



# DAY 1 | AGENDA

## DAY 1 | TUESDAY | MAY 5

TRAINING TIMES	CONFERENCE C NEWBIE/BEGINNER	CONFERENCE B INTERMEDIATE
8:00 AM – 11:00 AM	Navigation Bar and Dashboards  Client, Traveler, Advisor, Supplier and Other Profiles  Trips and Reservations	2026 Release Review  2026 Roadmap  Q&A
5:00 PM – 7:00 PM	One-on-One Appointments	One-on-One Appointments

One-on-One room time slots open for all training times – Place TBA



# DAY 2 | AGENDA

## DAY 2 | WEDNESDAY | MAY 6

TRAINING TIMES	CONFERENCE C ADVISOR BEGINNER	CONFERENCE B BACK OFFICE BEGINNER
8:00 AM – 9:00 AM	Reservation Import: Direct Connect, Cruise Itinerary, AI Hotel Import	Supplier Payments and Vouchers Reapply Payments
9:15 AM – 10:15 AM	Payments/Trip Payment Authorization	Other Payment, Duplicate Payments, Void Payments, Payment on Agency Credit Card
10:30 AM – 11:30 AM	Trip Statement/Client Itinerary	Advisor Pay Reconciliation
<b>BREAK   11:30 AM - 1:00 PM</b>		
1:00 PM – 2:00 PM	Actions and Action Plans	Agency Credit Card Reconciliation
2:15 PM – 3:15 PM	Templates: Email and Document Authorization	Commission Pay Reconciliation
3:30 PM – 5:00 PM	Views/Reports (EVERYONE IN ONE ROOM)	



# DAY 3 | AGENDA

## DAY 3 | THURSDAY | MAY 7

TRAINING TIMES	CONFERENCE C ADVISOR INTERMEDIATE	CONFERENCE B BACK OFFICE INTERMEDIATE
8:00 AM – 11:00 AM	<u>Efficiencies</u> Move Reservation/ Duplicate Trips  Using Dashboards and Reports  How to use email templates effectively	Setting Up General Ledger  Bank Management
10:00 AM – 11:00 AM	Q&A	Q&A
6:00 PM – 7:00 PM	Wrap-Up and Thank You	