Agent Reporting

Introduction

Questions about agent reports are among the most common questions received on the support desk. This document is a quick reference guide to produce the most frequently requested agent reports.

There are several different places from which agent reports can be run:

- Canned agent reports (Under Reports|Agent)
- Client and vendor balance core reports sorted by agent (Under Reports|Core)
- Customized reports created in the report generator (Under Reports|Report Generator|Print **Report**)
- Trams Crystal Reports that can be downloaded from our web site, www.sabretravelnetwork.com/trams)

This document specifically discusses the canned agent reports in Trams Back Office, but all agent reports depend on the quality of the agent information entered on the sales invoice. First, we'll discuss how agents are assigned to invoices.

Section 1: Assigning Sales Agents to Invoices

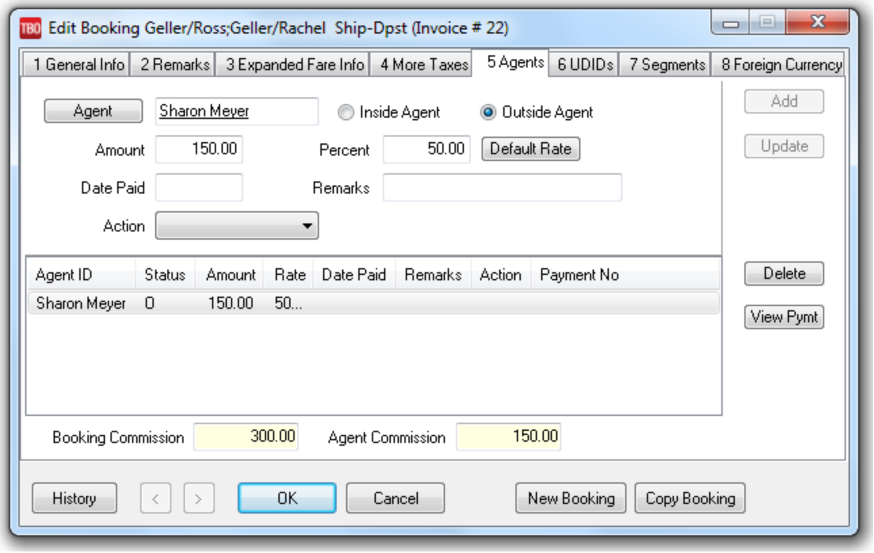
Sales agent reports, like all other reports in TBO, depend on the quality of the data entered. There are different ways of assigning agents to invoices. The first and most common is to have your reservation system assign the agent for you. When you interface the invoice records, the agent who ran the invoice will be automatically added as the invoice agent.

You can add additional inside or outside agents by adding the necessary interface codes. (See your Interface Reference Guide or the TBO Help File for the exact formats required.) The sales agent information can also be added and updated manually in the invoice booking record. There is also a way to have an agent automatically assigned to a client's invoice based on their client profile.

Manually Adding or Modifying an Invoice Agent

Each invoice booking record has an ***Agents*** tab. This is where the details for the agent responsible for the booking are stored. TBO can track the agent's inside/outside status as well as the commission split, or the amount the agent earned on this booking.

