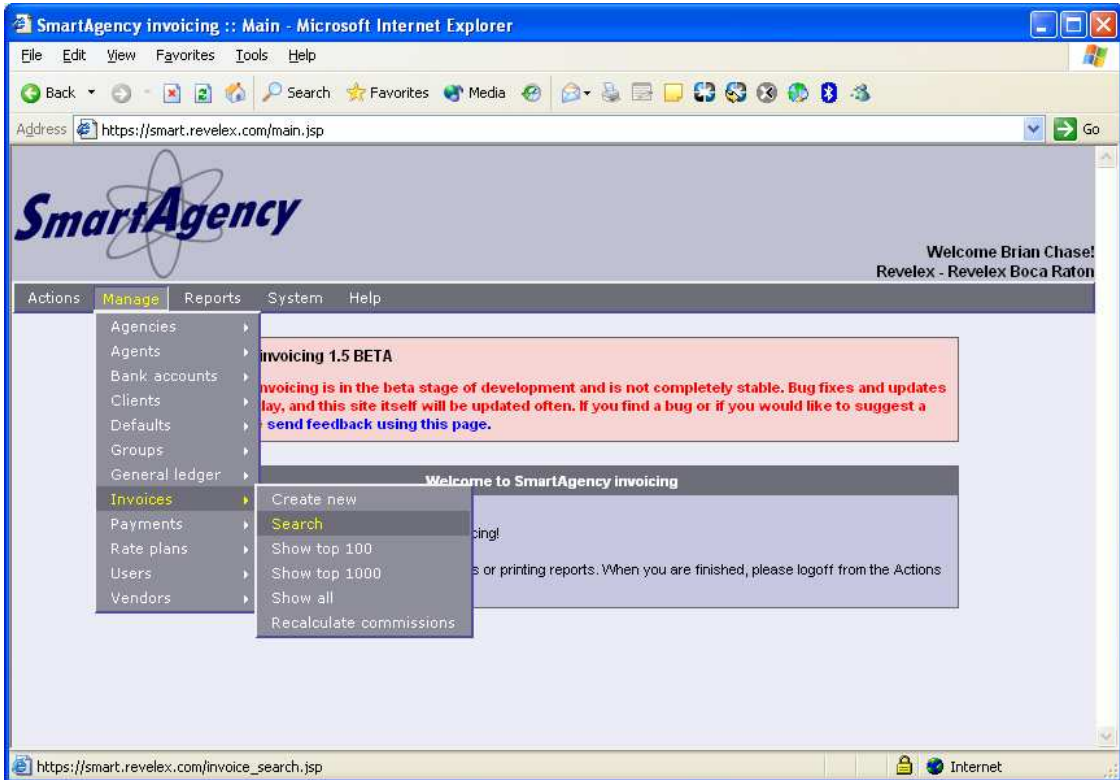
The next screen will contain a table with all invoices that belong to your agency and sub agencies. From this table you can select the invoices to export as described later.



Searching invoices

This is the preferred method for exporting invoices. This section will describe how to use the search page so that you can filter your invoices based on extensive search criteria.

From the menu on top, choose Manage > Invoices > Search



The search invoices page

This page contains ‘tabs’ (pages) such as Main, Branch, Invoice status, Invoice types, Item status, Item types, Item dates, Item cost, Groups, and Ids. You can click on any of these tabs to reveal search fields related to the tab name. You can fill out any of the fields and click on other tabs to build your search filter.

In most cases, invoice dates and item types (such as air, car, cruise) are the only search filters you will use. If you need to locate specific bookings, you can fill in fields such as confirmation numbers, agent names, client names, etc.

The main page

The Main page allows you to specify one of the most important filters, the invoice date.

SmartAgency invoicing :: Manage :: Invoices :: Search - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media

Address https://smart.revelex.com/invoice_search.jsp Go

SmartAgency

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Actions Manage Reports System Help

Search for Invoices
(Search the database for invoices that match the selected parameters below.)

Select Parameters Below :

Main Branch Invoice status Invoice types Item status Item types Item dates Item info Item cost Groups Ids

Invoice Number

Invoicee Name Select

Agent Name Select

Invoice Date ignore and
(Enter dates like: 12/20/2004, or 12202004)

Invoice Last Modified Date ignore and
(Enter dates like: 12/20/2004, or 12202004)

Agent Notes

Client Notes

Limit result count

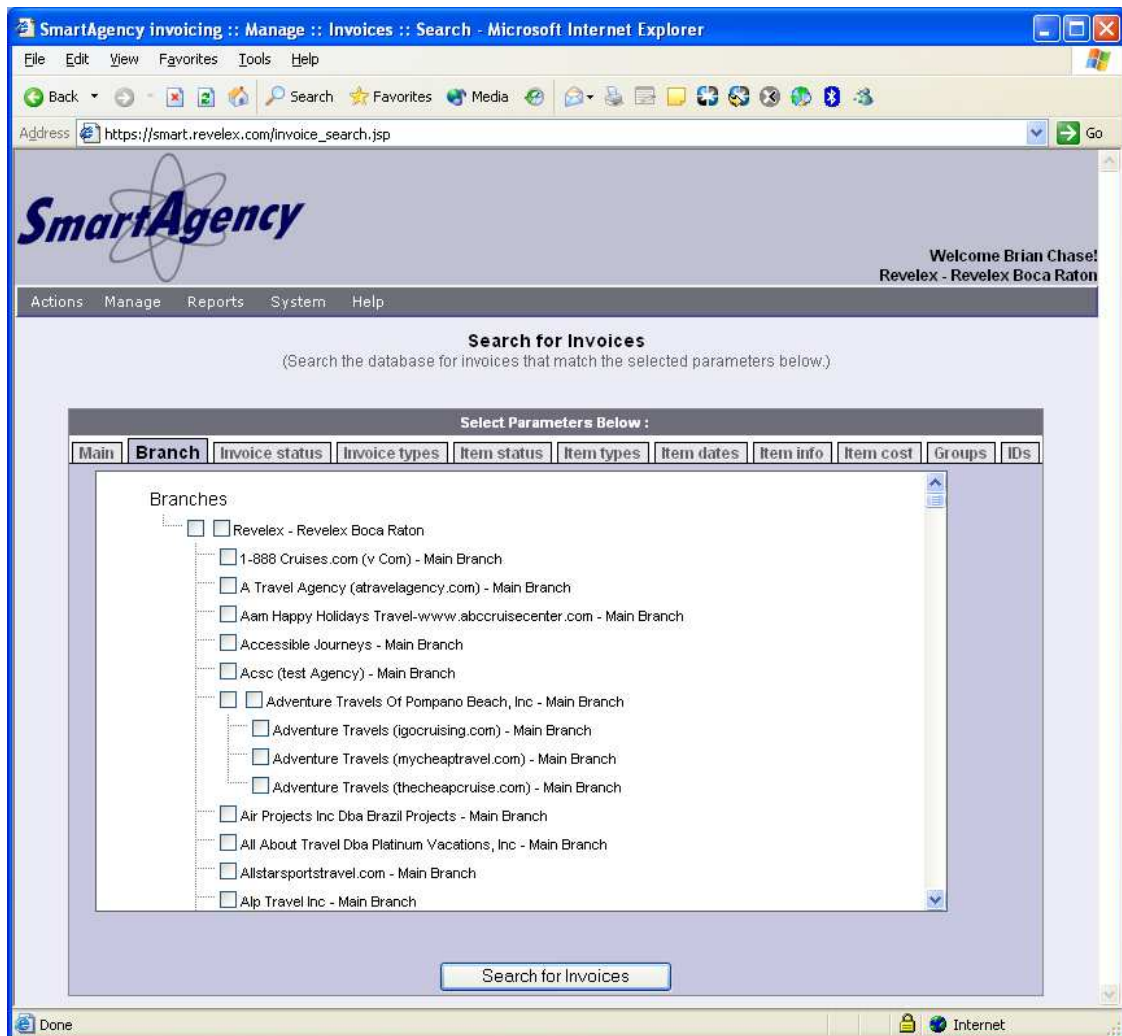
Search for Invoices

Internet

The branch page

This page lists all agencies and their branches owned by your company. If you have registered more than one agency with Revelex, this page may be useful for you. This page will allow you to filter your search to bookings made under the agencies you selected. This page is not required for searching unless you need to filter by agency.

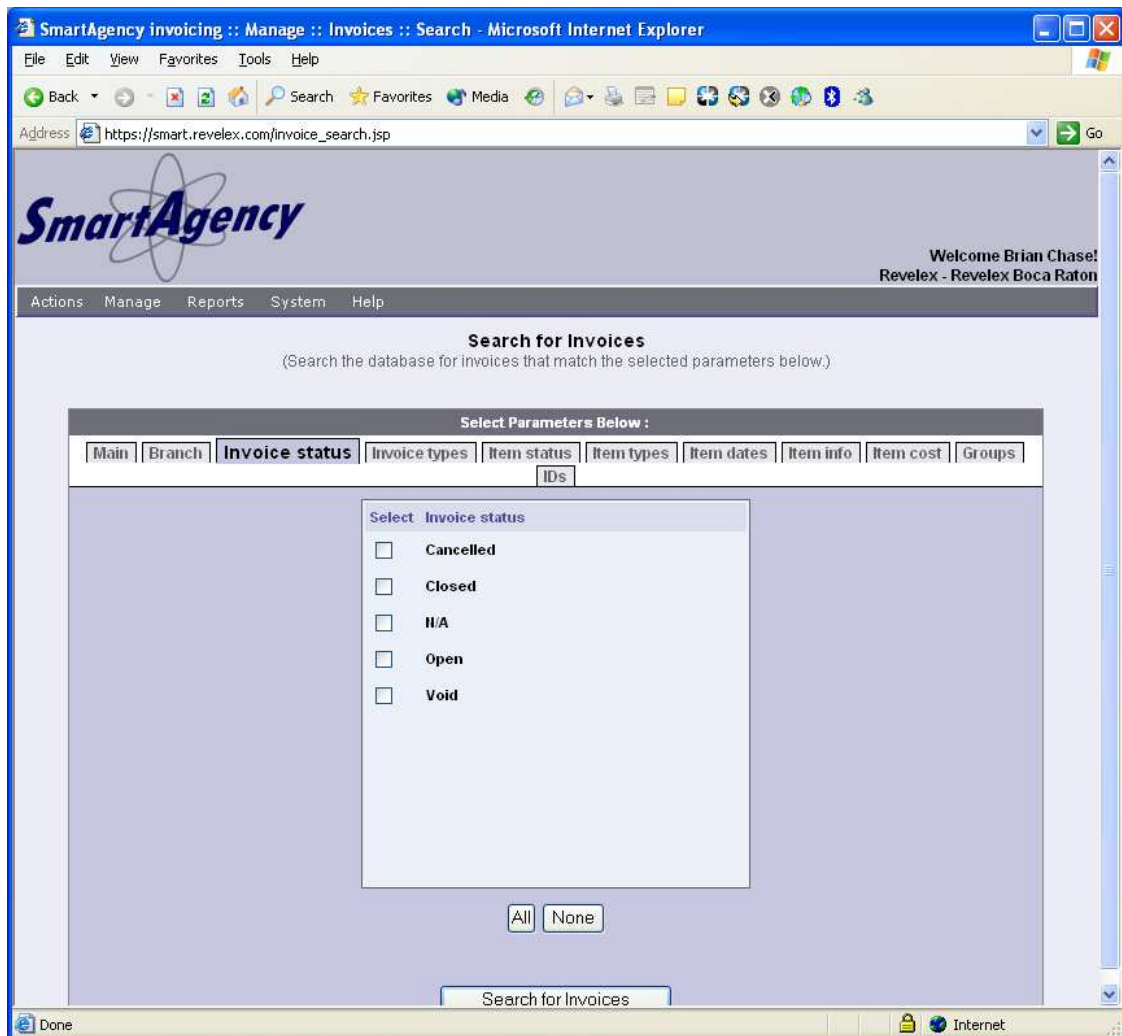
You can ignore this page if you only have one agency registered with Revelex. If you have more than one agency registered, and you want to search bookings for all of your agencies, you can ignore this page.



The invoice status page

This page allows you to filter by the status of a booking. Bookings that are completed and paid in full will be the 'Closed' status. 'Open' bookings may not be completed or may not have a final payment. 'Canceled' of course are canceled bookings. 'Void' and 'N/A' are for future use and are not valid at this time.

