

# Travel Agent Portal Guide

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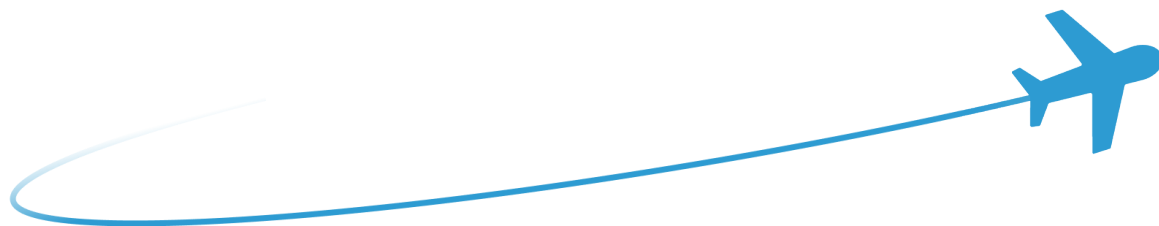
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## Introduction

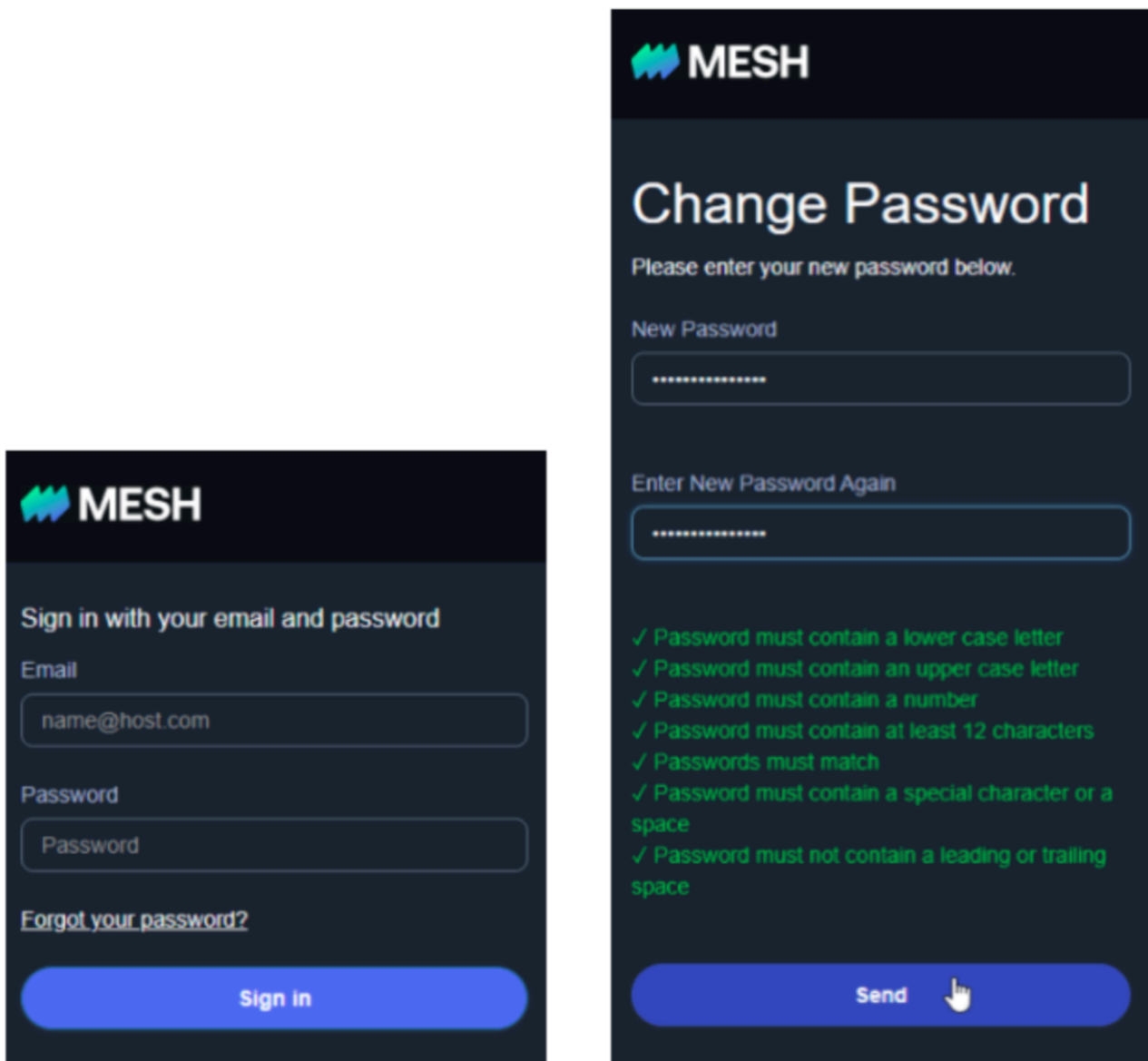
Welcome to the Mesh Agent Portal, your hub for effortlessly providing a wide range of trip options to travelers using the Mesh Platform.