The Booking Agent Screen



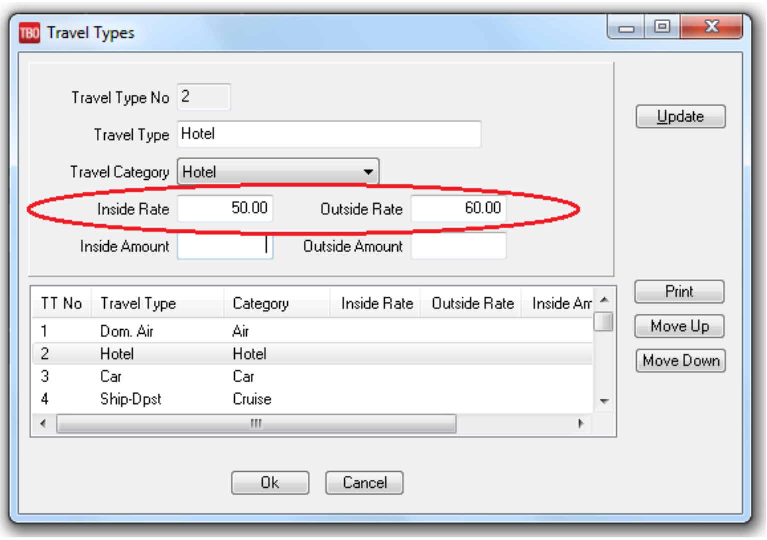
Agent Name	This links the booking with the agent's profile. You can type part or all of the agents name in the text box, or you can click on the button labeled ***Agent*** and perform a more in-depth search.
Inside/Outside Status	The status can be used for reporting and to determine the agent's commission split.
Amount	The amount of the commission the agent earned for this booking. It can be entered as a dollar amount in this field or entered as a percentage in the ***Percent*** field.
Percent	The percentage entered in this box will automatically computer the amount the agent has earned on this booking.
Default Rate	Clicking the ***Default*** rate button will automatically enter the agent's default commission in the ***Percent*** field.
Date Paid	The date on which the agent was paid his or her commission. The date is automatically filled in during ***Agent Reconciliation*** or it may be manually entered.
Remarks	Any remarks about this particular commission. These will print on agent statements.
Action	The action this agent took on this booking. Agencies may choose to track whether an agent was the ***booking*** or ***ticketing*** agent in the GDS. Alternatively, the field may be left blank. This can be used for reporting.

Agent Commission Rates

Default commission rates can be setup globally, on a per-agent basis, or based on a client's profile.

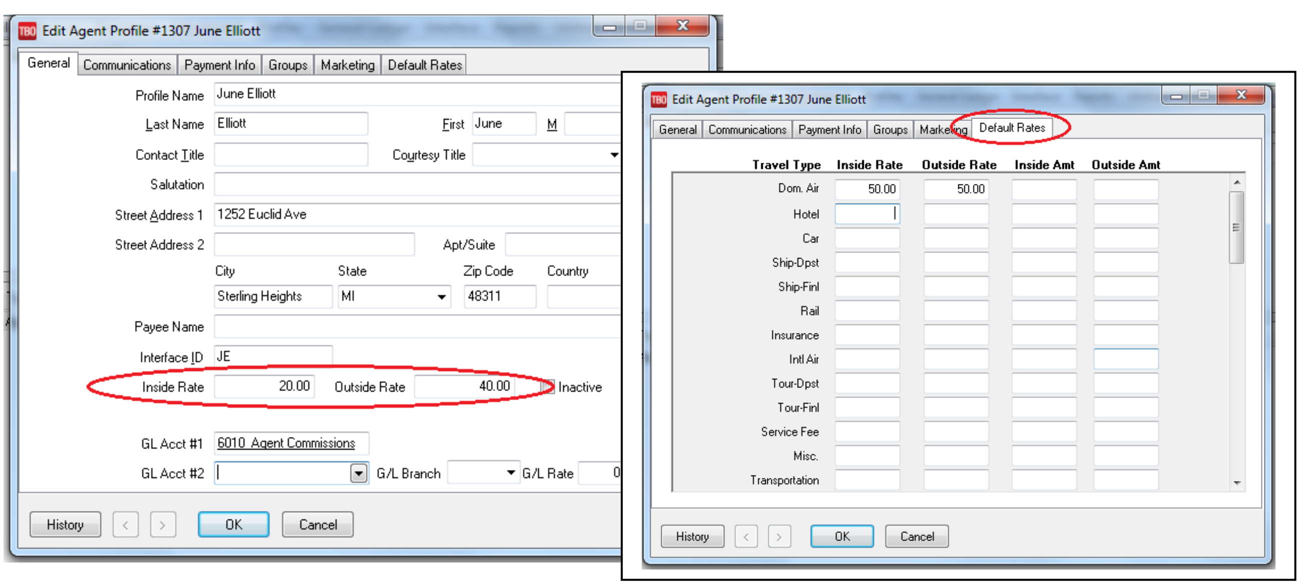
Commission Rates Based on Travel Type

Agent commission rates can be configured based on travel type. They are assigned in the **Global Defaults|Setup|Travel Types** window.