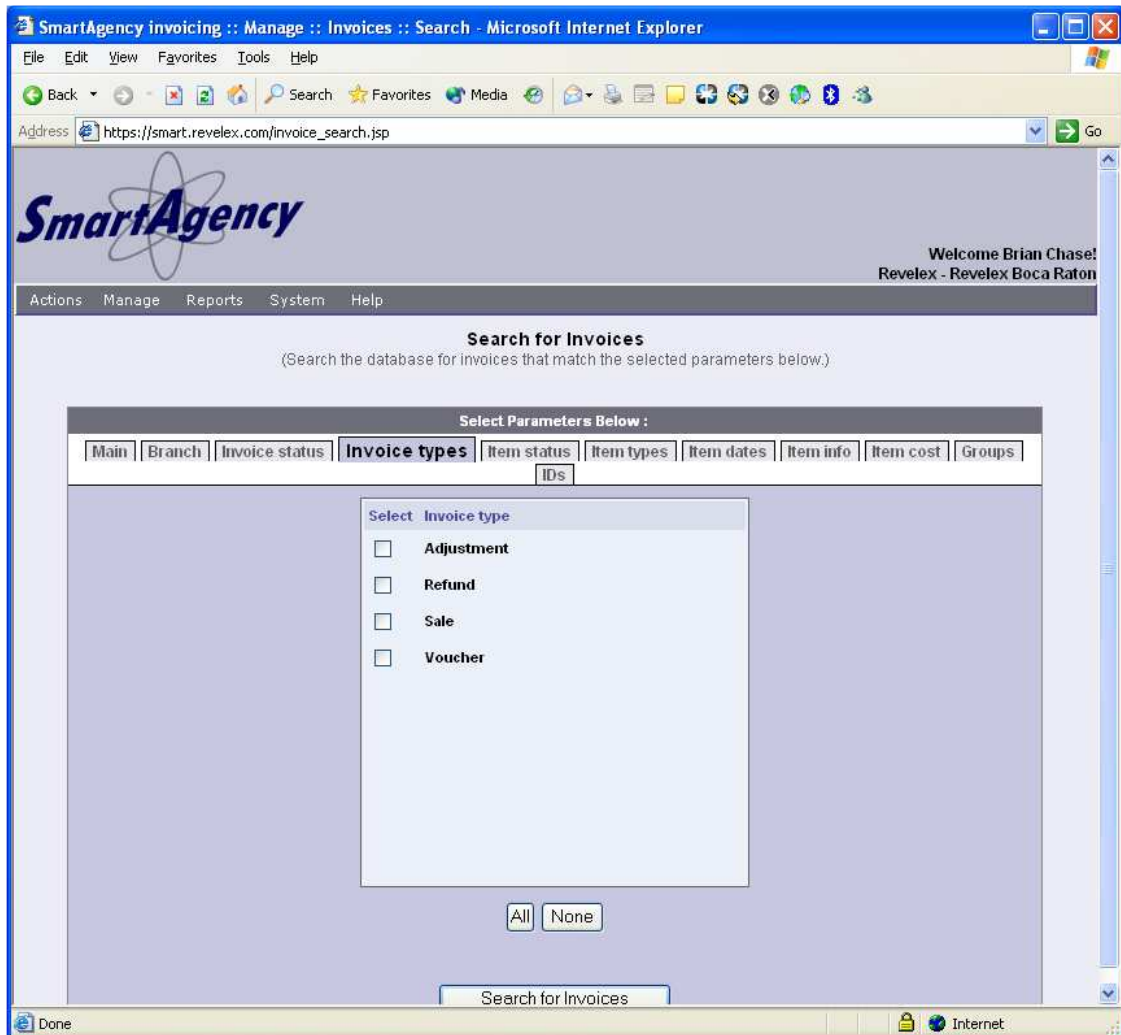
In most cases you will use the Closed or Cancelled option if you wish to export only closed or only cancelled bookings. If you do not select anything, then invoices of all status types are returned.



The invoice types page

This page allows you to filter by the type of invoice. Currently, in SmartAgency all invoices are bookings. Booking invoices will always be of the type 'Sale'. The other types listed are for future use.

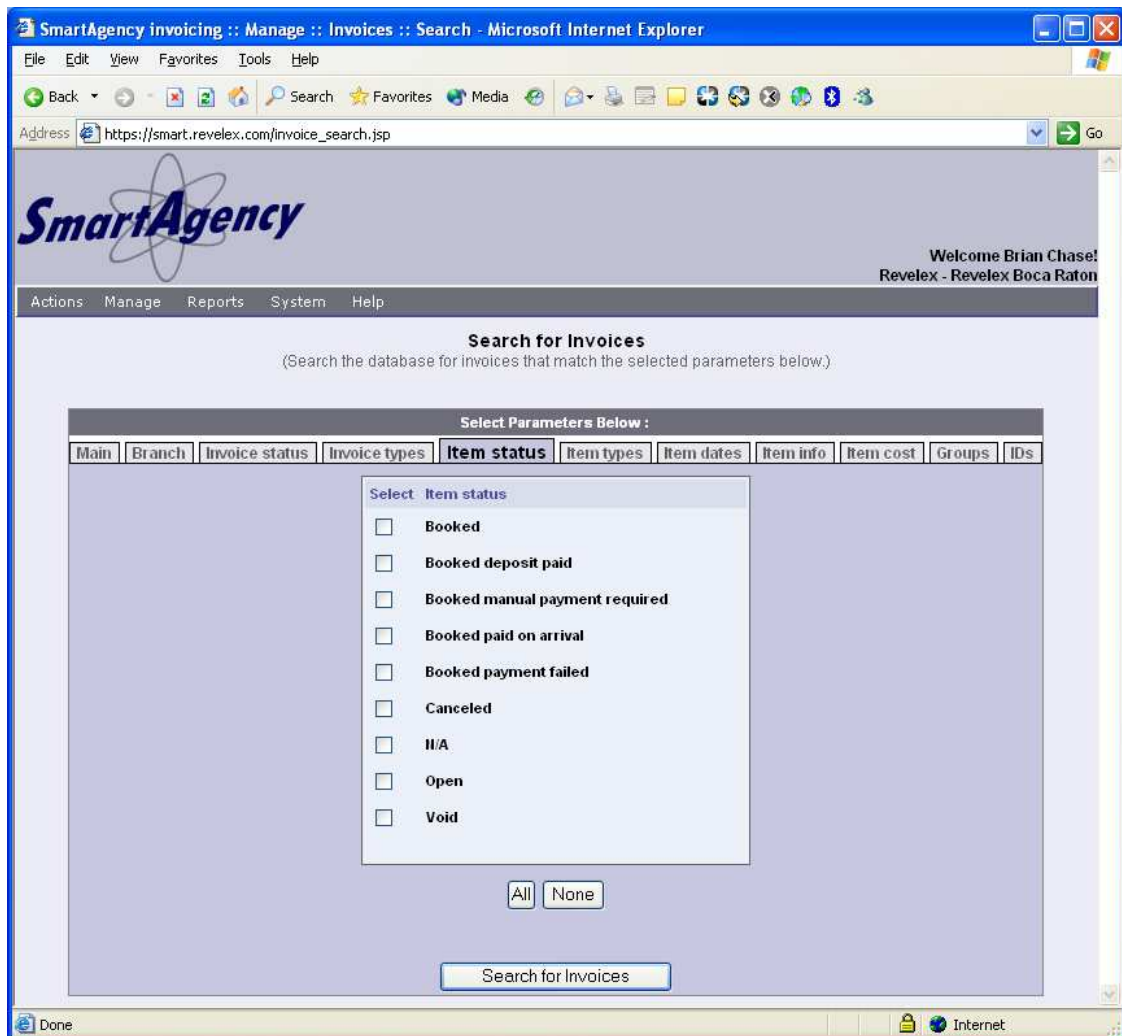
You can ignore this page in your filtering.



The Item status page

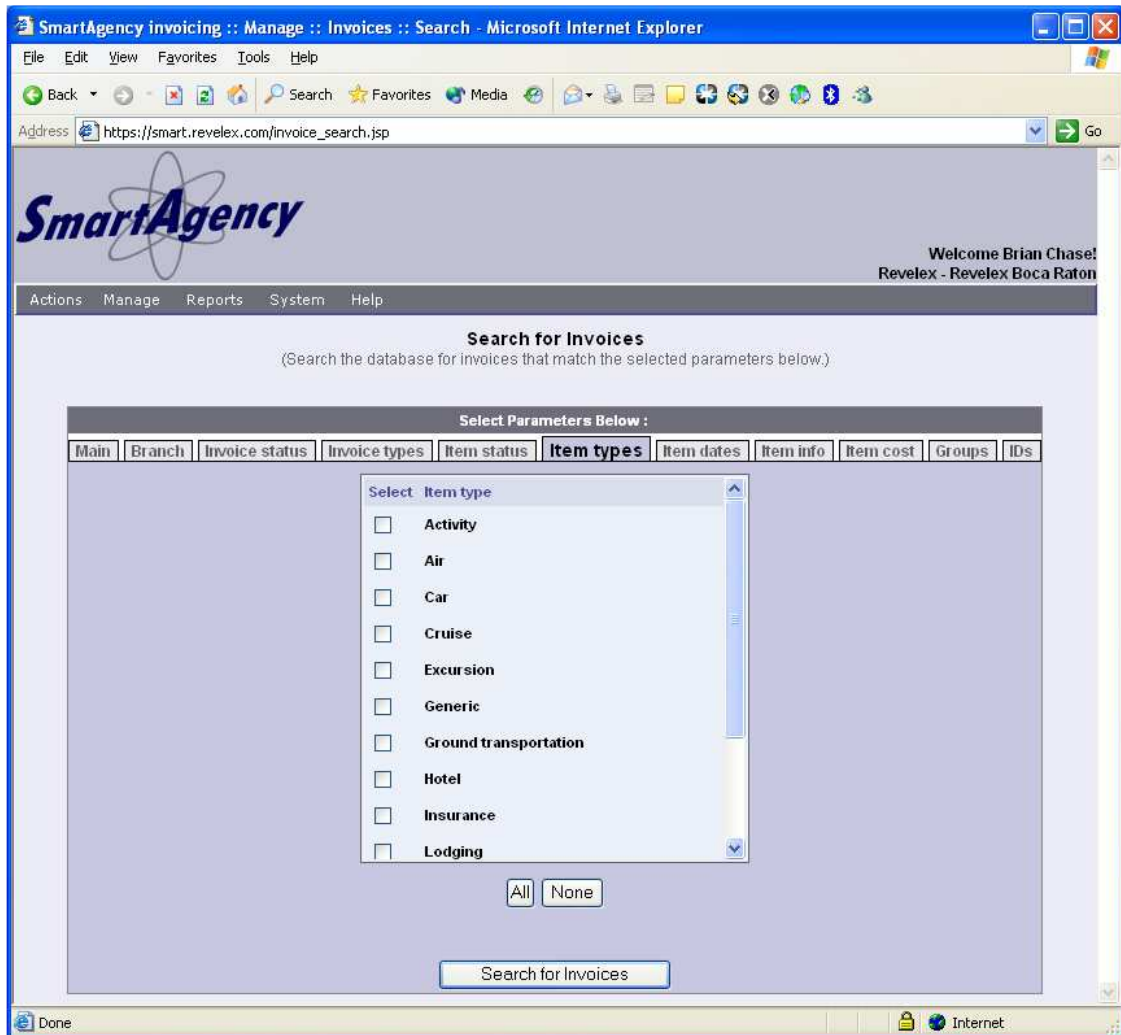
This page lets you filter at the invoice item level. An invoice in SmartAgency will contain one or more invoice items depending on what the client has booked. For example, an invoice may contain an air itinerary item, which is booked, and an insurance itinerary item, which is canceled.

You can ignore this page in most cases unless you specifically want only booked or only cancelled items. Please note that an invoice may contain one or more items. If you specify only Booked, the resulting invoices will contain at least one item that is booked and may contain one or more other items that are not booked.



The item types page

This page lets you filter at the invoice item level. You will most likely use this page if you want to search for bookings of specific travel types. If you ignore this page and do not select anything, all travel types will be returned in your search. Please note that an invoice may contain one or more items. If you specify only cruise the resulting invoices will contain at least one item that is cruise and may contain one or more other items that are not cruise.



The item dates page

This page lets you filter at the invoice item level. From here you can search on things such as start date or end date. Start date is when the booking starts, so in the case of hotels, this is the check in date. In the case of air bookings, this is the departure date. End date is the checkout date, or return date of the booking. You can also type in a city code or full city name for the start and end city fields.

You can ignore this page in most cases unless you are looking for specific bookings.

SmartAgency invoicing :: Manage :: Invoices :: Search - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address https://smart.revelex.com/invoice_search.jsp Go

SmartAgency

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Actions Manage Reports System Help

Search for Invoices
(Search the database for invoices that match the selected parameters below.)

Select Parameters Below :

Main	Branch	Invoice status	Invoice types	Item status	Item types	Item dates	Item info	Item cost	Groups	IDs
------	--------	----------------	---------------	-------------	------------	------------	-----------	-----------	--------	-----

Item Create Date ignore [] and []
(Enter dates like: 12/20/2004, or 12202004)

Item Last Modified Date ignore [] and []
(Enter dates like: 12/20/2004, or 12202004)

Itinerary Start Date ignore [] and []
(Enter dates like: 12/20/2004, or 12202004)

Itinerary End Date ignore [] and []
(Enter dates like: 12/20/2004, or 12202004)

Payment Due Date ignore [] and []
(Enter dates like: 12/20/2004, or 12202004)

Start city []

End city []

Search for Invoices

The Item info page

This page lets you fine-tune your invoice search to specific things such as confirmation numbers, record locators, passenger names, and more.

You can ignore this page in most cases unless you are looking for specific bookings.

The screenshot shows a web browser window titled "SmartAgency invoicing :: Manage :: Invoices :: Search - Microsoft Internet Explorer". The address bar shows "https://smart.revelex.com/invoice_search.jsp". The page header includes the "SmartAgency" logo and a welcome message: "Welcome Brian Chase! Revelex - Revelex Boca Raton". A navigation menu contains "Actions", "Manage", "Reports", "System", and "Help".