We have prepared this guide to help you kickstart your journey with Mesh, and we hope you find it useful.

We're thrilled to partner with you and look forward to this exciting journey together. If you have any questions, please contact our team at [support.tmc@meshpayments.com](mailto:support.tmc@meshpayments.com).

## Logging in for the first time

The Mesh platform will send you an email with a relevant URL and a text message with a temporary password. Use these shared credentials to log in for the first time and follow the platform's directions to change your password.



Moving forward, your email and the new password you set will be your credentials for the Mesh agent portal. If you forget the password please click the 'Forget your password?' link and follow the instructions.

## Logging In/Out

The Mesh Agent portal is your primary hub for all interactions with our mutual customers. Click the following [URL](#) and bookmark it for future reference.

To **log in**, enter your credentials and input a six-digit MFA code.

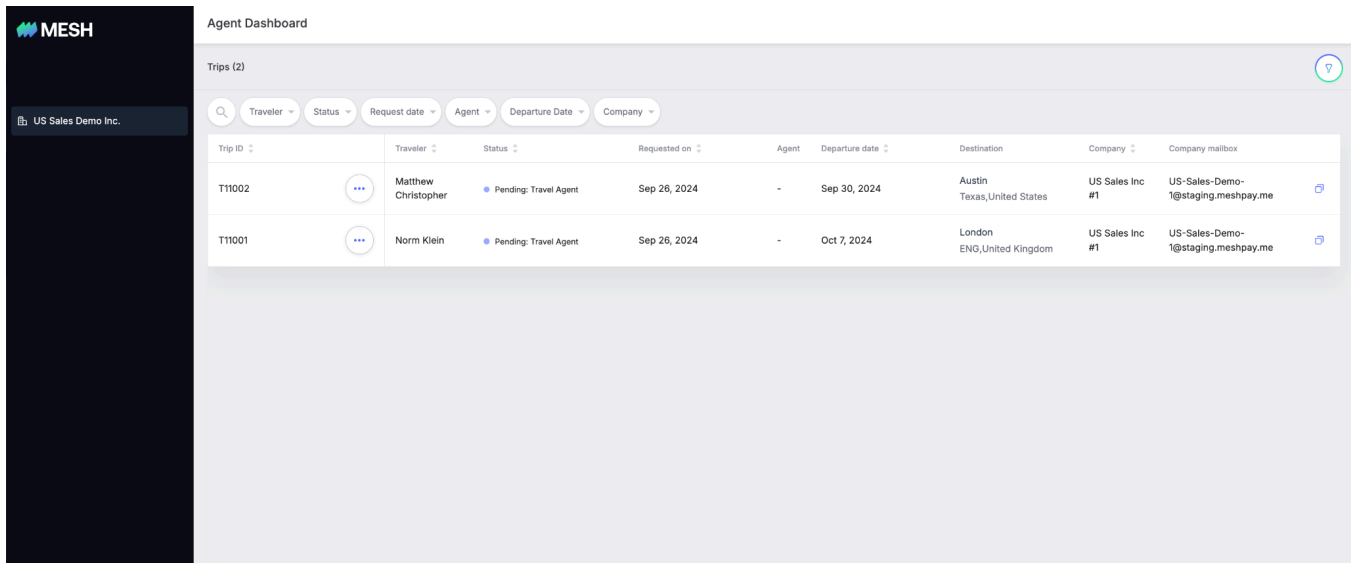
To **log out**, navigate to the bottom left corner, click your name, and click logout.