Commission Rates Based on Agent

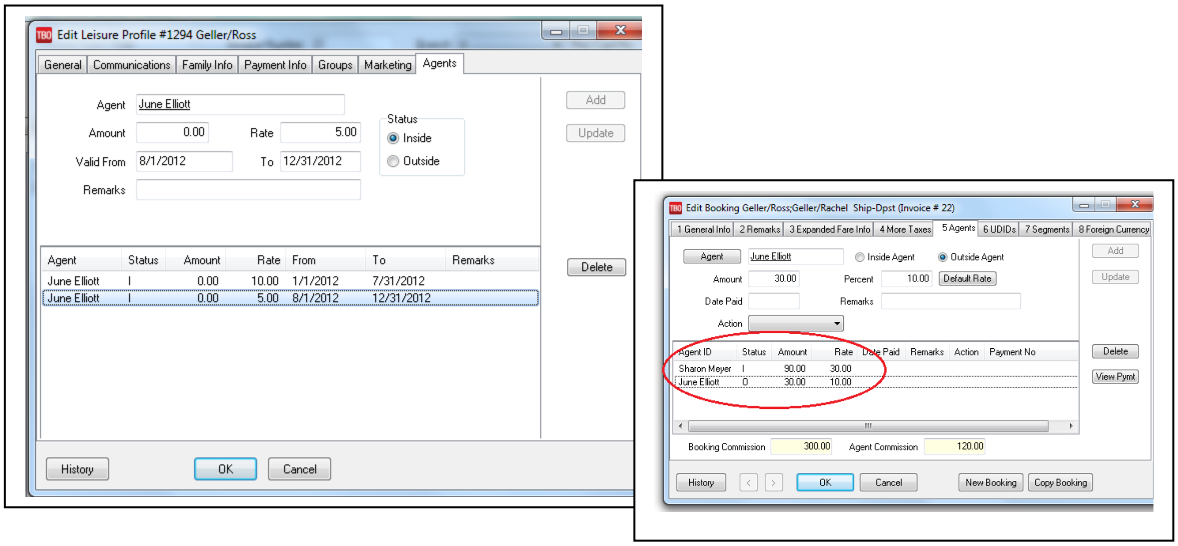
The default commission rate for an agent is stored in the agent's profile. There are fields for tracking the inside and outside rate for that agent. If an agent does not process sales as an inside agent, leave that amount blank and enter a default only in the ***Outside Rate*** field.



Alternatively, an agent's commission rate can be based on travel type by choosing the ***Default Rates*** tab in the agent profile.

Automatically Assigning Agents to Specific Clients

While agents are generally assigned by the reservation system, agents can also be assigned to a client's profile. This is useful if an agent is to get credit for all of a particular client's bookings regardless of who actually issued the invoice.



If you enter an agent in the client profile, this agent is automatically added to any invoice assigned to clis client. The agent listed here is added ***in addition*** to any agent that is automatically assigned through interface. The major advantage for this is that you can assign certain commission amounts for certain dates.

> *Example: Your payment agreement with agent June Elliott calls for her to make 10% commission on all bookings for Ross Geller between January 1 and July 31, 2012, and then 5% for bookings made between August 1 and December 31, 2012. You can include this information in the client profile and TBO track the payment scale for you. Just remember that any agent entered in this box is added* **in addition** *to any agent assigned through interface or ClientBase. Therefore, if June Elliott is assigned to this profile with 10% commission and another agent, Sharon Meyer, who earns 30% commission, issues an invoice for Ross Geller, the booking will show two agents: Sharon Meyer at 30% and June Elliott at 10%. That means the agents would be earning a total of 40% of the total commission.*

How Rates are Calculated

TBO calculates the agent's commission during interface in the following order:

1. If an Agent Rate has been specified at the booking level of the PNR, then that rate is entered into the agent tab of the booking screen during interface processing.
2. If ***no*** rate was specified in the PNR, then any rate by Travel Type specified on ***Default Rates*** tab of the agent's profile is used.
3. If ***no*** rate is specified in the ***Default Rates*** tab of the agent's profile, then the rate specified globally under **Utilities|Setup|Travel Types** screen is used.

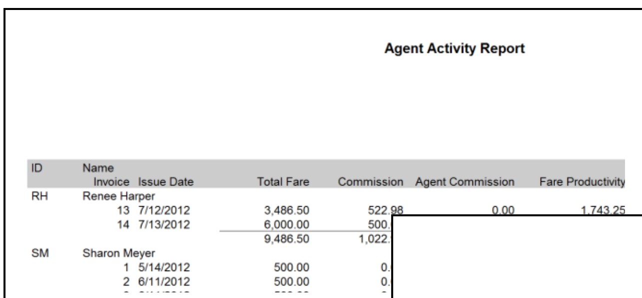
4. If there are ***no rates*** specified in the Default Rates Tab of the agent's profile or in the Utility|Setup|Travel Types file, then the default rates entered on the agent's profile's ***general information*** tab are used.