The main content area is titled "Search for Invoices" with a sub-instruction: "(Search the database for invoices that match the selected parameters below.)". Below this is a "Select Parameters Below :" section with a tabbed interface. The "Item info" tab is selected, showing the following search criteria:

Main	Branch	Invoice status	Invoice types	Item status	Item types	Item dates	Item info	Item cost	Groups	IDs
Submit to: All										
GDS: All										
Confirmation number: [text input]										
Cancellation number: [text input]										
Record locator: [text input]										
Passive Record locator: [text input] match exactly										
Rate code: [text input]										
Ticket number: [text input]										
Booking site: [text input]										
Vendor name: [text input] Select										
Passenger name: [text input] Select										
[Search for Invoices]										

The item cost page

This page lets you filter your results by certain cost values of the bookings.

You can ignore this page in most cases unless you are looking for specific bookings.

SmartAgency invoicing :: Manage :: Invoices :: Search - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Home Search Favorites Media

Address https://smart.revelex.com/invoice_search.jsp Go

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Actions Manage Reports System Help

Search for Invoices

(Search the database for invoices that match the selected parameters below.)

Select Parameters Below :

Main	Branch	Invoice status	Invoice types	Item status	Item types	Item dates	Item info	Item cost	Groups	IDs
Amount	ignore									
Tax	ignore									
Discount	ignore									
Fee	ignore									
Penalty	ignore									
Total Cost	ignore									
Currency Code										

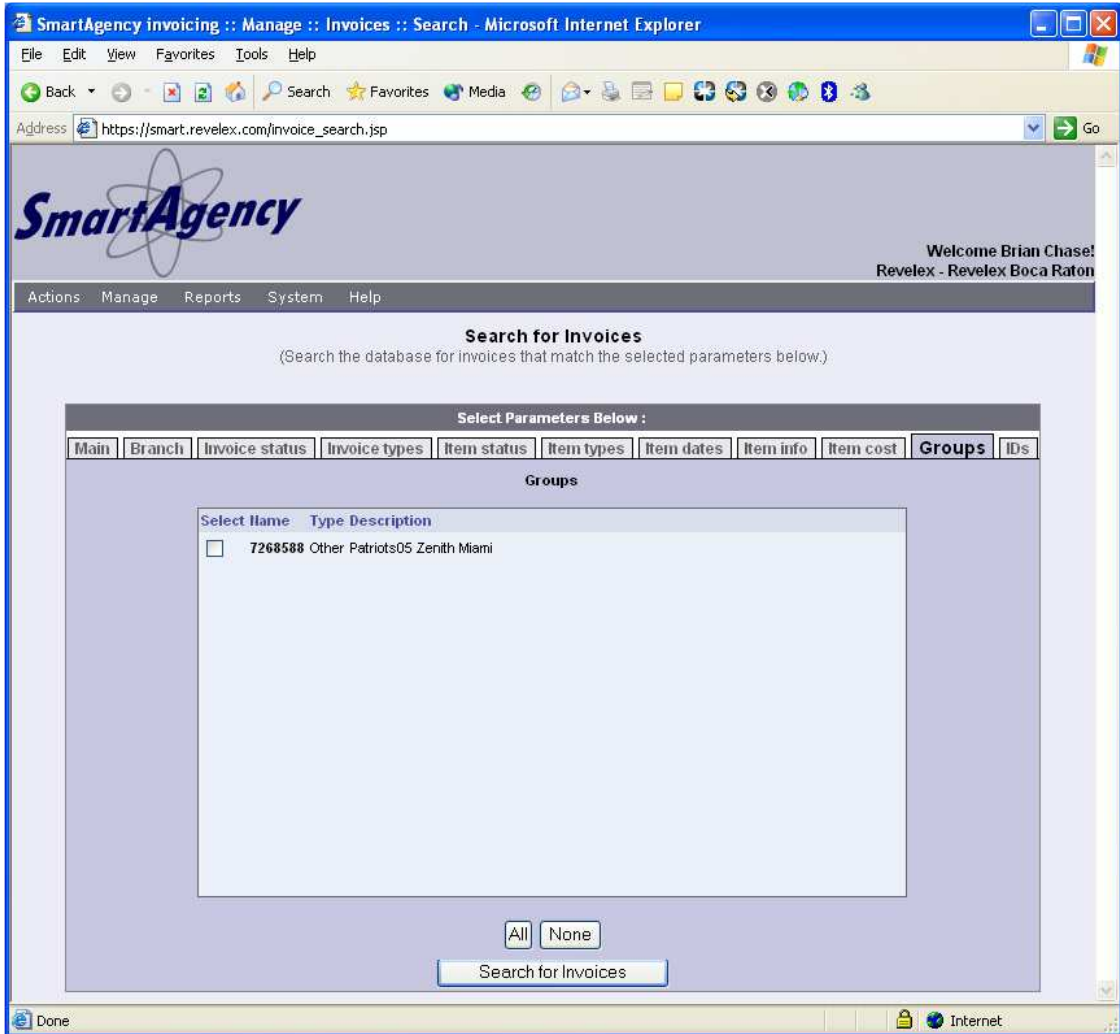
Search for Invoices

Done Internet

The groups page

This page lets you filter using the group feature. A group is a free text ‘tag’ that you can assign to one or more invoices and use the group as a filter when searching.

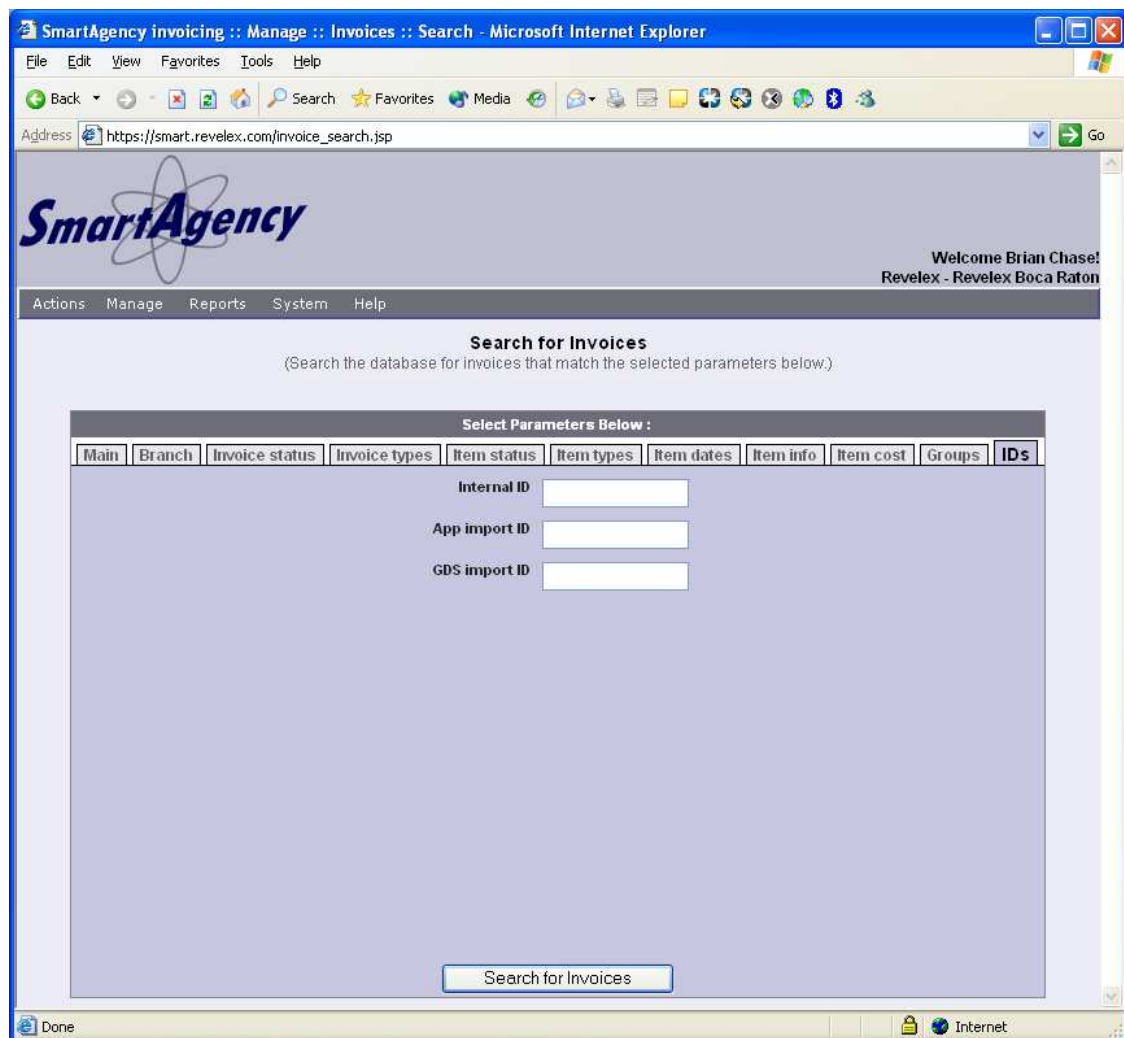
You can ignore this page in most cases unless you are looking for specific bookings.



The ids page

This page is typically used for advanced usage. This page lets you search by cross reference ID values. For example, invoices in SmartAgency are separate entities from bookings in PowerAgent or consumer sites. Although they are exact copies, their internal IDs are different. This page allows you to search for a booking based on the PowerAgent booking ID.

You can ignore this page.



The search results page

This page shows the results of your search, or show all, show top 100, or show top 1000 requests. If you performed a search, this list will show all invoices that meet your search criteria. If you arrived to this page by selecting Show All, this will list all bookings for your agency and sub agencies. If you arrived to this page by selecting Show top 100, or Show top 1000, this will list the 100 or 1000 of the most recent bookings for your agency and sub agencies.

From this page you can perform an export. The export is based on the items you select in the list. In the image below, you will notice that only one booking is selected, therefore only the one selected booking will be exported.

SmartAgency invoicing :: Manage :: Invoices :: Search Results Invoice List - Microsoft Internet Explorer

Address: https://smart.revelex.com/invoice_list.jsp?all=1&limit=100

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Actions: Manage Reports System Help

Invoice results (100 total) [Add] [Edit] [Details] [Search] [Export]

Date	Agency	Branch	SoldTo	Number	Type	Status	Air	Car
4/1/03	Revelex	Revelex Boca R...	Matthew Hurley	511	Sale	Open	0	0
3/10/03	Revelex	Revelex Boca R...	Peggy Kile	108	Sale	Open	0	1
4/7/03	Revelex	Revelex Boca R...	Michele Namitka	592	Sale	Open	0	1
4/3/03	Revelex	Revelex Boca R...	Claude Ricks	544	Sale	Open	0	0
4/14/03	Revelex	Revelex Boca R...	Scott Johnson	718	Sale	Open	0	1
4/5/03	Revelex	Revelex Boca R...	Hao Chen	562	Sale	Open	0	0
7/3/04	Revelex	Revelex Boca R...	Robert Chan	746	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	747	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	748	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	749	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	750	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	751	Sale	Open	0	1
7/4/04	Revelex	Revelex Boca R...	Robert Chan	752	Sale	Open	0	1
7/4/04	Revelex	Revelex Boca R...	Robert Chan	753	Sale	Open	0	1
7/4/04	Revelex	Revelex Boca R...	Robert Chan	754	Sale	Open	0	0
8/6/04	Revelex	Revelex Boca R...	Robert Chan	758	Sale	Open	0	0
8/9/04	Revelex	Revelex Boca R...	Robert Chan	759	Sale	Open	0	0
9/4/04	Revelex	Revelex Boca R...	Robert Chan	763	Sale	Open	0	0
10/28/04	Revelex	Revelex Boca R...	Robert Chan	776	Sale	Open	0	0
10/30/04	Revelex	Revelex Boca R...	Robert Chan	777	Sale	Open	0	0
10/30/04	Revelex	Revelex Boca R...	Robert Chan	778	Sale	Open	0	1
10/31/04	Revelex	Revelex Boca R...	Robert Chan	779	Sale	Open	0	0
10/31/04	Revelex	Revelex Boca R...	Robert Chan	780	Sale	Open	0	1
10/31/04	Revelex	Revelex Boca R...	Robert Chan	781	Sale	Open	0	1
11/1/04	Revelex	Revelex Boca R...	Robert Chan	782	Sale	Open	0	0
11/4/04	Revelex	Revelex Boca R...	Robert Chan	783	Sale	Open	0	0
11/26/04	Revelex	Revelex Boca R...	Robert Chan	809	Sale	Open	0	1

Applet com.revelex.cassius.gui.Table started

In the image below you will notice multiple bookings are selected. To select multiple bookings like the image below, hold down the 'Ctrl' key on the keyboard while using the mouse to click on the items you need. Another method is to hold down the 'Shift' key and use the mouse to select a group of items.

In most cases you will want to export all items in the list. To do this, click the first item in the list. Next using the scroll bar on the table, scroll to the bottom of the list. Next, hold down the Shift key and click the last item. This will select all items in the table for you to export. When you are ready to export, click the export button.