### Notes:

- The authentication expires after 24 hours, and you must log in again.
- Contact us if you need to change the phone number where we send your MFA code.

If authenticated successfully, you will gain access to the Agent portal.

The screenshot below depicts the portal's simple and intuitive user interface.



When your Agent profile is created in the Mesh backend, we add the company or companies you will service. The navigation bar on the left-hand side will display those companies. If you need to support additional companies, a Mesh representative will add them to your profile.

The table on the right displays the details of the requested trips and it includes the following columns:

1. Trip ID,
2. Traveler,
3. Status (e.g., pending, approved, declined),
4. Request date,
5. Assigned Agent,
6. Departure date,
7. Destination,
8. Company name (from which the request originated),
9. Company mailbox (for sending relevant documents, such as invoices or receipts).

**Notes:**

- You can sort the data displayed and use the filters to locate a specific trip.
- The agent's column is initially 'blank'. The column will present information on whether the trip was assigned to an agent or after an agent made changes to an assigned trip. Visit [this section](#) to learn how to assign a trip request to an agent.
- The Mesh platform will also send agents an email notification for each trip request. When you click the '**Start booking**' button, Mesh will take you directly to the specific trip option page. While you can use this method to provide options, we strongly recommend logging into the Mesh agent portal, locating the relevant trip, and clicking it to add options. This approach helps streamline the service you provide to your customers.

## Adding trip options

When agents click on a trip they are directed to the trip request page. The page is divided into three sections: **Traveler Details**, **Request Summary**, and **Options**. The data displayed originates from the trip request on the Mesh platform.

Trip request for John Roberts [Fintech Voyages Inc. ] [T11228] Pending: Traveler (John Roberts)

### Traveler Details

First name (Given name)	John
Middle name	-
Last name (Surname)	Roberts
Gender	Male
Phone No.	+12012149678
Email address	noam.koren+JR@meshpayments.com
Travel Policy Group	Default (All employees)

### Passport details

Passport No.	123456789
Date of issue	May 2, 2017
Expiration date	May 5, 2027
Date of birth	Feb 1, 1996
Authority	United States
Nationality	American

### Airline Preferences

Seating preference	Window
Meal preference	Regular
Additional preferences	-

### Flight to Austin

New York City, United States → Austin, United States, Morning of Jul 8, 2024  
Austin, United States → New York City, United States, Evening of Jul 12, 2024

Notes to agent  
-

[+ Add option](#)

---

### Hotel in Austin (4 nights)

From: Jul 8, 2024 To: Jul 12, 2024

Notes to agent  
-

[+ Add option](#)

### Request summary

New York City, United States → Austin, United States (Jul 8, 2024)  
Austin, United States → New York City, United States (Jul 12, 2024)

Time off  
**No time off requested**

Reason for the trip  
-

Additional comments  
-

[Submit Changes](#)

### Notes:

- The **Traveler details** section includes the **Travel Policy Group** (e.g., All employees, directors, CXO, etc.) which affects the budgets provided to the traveler and the 'out-of-policy' related messages.
- The **Request summary** section may include additional information such as values of custom fields (e.g., department) entered by the Traveler or the Travel Manager.
- The **Options** section displays flights, hotels, and **additional options** if added.

## Adding flight options

A flight option quote includes the following required fields: **date/time** validity, **details** (i.e., PNR data from GDS), **PNR code**, **PNR source** (e.g., Sabre), **cost** (i.e., amount, taxes, and currency), **cancellation policies** with relevant fees, and optional **remarks**.

**Note:** You can not import trip options directly from the Global Distribution System (GDS) because there is no connectivity between the Mesh Agent portal and the GDS.

To add a flight option click on the '**Add option +**' button under the flight section, add the relevant data, and click the '**Save**' button.

If the option is added properly, it will appear under the flights section.