Note: These default tables, both in Utilities and in the Agent Profile, are only used during Interface Processing. When Manually entering bookings in Back Office, the system works if Inside and/or Outside Rates are entered on the "General Tab" of the Agent Profile, then those rates are used for whatever booking you are manually creating. If you want to assign a different rate based on Travel Type you just need to change the rate on the Agent Tab of the Booking Screen.

Section 2: Canned Agent Reports

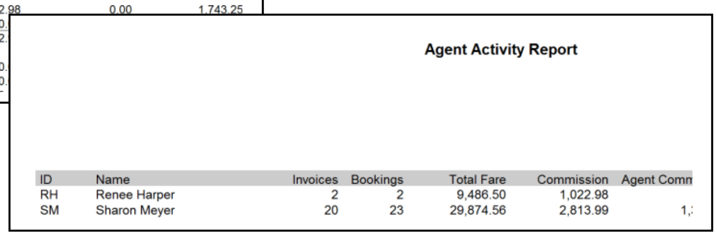
There are two types of canned agent reports in Reports|Agent - Agent Activity and Agent Statement.

The Agent Activity Report shows all agent activity for one agent or a group of agent on one report. You can change the report selection criteria to determine what type of invoices you would like to see on the report. For example, you might want to see all invoices created or only the invoices that have been paid.



Agent Activity Report

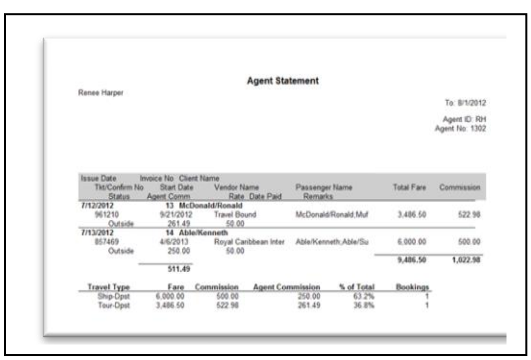
ID	Name / Invoice	Issue Date	Total Fare	Commission	Agent Commission	Fare Productivity
RH	Renee Harper					
	13	7/12/2012	3,486.50	522.98	0.00	1,743.25
	14	7/13/2012	6,000.00	500.	[illegible]	[illegible]
			9,486.50	1,022.	[illegible]	[illegible]
SM	Sharon Meyer					
	1	5/14/2012	500.00	0.	[illegible]	[illegible]
	2	6/11/2012	500.00	0.	[illegible]	[illegible]



Agent Activity Report

ID	Name	Invoices	Bookings	Total Fare	Commission	Agent Comm
RH	Renee Harper	2	2	9,486.50	1,022.98	
SM	Sharon Meyer	20	23	29,874.56	2,813.99	1,

The Agent Statement is a report run for a specific agent or a group of agents. Depending on what selection criteria you choose, you can run the report for all invoices created by the agent (or group of agents), or only those for which the agency has been paid.



Agent Statement

Renee Harper

To: 8/1/2012

Agent ID: RH
Agent No: 1302

Issue Date / Tkt/Confirm No / Status	Invoice No / Start Date / Agent Comm	Client Name / Vendor Name / Rate	Date Paid	Passenger Name / Remarks	Total Fare	Commission
7/12/2012	13	McDonald/Ronald				
961210	9/21/2012	Travel Bound		McDonald/Ronald,Mu[illegible]	3,486.50	522.98
Outside	261.49	50.00				
7/13/2012	14	Able/Kenneth				
857469	4/6/2013	Royal Caribbean Inter		Able/Kenneth,Able/Su	6,000.00	500.00
Outside	250.00	50.00				
					9,486.50	1,022.98
	511.49					