SmartAgency invoicing :: Manage :: Invoices :: Search Results Invoice List - Microsoft Internet Explorer

Address: https://smart.revelex.com/invoice_list.jsp?all=1&limit=100

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Actions Manage Reports System Help

Invoice results (100 total) Add Edit Details Search Export

Date	Agency	Branch	SoldTo	Number	Type	Status	Air	Car
4/1/03	Revelex	Revelex Boca R...	Matthew Hurley	511	Sale	Open	0	0
3/1/03	Revelex	Revelex Boca R...	Peggy Kile	108	Sale	Open	0	1
4/7/03	Revelex	Revelex Boca R...	Michele Namitka	592	Sale	Open	0	1
4/3/03	Revelex	Revelex Boca R...	Claude Ricks	544	Sale	Open	0	0
4/14/03	Revelex	Revelex Boca R...	Scott Johnson	718	Sale	Open	0	1
4/5/03	Revelex	Revelex Boca R...	Hao Chen	562	Sale	Open	0	0
7/3/04	Revelex	Revelex Boca R...	Robert Chan	746	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	747	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	748	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	749	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	750	Sale	Open	0	1
7/3/04	Revelex	Revelex Boca R...	Robert Chan	751	Sale	Open	0	1
7/4/04	Revelex	Revelex Boca R...	Robert Chan	752	Sale	Open	0	1
7/4/04	Revelex	Revelex Boca R...	Robert Chan	753	Sale	Open	0	1
7/4/04	Revelex	Revelex Boca R...	Robert Chan	754	Sale	Open	0	0
8/6/04	Revelex	Revelex Boca R...	Robert Chan	758	Sale	Open	0	0
8/9/04	Revelex	Revelex Boca R...	Robert Chan	759	Sale	Open	0	0
9/4/04	Revelex	Revelex Boca R...	Robert Chan	763	Sale	Open	0	0
10/28/04	Revelex	Revelex Boca R...	Robert Chan	776	Sale	Open	0	0
10/30/04	Revelex	Revelex Boca R...	Robert Chan	777	Sale	Open	0	0
10/30/04	Revelex	Revelex Boca R...	Robert Chan	778	Sale	Open	0	1
10/31/04	Revelex	Revelex Boca R...	Robert Chan	779	Sale	Open	0	0
10/31/04	Revelex	Revelex Boca R...	Robert Chan	780	Sale	Open	0	1
10/31/04	Revelex	Revelex Boca R...	Robert Chan	781	Sale	Open	0	1
11/1/04	Revelex	Revelex Boca R...	Robert Chan	782	Sale	Open	0	0
11/4/04	Revelex	Revelex Boca R...	Robert Chan	783	Sale	Open	0	0
11/26/04	Revelex	Revelex Boca R...	Robert Chan	809	Sale	Open	0	1

Applet com.revelex.cassius.gui.Table started

The export page

This is the main export options page. The first line indicates how many records will be exported, as you can see in the image, 4 records will be exported.

Export format

The format option allows you to choose the target output format. This is a dropdown list, which contains a variety of formats such as CSV, XML, ClientBase, Globalware and more.

SmartAgency invoicing - Export - Microsoft Internet Explorer

Address https://smart.revelex.com/export_popup.jsp?obj=invoice&id=7384&id=8741&id=70752&id=70752 Go

Export invoice

Exporting 4 record(s)
Select the format of your export from the list

Format

Starting invoice number

Include activity itinerary items

Include air itinerary items

Include car itinerary items

Include cruise itinerary items

Include excursion itinerary items

Include ground transportation itinerary items

Include hotel itinerary items

Include insurance itinerary items

Include lodging itinerary items

Include other itinerary items

Include service fee itinerary items

Include train itinerary items

Include vacation itinerary items

Zip (compress) export files

Invoice starting number

The starting invoice number option allows you to specify an invoice number to begin your export at. This is optional, and if you do not specify a value, the current invoice numbers in SmartAgency are used. If you already have invoices in the target accounting system that you are importing into, you may want to use this invoice number feature. For example if the last invoice number in your accounting system is 300, set the starting invoice number to 301.

Include itinerary item types

The export page contains options for exporting specific itinerary item types. This feature is useful when you need only specific booking types exported.

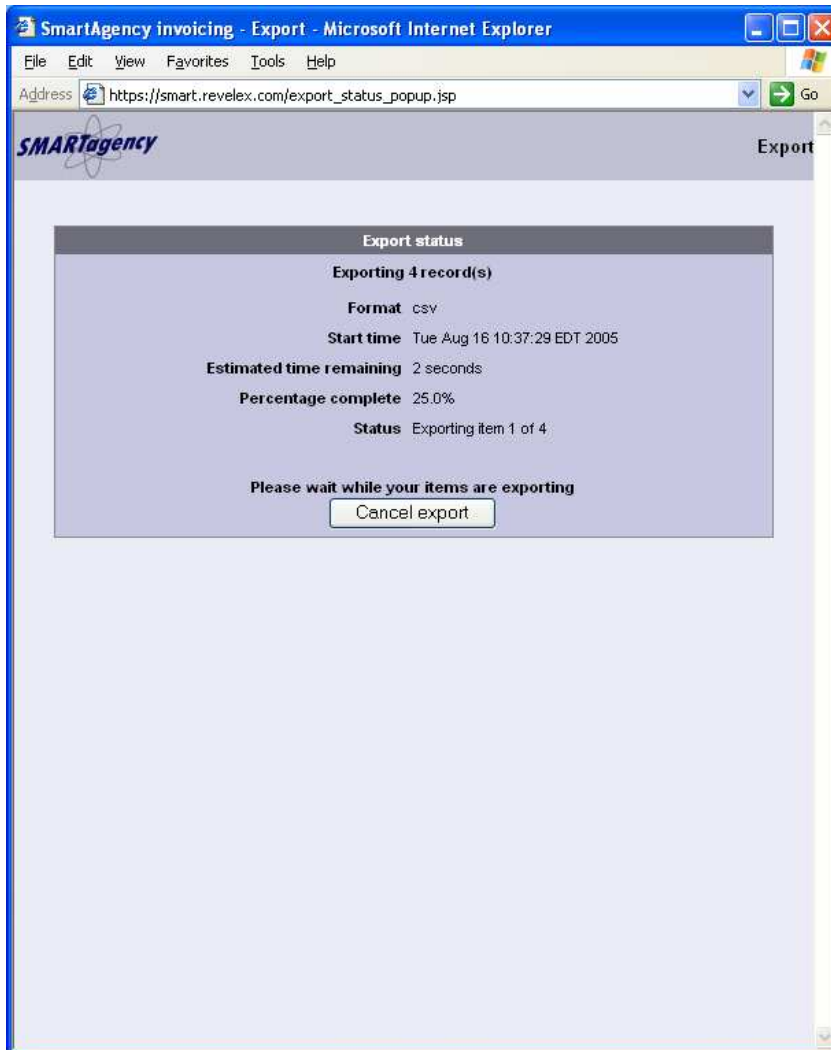
For example, if you search for only insurance bookings, all invoices containing insurance bookings are returned. These invoices may contain bookings of other types such as air or cruise along with the insurance booking. You can use this feature to force that only the insurance bookings are exported.

Zip (compress) export files

This option allows you to compress the one or more exported files into one compressed .zip file. You must use a zip program to uncompress these files after you download it.

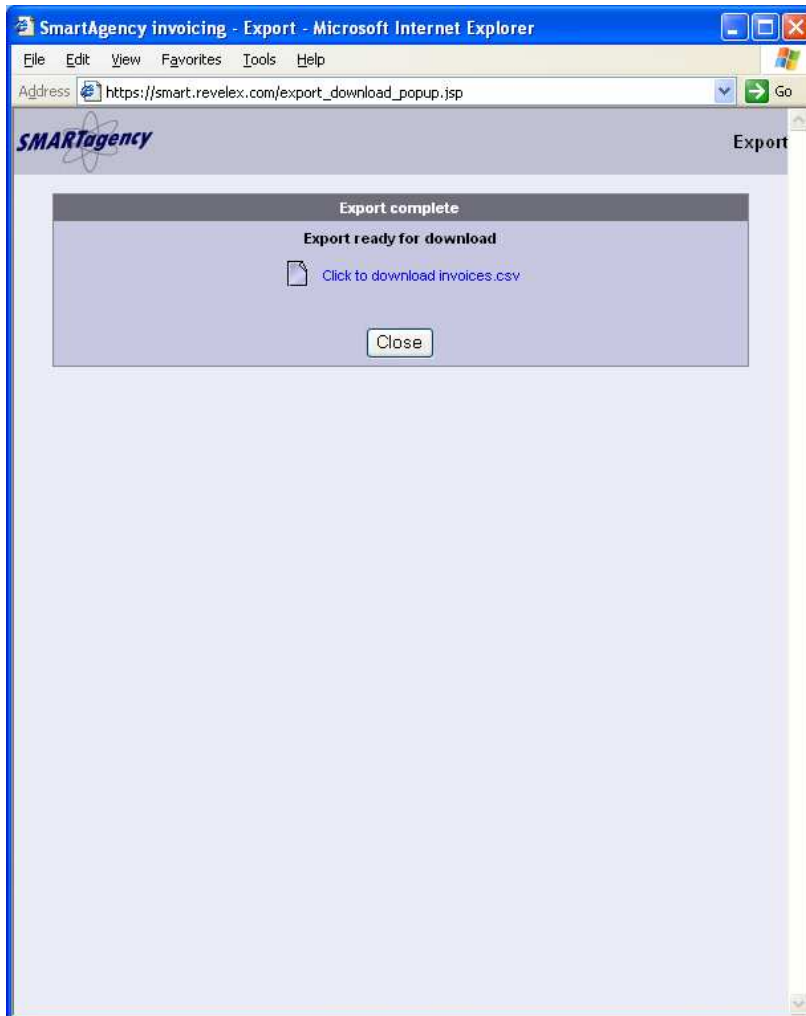
The export status page

Once you start your export, this page will appear and display the current status of the export. From this page you can determine how long the export will take to complete. This page will automatically update its information every 5 – 10 seconds. Once the export is complete, you will see the export complete page.



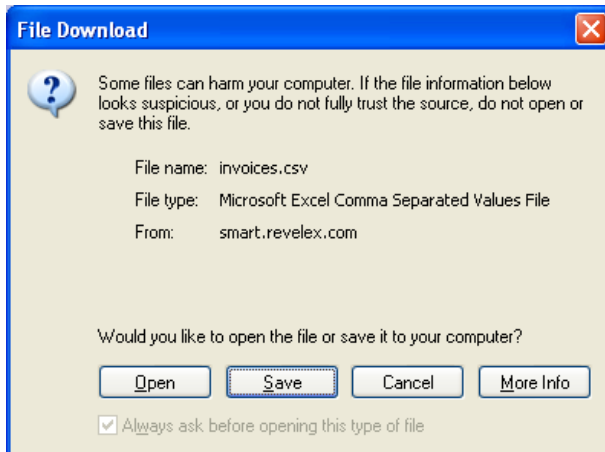
The export complete page

This page will provide links for you to download the exported file(s). There will be a link for each file generated, however, in most cases there is only one link. Click on the link and you will see the save file window appear.

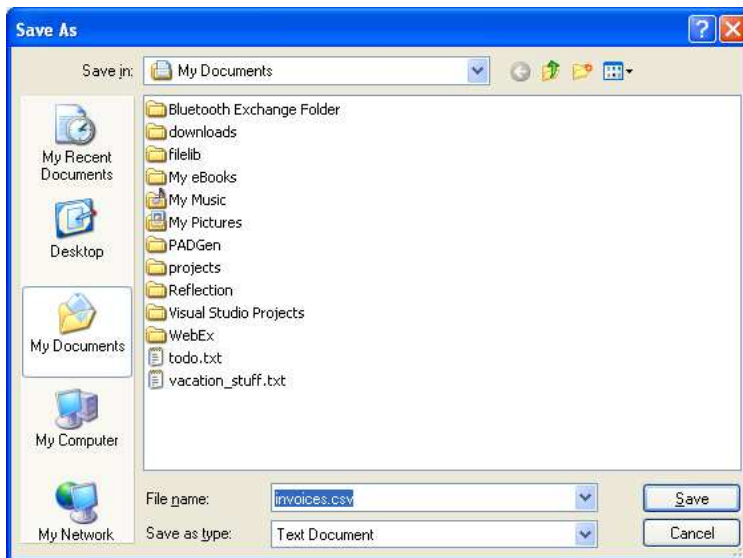


The file download window

After you click a link in the export complete page, this window will appear (on Windows OS) Simply click the save button.