### Flight to New York City


Vancouver (YVR) → New York City (LGA), Jun 29, 2024



New York City (LGA) → Vancouver (YVR), Jul 8, 2024

Notes to agent

-

#### Option #3

 Expires in 11 h : 49 min


 Jul 8, 2024 United Airlines, Inc.	06:30 AM - 03:25 PM YVR - LGA	5h 55m Direct	Economy (B)
 Jul 12, 2024 United Airlines, Inc.	06:20 PM - 08:30 PM LGA - YVR	5h 10m Direct	Economy (B)






Total: **1,000.00 USD**

Exceeds the 1000 USD limit

#### Option #4

 Out of policy

 Expires in 11 h : 49 min

 Jul 8, 2024 American Airlines	06:40 AM - 03:30 PM YVR - LGA	5h 50m Direct	Economy (B)
 Jul 12, 2024 American Airlines	06:40 PM - 08:45 PM LGA - YVR	5h 5m Direct	Economy (B)



Total: **1,400.00 USD**






The above options originated from the following PNR 'cut & paste'.

Option 3	1 UA 100 B 08JUL 1 YVRLGA*SS1 0630 1525 /E 2 UA 200 B 12JUL 1 LGAYVR*SS1 1820 2030 /E
Option 4	1 AA 250 B 08JUL 1 YVRLGA*SS1 0640 1530 /E 2 AA 350 B 12JUL 1 LGAYVR*SS1 1840 2045 /E

**Note:** The bottom option includes an **out-of-policy** flag to indicate that the amount exceeds the budget set in the **flight policy** for this **Travel Policy Group**.


If you encounter an error message, review the PNR itinerary details and correct them. If the error persists, contact our team at [support.tmc@meshpayments.com](mailto:support.tmc@meshpayments.com).

 Application Error, Please click on edit or delete  


**Note:** The bottom part of the form includes a clickable link named '+ Add Quote'.

- [+ Add Quote](#)


---

-  Add flight


---

-  Seats


---

-  Luggage

---

-  Upgrades

---

-  Fee

---

You can add a quote for a flight (e.g., bundle multiple one-way flights into a single option), a seat upgrade, a luggage fee, any other type of upgrade, and any miscellaneous expenses. When adding such a quote enter the amount, the currency, and relevant remarks.

Quote #2



Amount

Enter amount

Currency

Select...





Remarks (optional)




Remember to click '**Save**' when you finished adding all the quotes.

Click on the option to view a detailed breakdown of the associated costs.

**Option** Expires in 09 h : 18 min

---

	Jul 8, 2025 United Airlines, Inc. EWR - AUS	06:40 AM - 09:30 AM Direct	3h 50m	Economy (B)
	Jul 12, 2025 United Airlines, Inc. AUS - EWR	06:40 PM - 10:45 PM Direct	3h 5m	Economy (B)

  **Total: 2,974.00 USD**

Option

09 h : 13 min

Flights

Total	<b>2,974.00 USD</b> ^
Upgrade fee Economy → Business	1,500.00 USD
Seat fee Economy Premium	100.00 USD
Additional fee Lounge entrance fees	99.00 USD
Luggage fee An additional suitcase	75.00 USD
EWR → AUS → EWR (12345)	1,200.00 USD

United Airlines, Inc. | Jul 8 (Direct) | Economy (B)

---

06:40 AM ————— 09:30 AM  
EWR 3h 50m AUS

United Airlines, Inc. | Jul 12 (Direct) | Economy (B)

---

06:40 PM ————— 10:45 PM  
AUS 3h 5m EWR

To **add** more options, click the '**+ Add option**' link. Add all the relevant details, as discussed above, and click **save**.

**Note:** Submit changes, edit, clone, and delete options will be discussed later.

## Adding hotel options

A hotel quote includes the following fields: **date/time validity** (optional), **details** (reference # and source), **name of the hotel**, status (i.e., OK, request, waitlist, unable to confirm), **check-in/out date/time** (auto-populated from the trip request: time is optional), **basis** (e.g., B&B, Full, all-inclusive), **cost** (i.e., amount, taxes, and currency), **refund and cancellation policies** with relevant fees, and optional **remarks**.

To quote a Hotel click on the '+ **Add option**' under the hotel section, add the relevant data, and click the **Save** button. If the option is added properly, it will appear under that section.