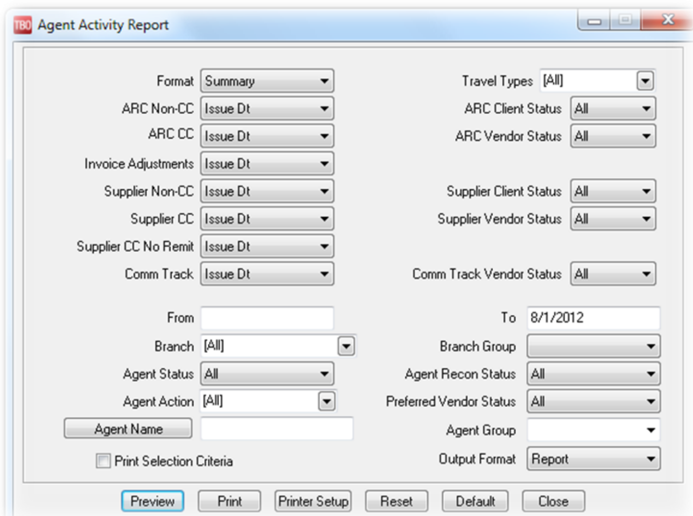
Travel Type	Fare	Commission	Agent Commission	% of Total	Bookings
Ship-Dpst	6,000.00	500.00	250.00	63.2%	1
Tour-Dpst	3,486.50	522.98	261.49	36.8%	1

Section 3: Using Selection Criteria

Sales agent reports, more than any other reports, depend greatly on the selection criteria entered when the report is run. This section lists the selection criteria needed to run agent reports in the most popular formats. The selection criteria are the same for either the **Agent Statement** or the **Agent Activity** report.

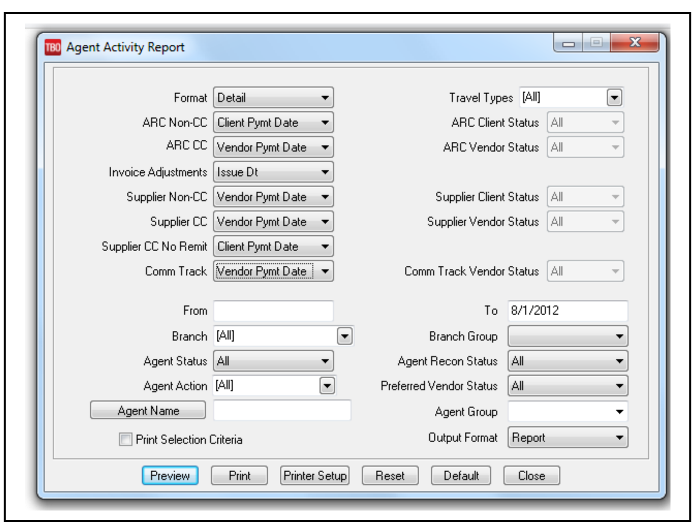
A Report Listing Everything Booked

The default selection criteria show all invoices. By not changing any of the settings, and only placing a date range, you get a report showing all the activity that agents have booked for that date range regardless of when either client or vendor payments are made.



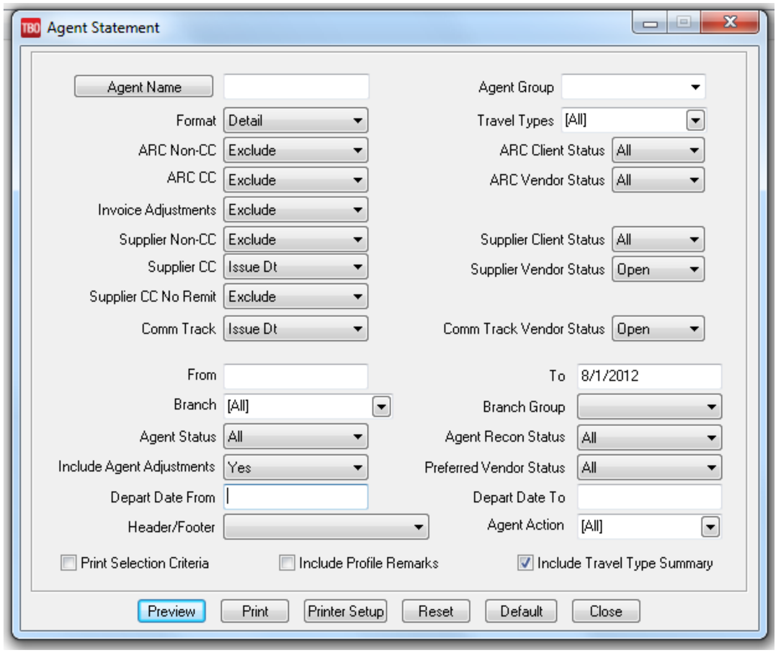
A Report Showing All Invoices Paid by Both Client and Vendor