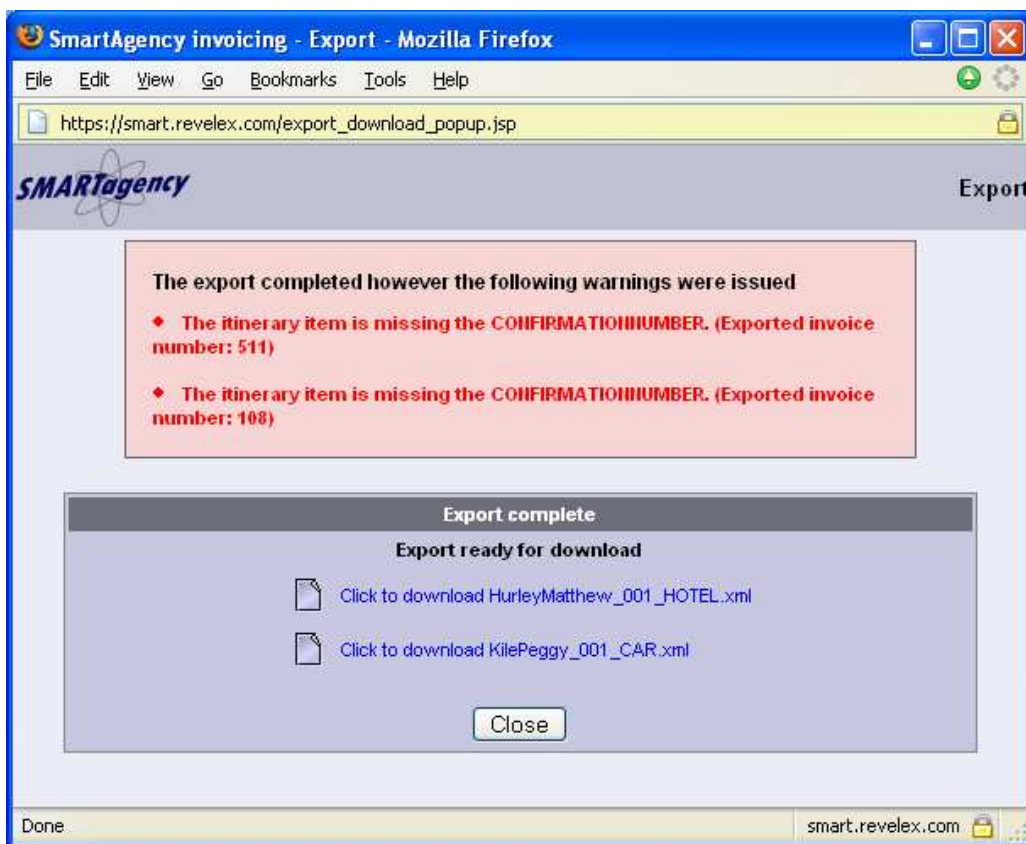
Next you will be prompted where to save the export files. In most cases you can save the export files wherever you like. For special formats such as Globalware, you must save the export files in a specific directory.



Troubleshooting export issues

While exporting data you may encounter warnings or errors. When warnings happen, usually they are intended for you the end user to resolve. When errors happen, Revelex system administrators receive email notifications and will work on resolving the issue.

The following image shows an example of warnings. The warnings in this case indicate the itinerary items are missing a confirmation number. This warning will happen if you export invoices that are still Open and not Booked. Only Booked invoices contain confirmation numbers.



Configuring agent commissions

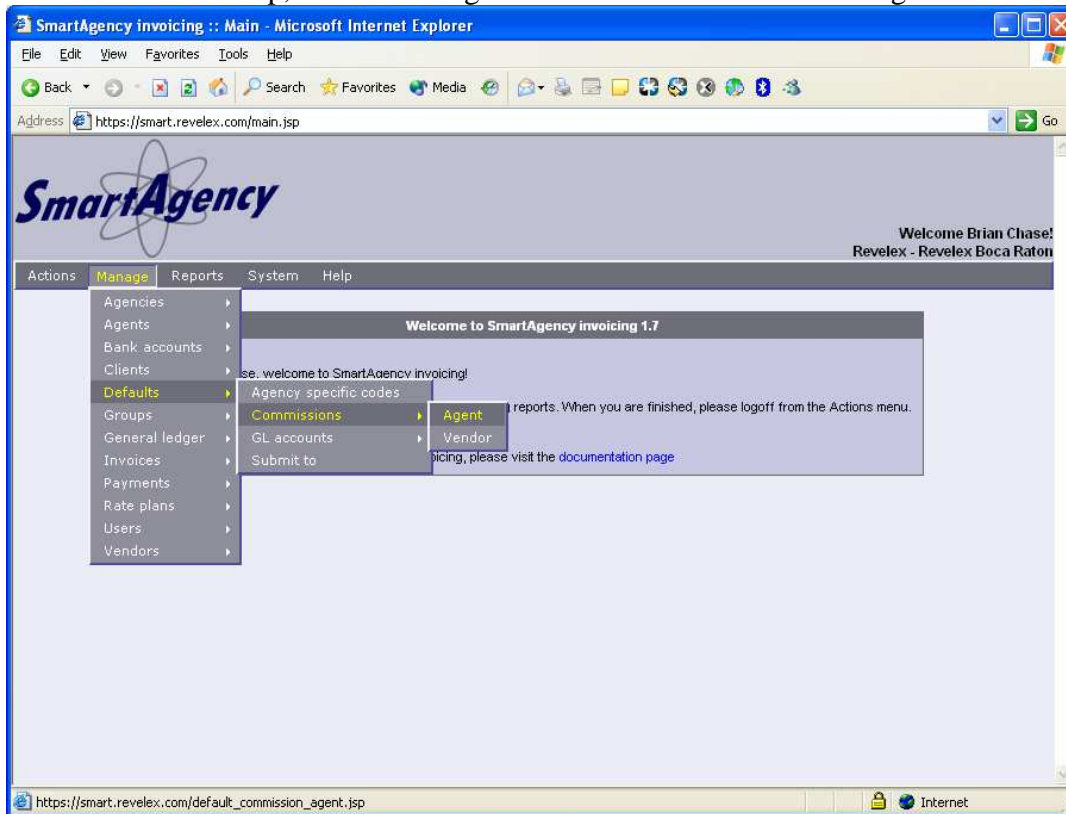
This section describes how you can configure sales commission amounts for your agents in the system. There are two areas in the system where you can configure agent commissions. One area is the default commission section where you can specify commission amounts for all agents in your agency. The other area is the individual agent commission section where you can give specific amounts to specific agents. You can use either method or a combination of both to yield a highly custom commissions schedule. If you use a combination of both methods, any commissions set for a specific agent will override the commissions set in the default section.

Agent commissions are categorized by the booking type and by agent type. This allows for are highly custom configurations of agent commissions. For example, with default agent commissions you can specify all hotels booked by inside agents receive a 20% commission and all hotels booked by outside agents receive a 22% commission. By adding an individual agent commission, you can further specify that John Smith is paid 23% on all hotel bookings. Flat rates are also available instead of percentages so that John Smith can be paid \$15 for each hotel booking.

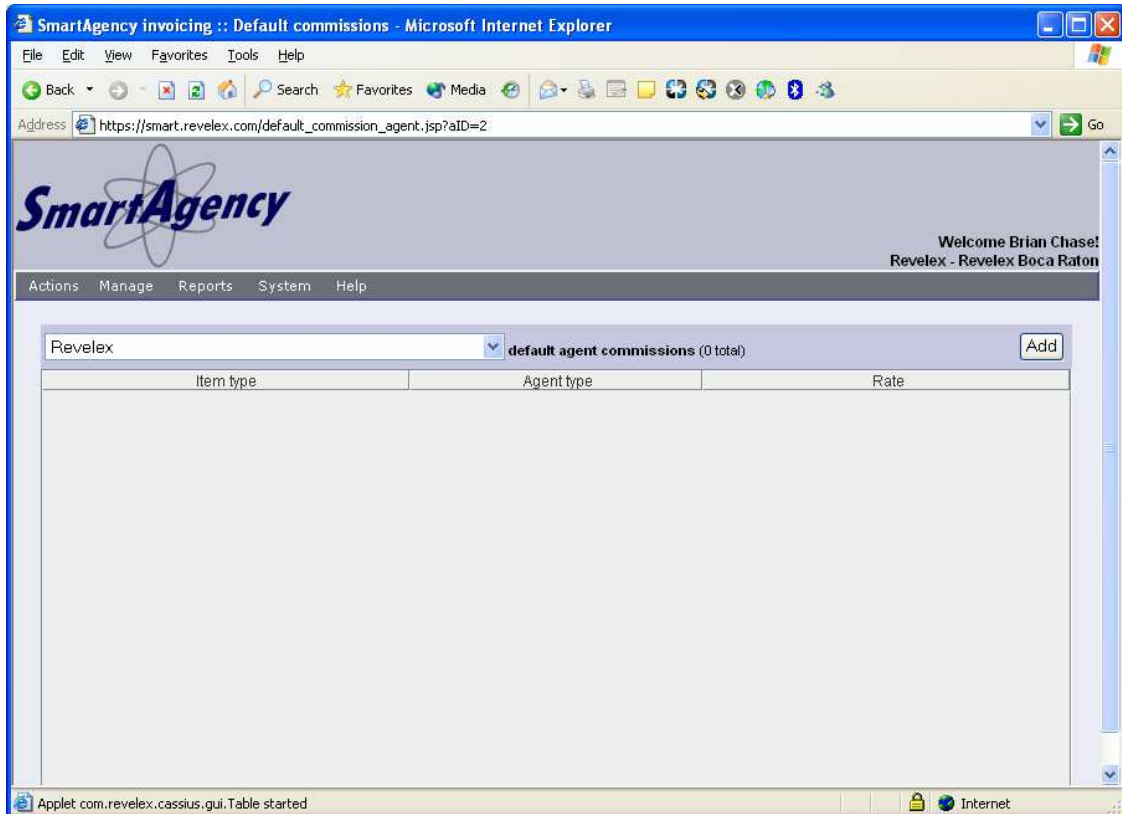
When you change agent commissions, the change is applied to any new booking from the moment forward after the change. To change existing commissions in the system, you must use the recalculate commission section described later.

Setting default agent commissions

This section describes how to set a default commission amount for all agents. From the menu on top, choose Manage > Defaults > Commissions > Agent



You will arrive at the default agent commission area where you can begin adding or editing default commissions. If you have multiple agencies registered with Revelex, can select the agency for configuring default commissions. You can select a different agency by changing the value in the box next to the text 'default agent commissions'.



To add a new default commission, click the Add button. The Default commission editor will appear.

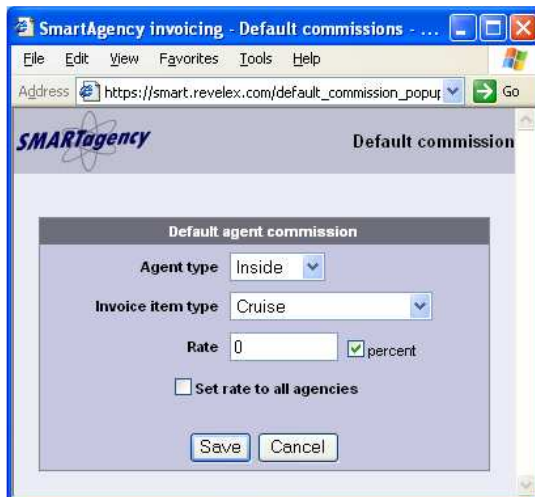
Agent type – Most agents will be the Inside type. This is the value you should use unless you have modified your agents in the system to be of other types.

Invoice item type – This is where you can set rules such as Cruise bookings pay 20% commissions to all agents.

Rate – This is the commission amount to assign

Percent – When this is checked, the rate will be a percentage of the sale. Otherwise rate will be a flat dollar amount.

Set rate to all agencies – If you have multiple agencies in the system, by checking this box your settings will apply to all agencies.



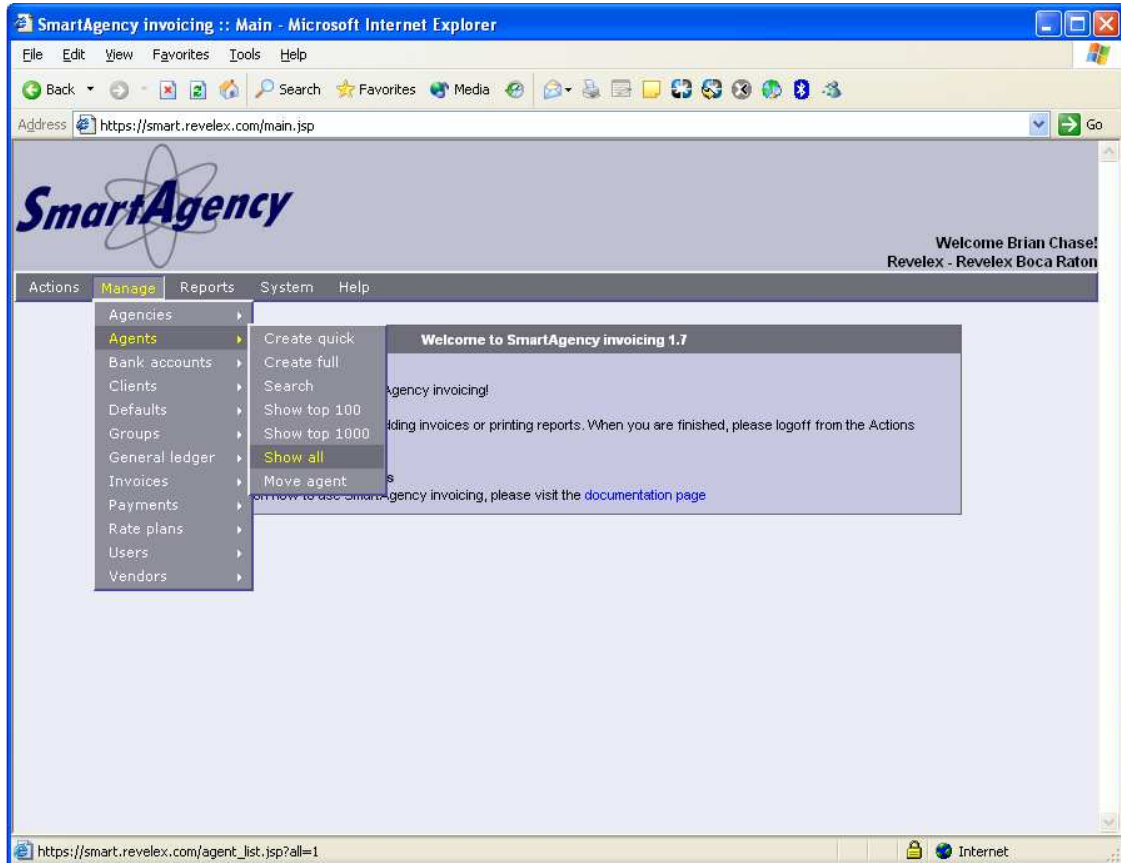
The screenshot shows a web browser window titled "SmartAgency invoicing - Default commissions". The address bar shows "https://smart.revelex.com/default_commission_popup". The page content includes the "SMARTagency" logo and the heading "Default commission". Below this is a form titled "Default agent commission" with the following fields:

- Agent type:** A dropdown menu set to "Inside".
- Invoice item type:** A dropdown menu set to "Cruise".
- Rate:** A text input field containing "0".
- percent:** A checkbox that is checked.
- Set rate to all agencies:** An unchecked checkbox.