### Hotel in New York City (9 nights)

From To  
Jun 29, 2024 Jul 8, 2024

Notes to agent

Exceeds the nightly limit of 350 USD


Option #1  Out of policy

 Hilton Jun 29 - Jul 8, 9 nights



Total: **5,400.00 USD**  
600 USD per night

Option #2

 Expires in 11 h : 42 min

 Marriott Jun 29 - Jul 8, 9 nights



Total: **1,400.00 USD**  
155 USD per night

Note: The top option includes an **out-of-policy** flag to indicate that the amount exceeds the budget set in the **hotel policy** for this **Travel Policy Group**.

**Note:** The bottom part of the form includes a clickable link named '+ Add Quote'.

[+ Add Quote](#)



 Add hotel

 Upgrades

 Fee

You can add a quote for a hotel (e.g., bundle multiple hotels into a single option), any other type of upgrade, and any miscellaneous expenses. When adding such a quote enter the amount, the currency, and relevant remarks. Remember to click '**Save**' when you finished adding all the quotes. Click on the option to view a detailed breakdown of the associated costs.

**Option**

 09 h : 05 min 

**Hotels**



Total		<b>1,700.00 USD</b> 
Additional fee		200.00 USD
Pass to Lounge		
Marriott	(54321)	1,400.00 USD
Upgrade fee		100.00 USD
Non-smoking room		

**Marriott** 1,400 USD  
 Jul 24 - Jul 31 (7 nights) 200 USD / night

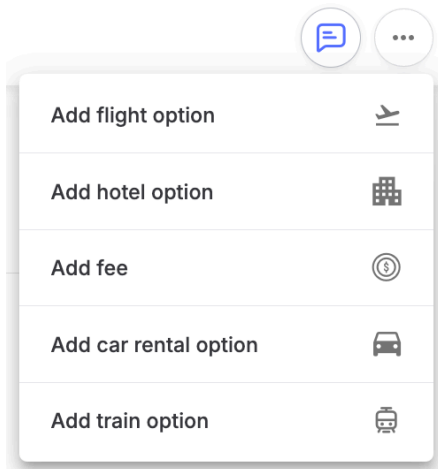
Reservation Status Basis  
 Request Bed & breakfast

**Cancellation policy**

 Nonrefundable

## Add more options

The upper right corner of the UI includes an ellipsis that allows you to add **more** options.



Consider the following scenario. A traveler, prioritizing flight arrangements, initially requested a trip with quotes for flights only. After approval from all parties, the trip was issued with the quoted flight, and then, the traveler contacted you to request more options (e.g., hotel, car rental, train, fees, etc.).

- **Flight option:** Add relevant info. The section includes components discussed [here!](#)
- **Hotel option:** Add relevant info. The section includes components discussed [here!](#)
- **Car rental:** Add relevant info. Select the car rental company, car category, and pickup/drop-off dates, then enter the cost and refund policy. Optional fields include the pickup/drop-off time and tax.
- **Train:** Add relevant info. Select the departure and arrival cities and the date and time, and enter the cost and refund policy. Optional fields include the railway company, station name, tax, and additional remarks.
- **Fees:** Quote additional fees such as cancellation, change, and handling.

The quoted options will appear under flights and hotels in the '**Additional Options**' section.



### Additional options

#### Option (Car rental)



Pick-up	Newark	Aug 30, 2024
Drop-off	Newark	Aug 31, 2024



Total: **150.00 USD**

#### Option (Train)



Departure	Philadelphia	Aug 30, 2024, 6:00 AM
Arrival	Newark	Aug 30, 2024, 11:00 AM



Total: **180.00 USD**

#### Option

Handling fee



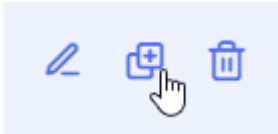
Total: **50.00 USD**

[+ Add option](#)

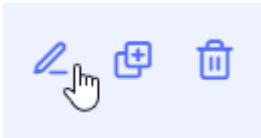
**Note:** When adding the mentioned options, it is a good practice to convey the action taken to the traveler via the Mesh in-app messaging feature (aka Comments).

## **Editing, cloning, and deleting options**

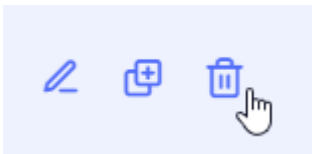
You may quote multiple options. To make it easier to add options you can use the clone feature. Click on the '**clone**' icon, change the details of the option, and make sure that each one of your options includes a unique PNR or reference code.