If your agents are paid on a commission basis, you can produce a report using the following criteria. Feel confident that you are not paying an agent twice for the same invoice. This report does not look at when the invoice was created; rather it looks at the date the invoice was paid, either by the client (if the setting is Client Pymt Date) or by the vendor (if the setting is Vendor Pymt Date).



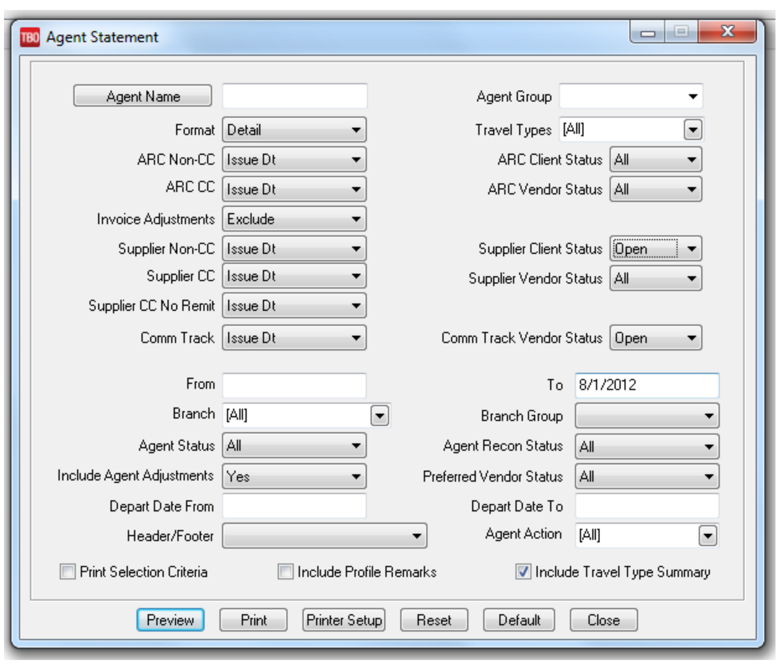
A Report For Outstanding Commissions

Using the following criteria, you can run a report for outstanding vendor commissions.

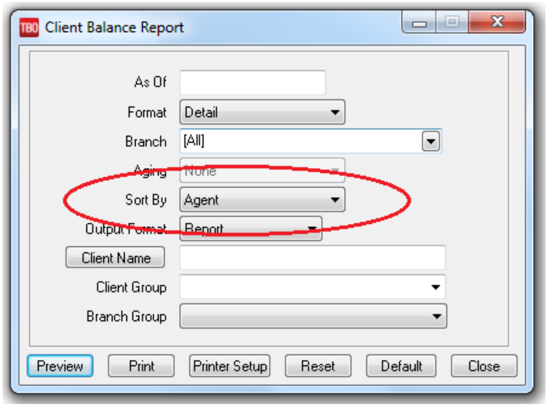


Notice the From date is blank, and To date should be the date you are running the report. This assures that you get all open invoices regardless of when they were created.

If you want to run the report to only see invoices that are open (unpaid) from client, for a specific agent run the agent statement with the criteria below:



To track open client invoices for all your agents there are two reports you can run. You can run the agent activity report with the above selection criteria. Or you can run the Client Balances Core report. Go to **Reports|Core|Client Balances** with the selection criteria:



Frequently Asked Questions

My outside agents are not appearing on my reports. What am I doing wrong?

More than likely, the outside agent is not being assigned when the record is being created in the front office. To add an outside agent to an invoice, your agents must add an OA entry to the record. (For the exact format refer to the interface reference guide for your reservation system).

Trams Back Office is assigning more than one agent to some of my invoices. Why?

This has to do with the agent field on the client profile. Remember, if you attach an agent to the profile, that agent is assigned to the invoice.

I am running an agent activity report for all of my agents. I have a number of invoices listed for no agent. How do I find out what invoice those are?

You are running the report with the format set to summary, set the format to detail and run the report again.