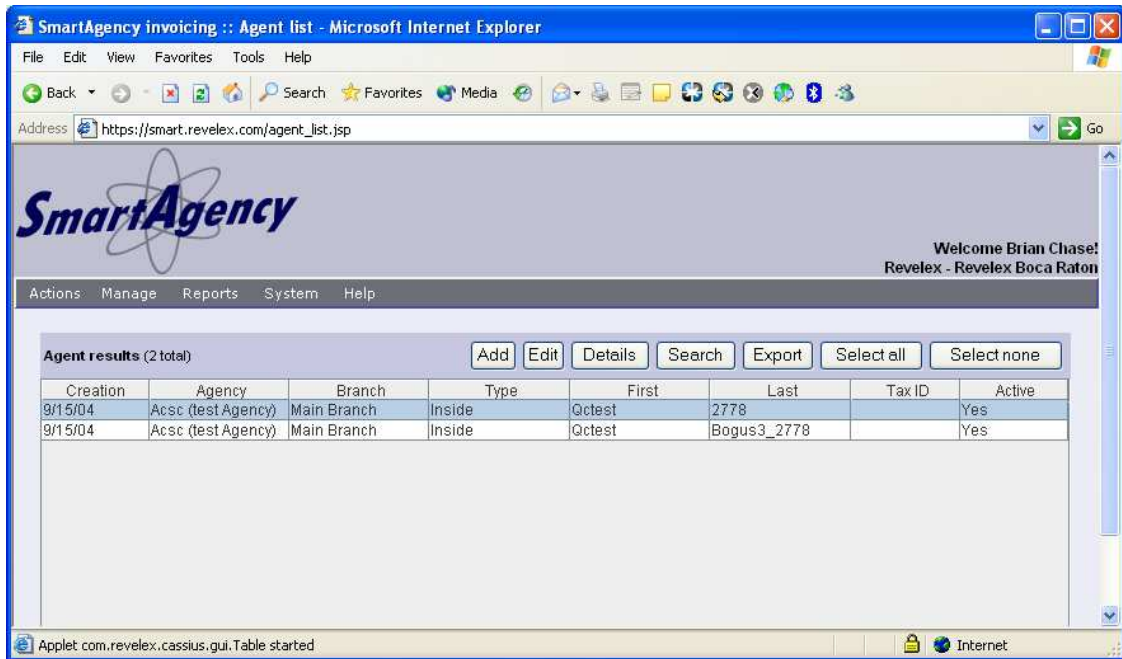
At the bottom of the form are "Save" and "Cancel" buttons.

Setting individual agent commissions

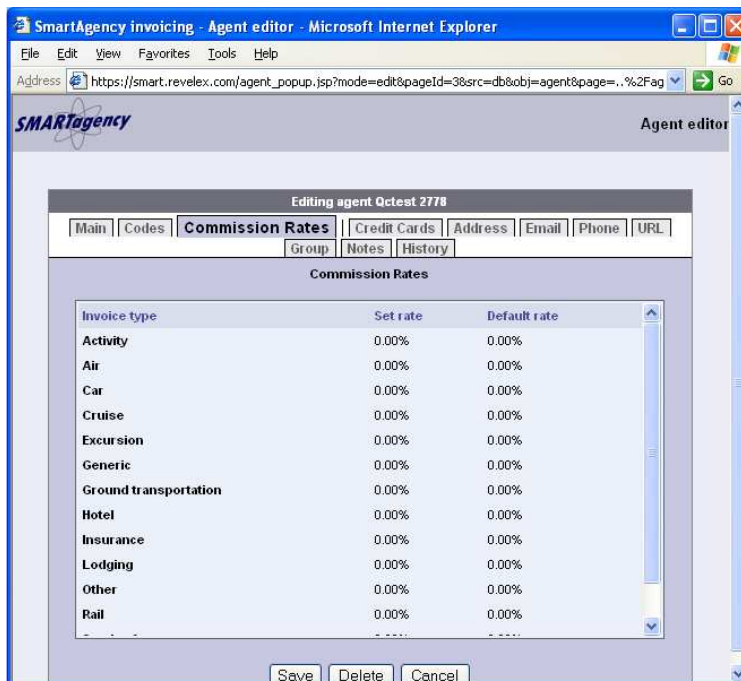
This section describes how to set commissions for a specific agent.
From the menu on top, choose Manage > Agents > Show all



After making the menu selection, you will see a list of all your agents in the system.



From the list, select the agent you wish to modify and then click the Edit button above the list. You will then see the agent editor screen. On this screen, click the 'Commission Rates' tab to begin editing commission rates.



An agent's commission rates are associated with the travel type of a booking. The first column on this screen lists the available travel types. The second column shows the specific commission amount (Set rate) and the third column shows any default commission value (Default rate). When you set a commission in this area, it will become the 'Set rate', which always overrides the 'Default rate'. The default rate is described earlier in this chapter.

To add or edit a specific commission rate for the agent you are editing, click on the Invoice type name in the list. For example, if you want to assign a 20% commission for cruises, click on cruise in the list. You will see the commission editor screen.

Rate – This is the commission amount to assign

Percent – When this is checked, the rate will be a percentage of the sale. Otherwise rate will be a flat dollar amount.

Once you set the commission, click the save button on the Commission Rate screen. You can add additional commissions to the agent by clicking on the Invoice type name.

When you are done **you must click the Save button on the agent editor screen** as well.



Configuring vendor commissions

This section describes how you can configure sales commission amounts owed to your agency by vendors.

Revelex can determine cruise-booking commissions and will automatically apply them in this system. For all other travel types, you will need to adjust your vendor commissions.

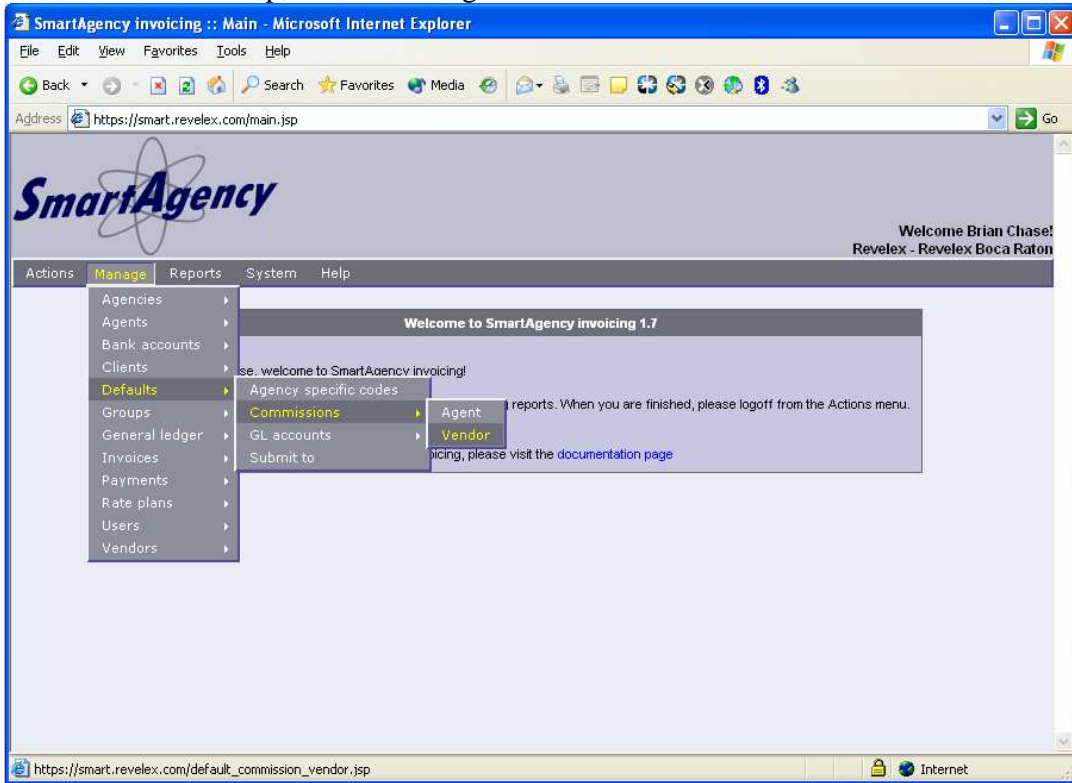
There are two areas in the system where you can configure vendor commissions. One area is the default commission section where you can specify commission amounts for all vendor sales. The other area is the individual vendor commission section where you can set specific amounts to specific vendors. You can use either method or a combination of both to yield a highly custom commissions schedule. If you use a combination of both methods, any commissions set for a specific vendor will override the commissions set in the default section.

Vendor commissions are categorized by the GDS and by vendor type. This allows for are highly custom configurations of vendor commissions. For example, with default vendor commissions you can specify all hotels booked on Amadeus to pay a 20% commission and all hotels booked on Pegasus to pay a 22% commission. By adding an individual vendor commission, you can further specify that the Doubletree Grand Hotel Biscayne Bay pays 23% on Amadeus and 24% on Pegasus. Flat rates are also available instead of percentages so that \$15 can be paid for each hotel booking.

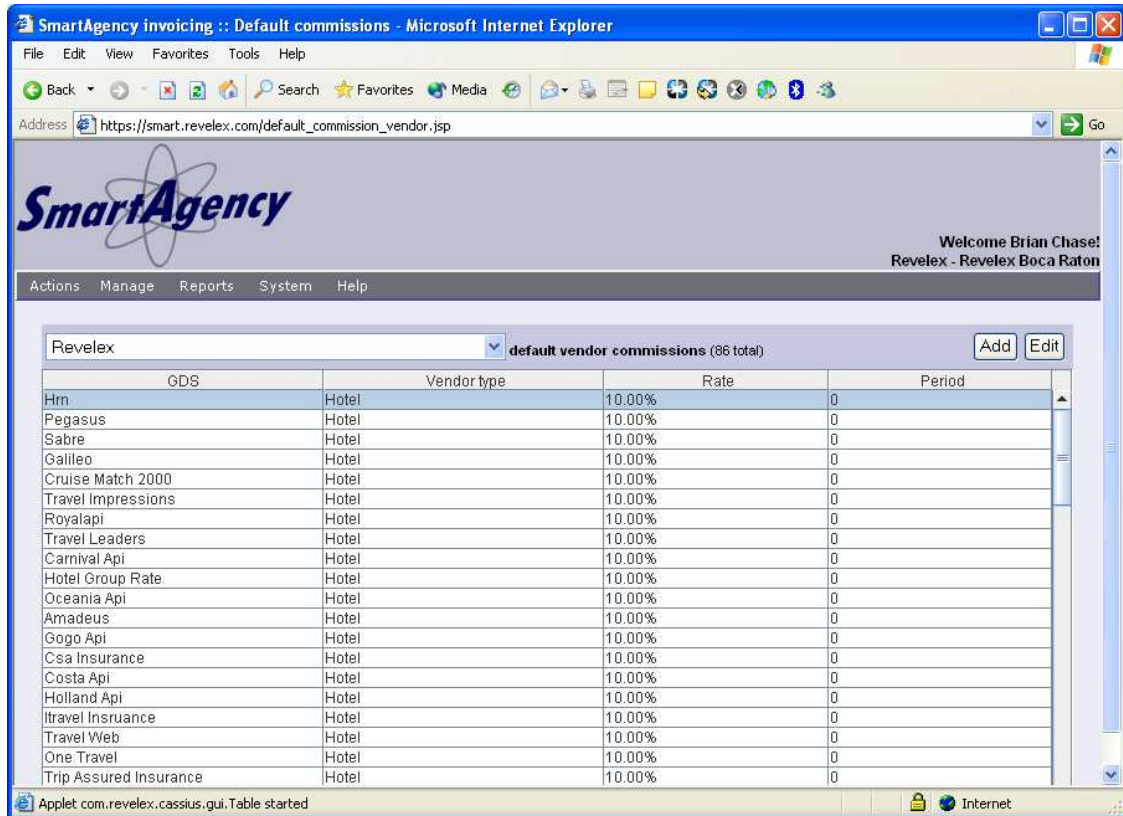
When you change vendor commissions, the change is applied to any new booking from the moment forward after the change. To change existing commissions in the system, you must use the recalculate commission section described later.