You can click the '**edit**' icon to modify an existing option at any point. Remember to save the changes.



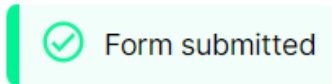
To remove an option click on the '**delete**' icon.





## Submitting options

When you are done adding all the options navigate to the bottom-right-side of the trip request page, click the '**Submit**' button, and wait for a success message.



### Notes:

- After you submit the first option for a trip your name will appear next to this trip in the 'agent' column of the portal's main page.
- Each trip undergoes an approval process and may pend the decision of different users. The status of each trip will change according to the step advancement of the approval process and the status column on the agent portal will advise progress.
- Travelers, or other users involved with this request, may ask you to introduce changes (e.g., edit, add, or remove an option) to the submitted options. To alter the options locate the trip in the agent portal, click it, make changes on the trip request form, click the '**Submit Changes**' button, and wait for a similar success message.

## Confirming and Ticketing



Travelers or other users, involved with the trip request, will select the options they want you to book. Once all users, involved in the approval process complete their approval tasks, the trip will advance to the **'Approved: Pending issue'** phase and you will be tasked with booking and confirming the various options.


**Note:** You can **'Select'** options on behalf of the traveler. It is imperative to communicate with travelers such actions using the Mesh in-app messaging feature (aka Comments) to ensure they are aware of your involvement.

To confirm & ticket, search for a trip with the mentioned status, click it, and review the selected options. Pay attention to preferences, notes, and communications, and if needed, click the pencil icon, modify the detail, and click the **'Save option'** button to introduce the changes. To finalize this step select the **payment methods** and enter the **confirmation number** for each option selected (e.g., flight, hotel, etc.).

✓ Selected flights


**Option #3** Expires in 2 d : 23 h : 11 min

 <b>Jul 7, 2024</b> United Airlines, Inc.	<b>11:00 AM - 04:30 PM</b> TLV - JFK	12h 30m Direct	Economy (B)
 <b>Jul 14, 2024</b> United Airlines, Inc.	<b>03:30 PM - 11:35 AM</b> JFK - TLV	10h 55m Direct	Economy (B)

 **Total: 1,440.00 USD**

### Quote #1

Price  
1,440.00 USD

Payment method  
Select... 

Confirmation number

The payment method drop-down list includes a few options. Please select the relevant option based on the agreement with the company you serve.

- Personal CC is a private card that travelers may provide. Such travelers plan to request a reimbursement expense on the Mesh platform.
- Corporate CC is a company card used to cover trip expenses.
- Mesh CC is a card used to cover the trip expenses and all related expenses will be presented on the traveler's dashboard.
- TMC means that your company is paying for the trip expenses. In such a case, an invoice for recent trips booked is provided periodically (e.g., once a month).
- UATP and Air Plus are payment methods related to the airfare space.

Please conclude the process by clicking the '**Confirm ticketing**' and wait for a success message.

### **Adding options to an issued trip**

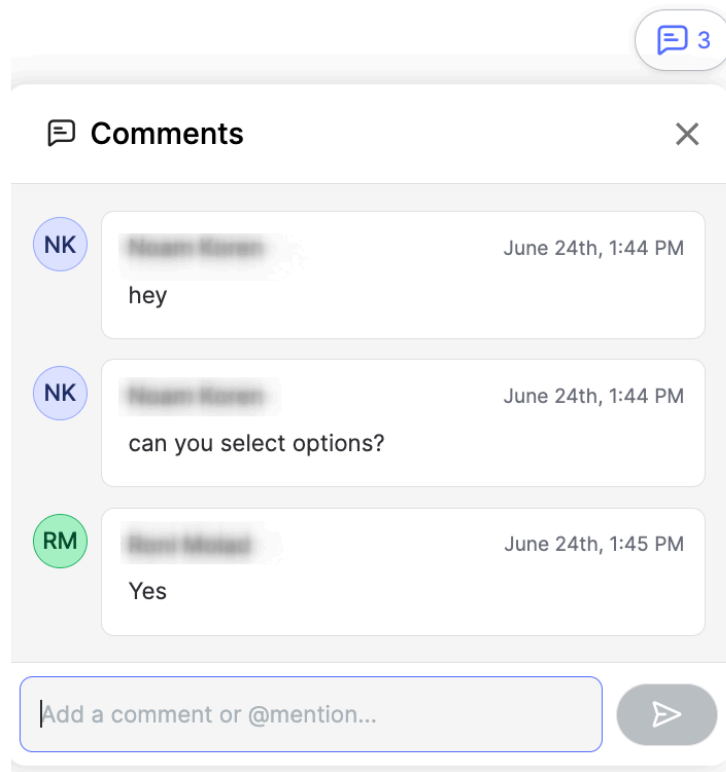
Follow the steps below to add options to a trip with the status '**Approved: Trip issued**'.