Setting default vendor commissions

This section describes how to set a default commission amount for all agents. From the menu on top, choose Manage > Defaults > Commissions > Vendor



You will arrive at the default vendor commission area where you can begin adding or editing default commissions. If you have multiple agencies registered with Revelex, can select the agency for configuring default commissions. You can select a different agency by changing the value in the box next to the text 'default vendor commissions'.



To add or edit a default commission, click the Add or Edit button. The Default commission editor will appear.

Rate – This is the commission amount to assign

Percent – When this is checked, the rate will be a percentage of the sale. Otherwise rate will be a flat dollar amount.

Set rate to all agencies – If you have multiple agencies in the system, by checking this box your settings will apply to all agencies.

SmartAgency invoicing - Default commissions - ...

File Edit View Favorites Tools Help

Address https://smart.revelex.com/default_commission_popup Go

SMARTagency Default commission

Hotel vendor sales from Hrn

Rate: 10.00 percent

Period: 0

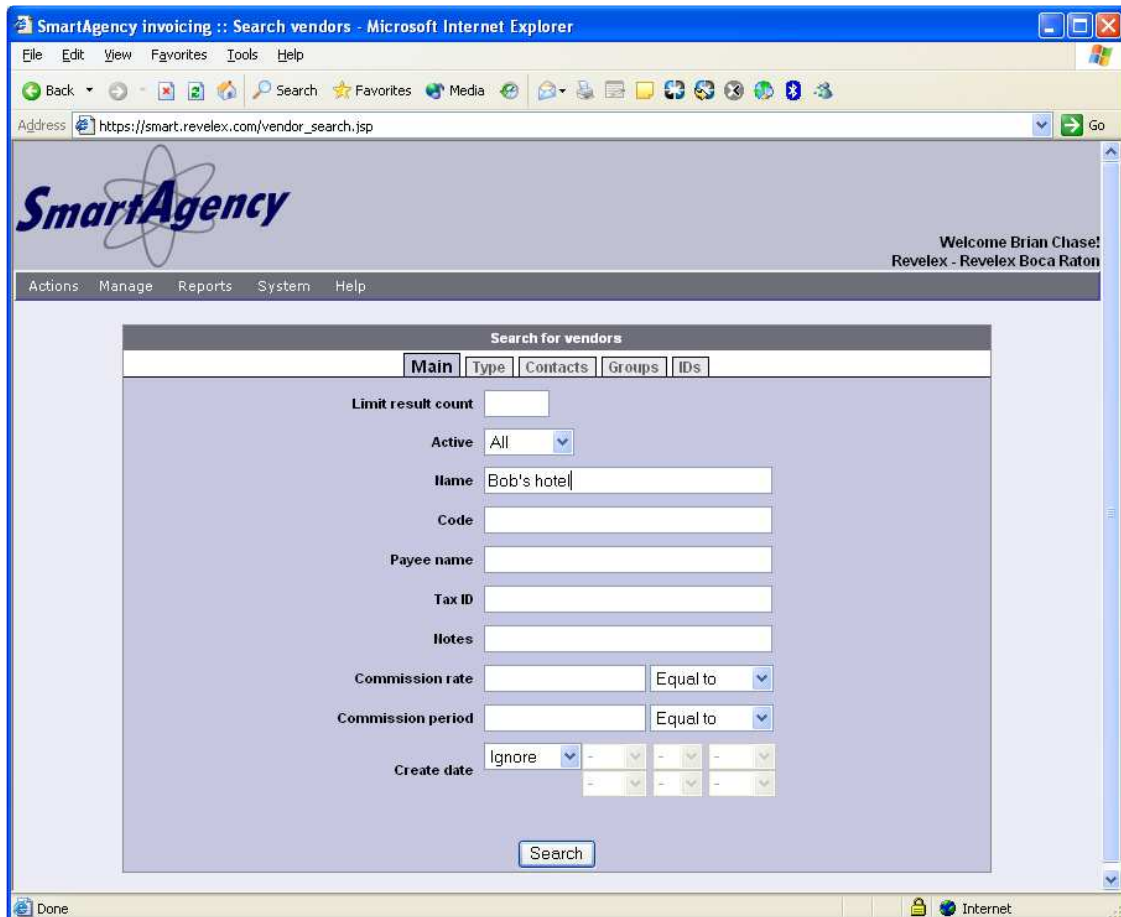
Set rate to all agencies

Save Delete Cancel

Setting individual vendor commissions

This section describes how to set commissions for a specific vendor. From the menu on top, choose Manage > Agents > Search

On the Main tab you can enter the name of the vendor to search for. You can also specify a travel type such as cruise, or hotel by clicking the Type tab.

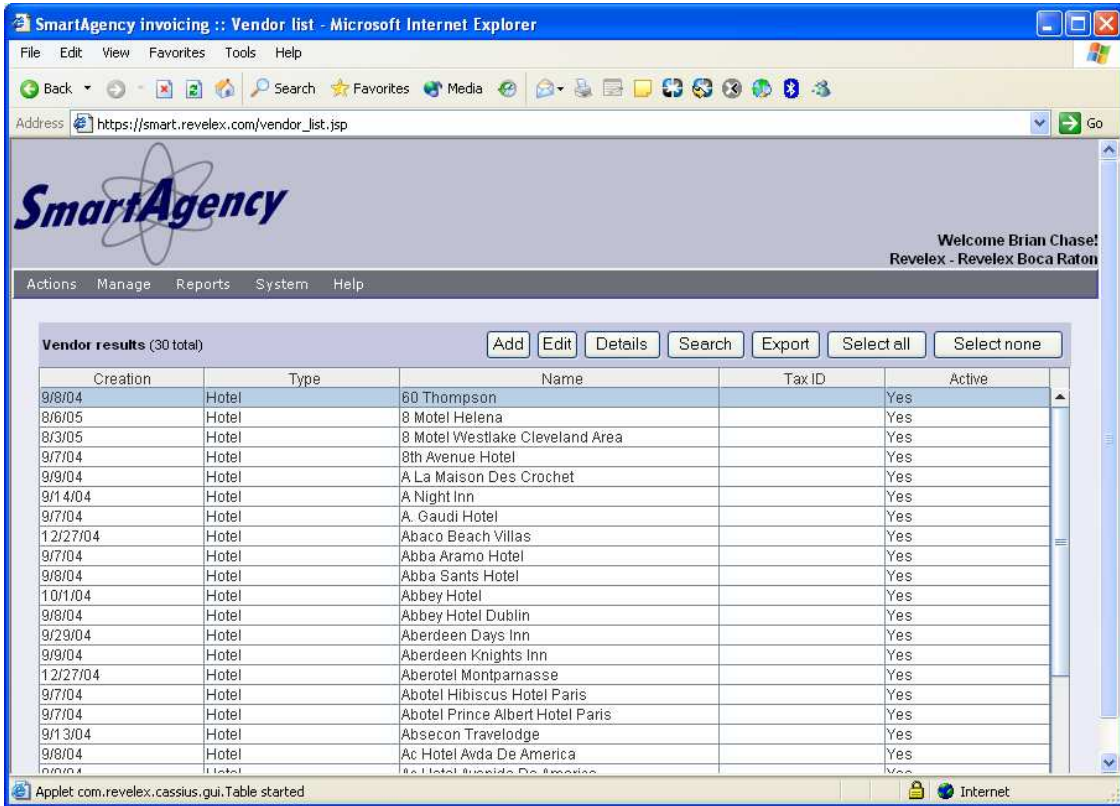


The screenshot shows a web browser window titled "SmartAgency invoicing :: Search vendors - Microsoft Internet Explorer". The address bar shows "https://smart.revelex.com/vendor_search.jsp". The page features the SmartAgency logo and a navigation menu with "Actions: Manage Reports System Help". A "Welcome Brian Chase! Revelex - Revelex Boca Raton" message is visible in the top right. The main content area is titled "Search for vendors" and contains several tabs: "Main", "Type", "Contacts", "Groups", and "IDs". The "Main" tab is active, displaying a search form with the following fields:

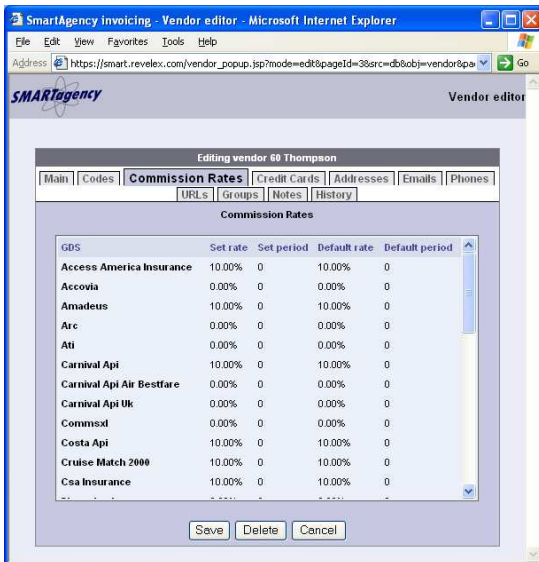
- Limit result count:
- Active:
- Name:
- Code:
- Payee name:
- Tax ID:
- Notes:
- Commission rate:
- Commission period:
- Create date:

A "Search" button is located at the bottom of the form.

After the search, you will see a list of vendor search results.



From the list, select the vendor you wish to modify and then click the Edit button above the list. You will then see the vendor editor screen.



A vendor's commission rates are associated with the GDS of a booking. The first column on this screen lists the available GDS. The second column shows the specific commission amount (Set rate) and the fourth column shows any default commission value (Default rate). When you set a commission in this area, it will become the 'Set rate', which always overrides the 'Default rate'. The default rate is described earlier in this chapter.

To add or edit a specific commission rate for the vendor you are editing, click on the GDS name in the list. For example, if you want to assign a 20% commission for Amadeus, click on Amadeus in the list. You will see the commission editor screen.

Rate – This is the commission amount to assign

Percent – When this is checked, the rate will be a percentage of the sale. Otherwise rate will be a flat dollar amount.

Once you set the commission, click the save button on the Commission Rate screen. You can add additional commissions to the agent by clicking on the Invoice type name.

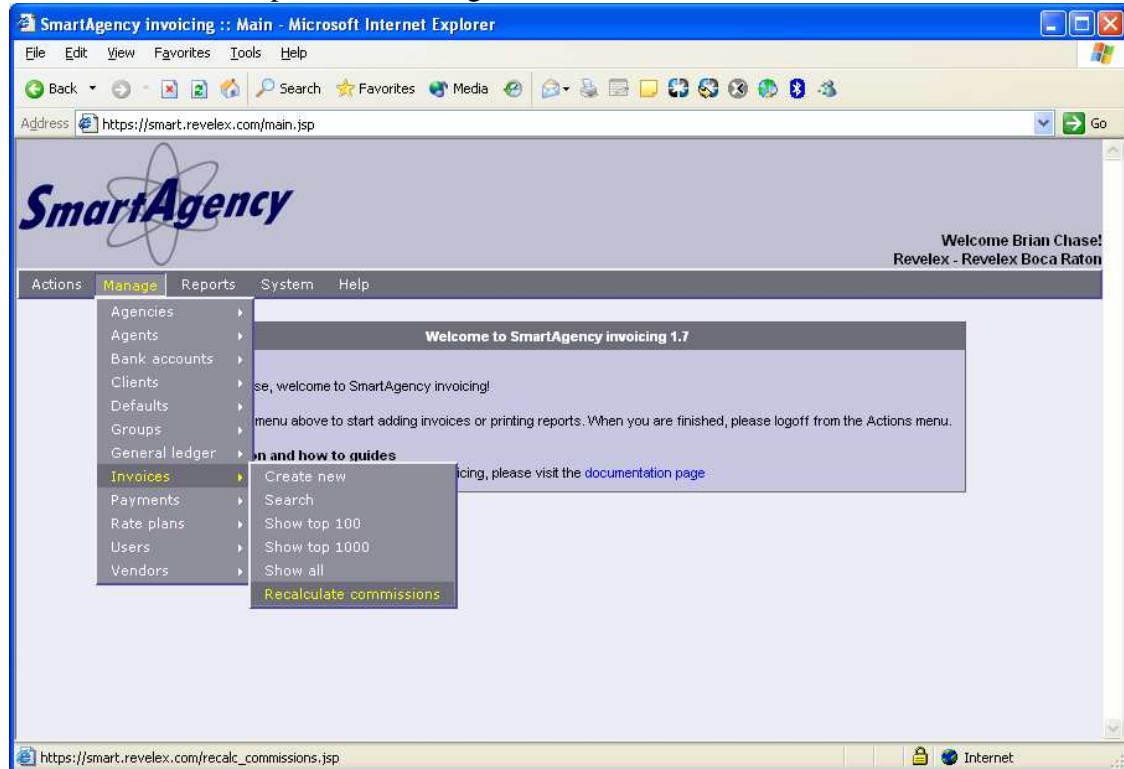
When you are done **you must click the Save button on the vendor editor screen** as well.



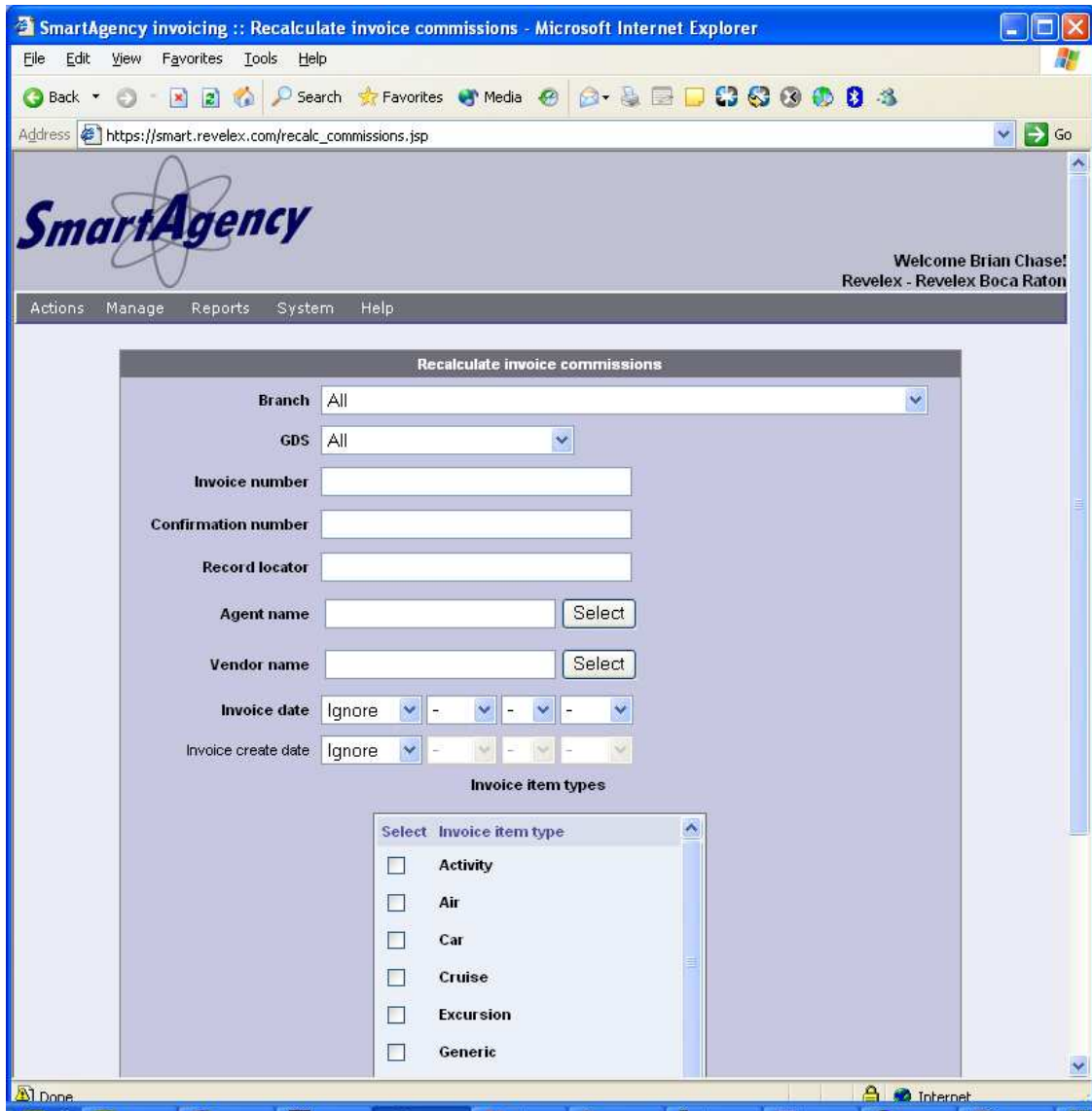
Recalculating commissions

This section describes how to recalculate the commissions for invoices already in the system.

From the menu on top, choose Manage > Invoices > Recalculate commissions



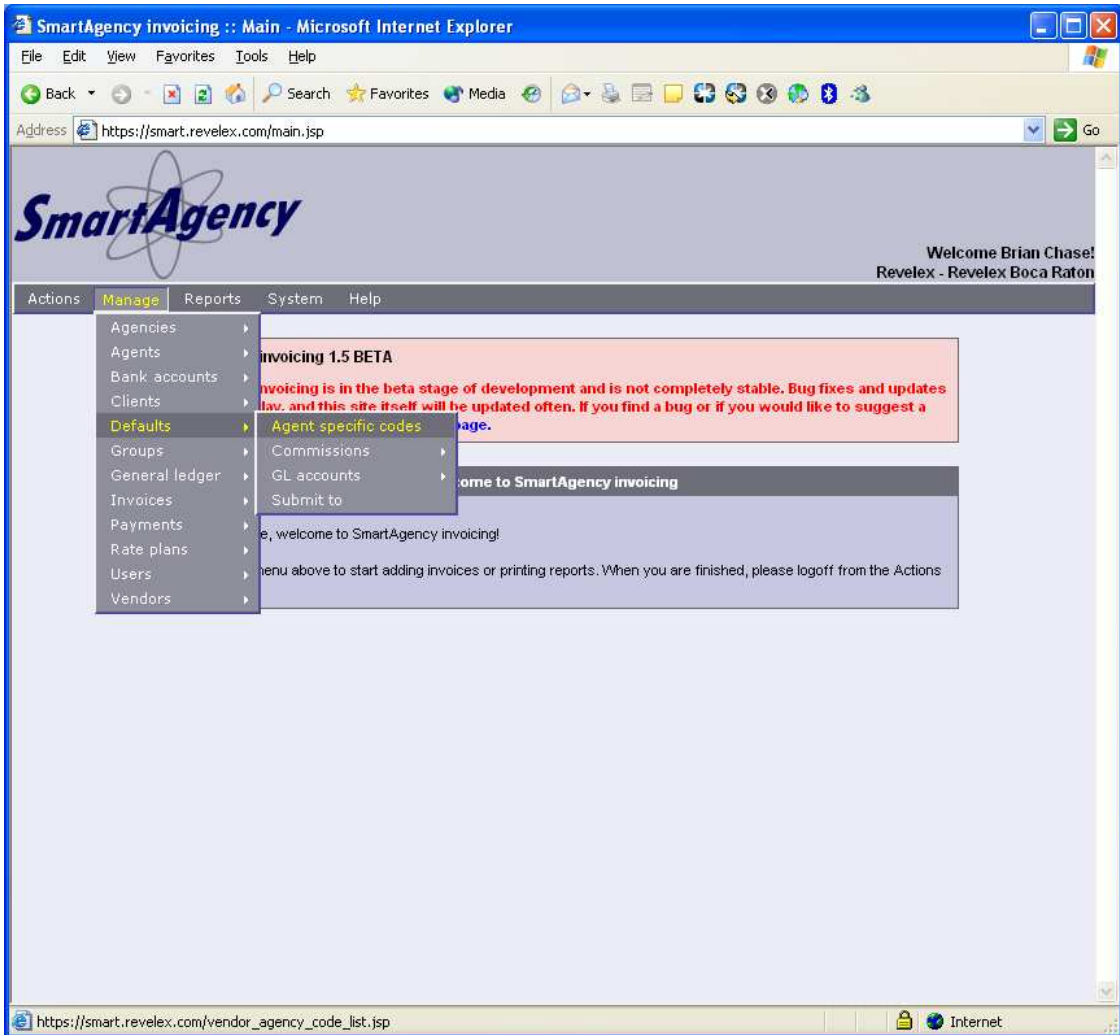
This section is under construction, please contact Revelex for assistance.



Agency specific codes screen

The agency specific codes screen will allow you to create your own custom codes for exporting. This feature is currently only available for custom Globalware exports and can be extended upon request.

From the menu on top, choose Manage > Defaults > Agent specific codes



Agency specific codes list

Agency specific codes are listed in a table. From this screen you can click the add button to create a new entry or you can highlight an entry for editing or deleting.

SmartAgency invoicing :: Agency specific vendor codes - Microsoft Internet Explorer

Address: https://smart.revelex.com/vendor_agency_code_list.jsp

Welcome Brian Chase!
Revelex - Revelex Boca Raton

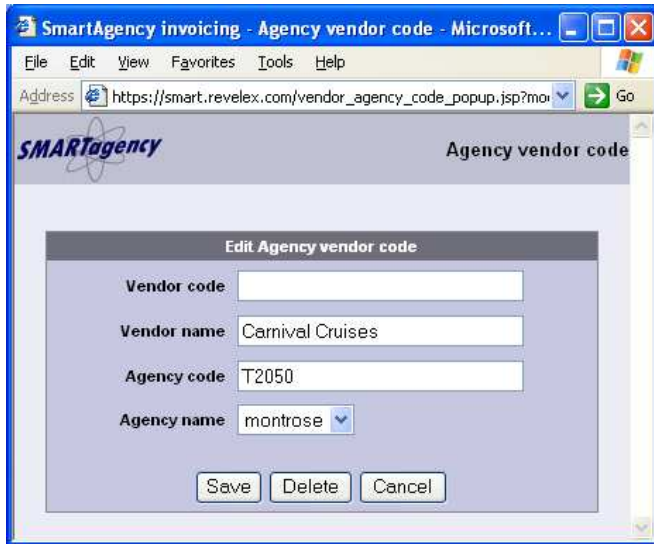
Actions Manage Reports System Help

Agency vendor code results (564 total)

VendorName	VendorCode	AgencyCode	AgencyName
CRAIG LUNDGREN HBA	IC1007	LEVEL1	montrose
TONYA DENMARK HBA	IC1011	LEVEL1	montrose
TARESA RICHMOND-CASADOS HBA	IC1012	LEVEL1	montrose
Serena Burnett - HBA	IC1016	LEVEL1	montrose
DAVID SEEBERGER HBA	IC1017	LEVEL1	montrose
DEANNA BAUER HBA	IC1018	LEVEL1	montrose
CAROL WILLIAMS HBA	IC1019	LEVEL1	montrose
JUDY PACZKOWSKI HBA	IC1020	LEVEL1	montrose
JAMES THORNSBERRY	IC1023	LEVEL1	montrose
RICHARD CHINGOMBE	IC1024	LEVEL1	montrose
AURELIA CRUZ HBA	IC1025	LEVEL1	montrose
JEFF O'MALLEY	IC1026	LEVEL1	montrose
HBA SONYA STOJANOVSKI	IC1028	LEVEL1	montrose
MISTY POARCH HBA	IC1029	LEVEL1	montrose
DANNY WILLIAMS HBA	IC1030	LEVEL1	montrose
PAUL PAKUSCH HBA	IC1031	LEVEL1	montrose
DENISE CLAY HBA	IC1032	LEVEL1	montrose
ERIC SHIERS	IC1033	LEVEL1	montrose
LIDIA MORRISON	IC1034	LEVEL1	montrose
PETER OSBORNE	IC1037	LEVEL1	montrose
Andrea Markus-O'Grady	IC1005	LEVEL2	montrose
John Grenier HBA	IC1008	LEVEL2	montrose
JEAN TOH HBA	IC1009	LEVEL2	montrose
ENID LEUNG HBA	IC1010	LEVEL2	montrose
VERONICA COVINGTON-HBA	IC1014	LEVEL2	montrose
KAREN JACKSON- HBA	IC1015	LEVEL2	montrose
LORI PELANTAY HBA	IC1021	LEVEL2	montrose
LINDA DAMON	IC1022	LEVEL2	montrose

Applet com.revelex.cassius.gui.Table started

There are two variations of using this list. One method is to supply only the vendor name. This is a weaker approach to using the system because vendors will be matched by name and can fail depending on the vendor name used by Revelex's GDS connections. The other approach is to supply the vendor name and vendor code. This strengthens the matching process but can also fail based on the vendor code used by Revelex's GDS connections.



The screenshot shows a web browser window titled "SmartAgency invoicing - Agency vendor code - Microsoft...". The address bar contains the URL "https://smart.revelex.com/vendor_agency_code_popup.jsp?mo...". The page header includes the "SMARTagency" logo and the text "Agency vendor code". The main content area is a form titled "Edit Agency vendor code" with the following fields:

Vendor code	<input type="text"/>
Vendor name	Carnival Cruises
Agency code	T2050
Agency name	montrose

At the bottom of the form are three buttons: "Save", "Delete", and "Cancel".

You can also place multi purpose codes in the list. In this example, STI value IC1039 will be used to lookup a name of EMERALD BOLDEN and a code of LEVEL2.



The screenshot shows the same web browser window as above, but with the following values entered in the form fields:

Vendor code	IC1039
Vendor name	EMERALD BOLDEN
Agency code	LEVEL2
Agency name	montrose

The "Save", "Delete", and "Cancel" buttons are still present at the bottom of the form.