- Locate such a trip on the agent portal and click it.
- Click the '**View and edit options**' button to navigate to the part of the form that allows you to add options.
- Click the ellipsis and then click the 'Add flight', or 'Add hotel' option.
- Populate the details in the added option and click save.
- If needed, add more options.
- Click '**Submit changes**'.
- Click the '**View confirmation form**'.

- Use the in-app messaging feature to communicate with the traveler about the offered options and select the relevant options for the traveler.
- For each selected option add a **payment method** and **confirmation number**.
- Click '**Confirm ticketing**'.

## Communicating with users

The upper right corner of the trip options form includes an in-app communication tool called '**Comments**'. This feature allows agents, Mesh Travel Managers, Mesh Approvers, and Mesh Travelers to discuss trip-related matters. To view and post comments click on the comment icon and use mentions (i.e., @name) to draw a user's attention.



**Note:** When other Mesh users leave comments you will also be notified via email.

## Switching a booking method

The Mesh user interface enables travelers to modify their booking method (e.g., book directly) after receiving options from a travel agent. In case of such a change, the portal will notify agents with a relevant message in the designated section and via email.

Agents can then provide additional options, allowing travelers to choose from these new alternatives instead of proceeding with the direct booking method initially proposed. We recommend using the Mesh in-app messaging to communicate with travelers and travel managers.

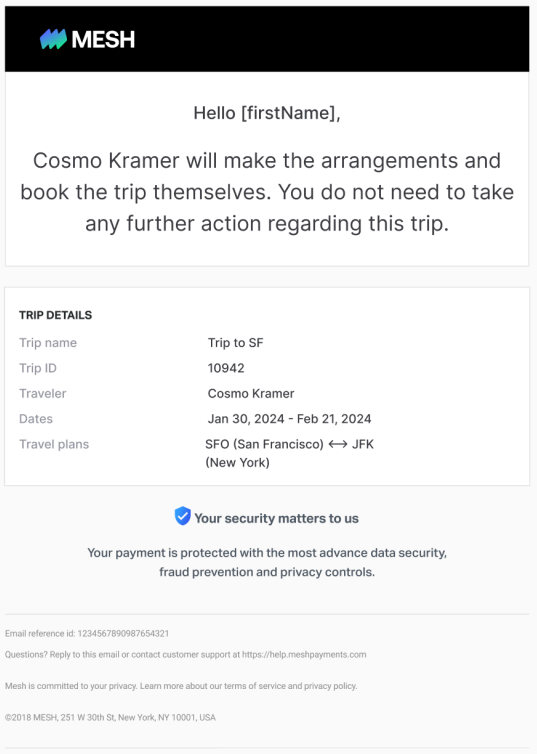


**Traveler will book flight independently**

London, United Kingdom → New York City, United States, Morning of Aug 7, 2024

New York City, United States → London, United Kingdom, Evening of Aug 13, 2024

Notes to agent  
Fly BA if possible



**MESH**

Hello [firstName],

Cosmo Kramer will make the arrangements and book the trip themselves. You do not need to take any further action regarding this trip.

**TRIP DETAILS**

Trip name	Trip to SF
Trip ID	10942
Traveler	Cosmo Kramer
Dates	Jan 30, 2024 - Feb 21, 2024
Travel plans	SFO (San Francisco) ↔ JFK (New York)

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## Assigning a trip request to an agent

To manage and divide responsibilities, it is possible to assign trip requests to specific agents. To direct a request, click the kebab menu icon next to the 'Trip ID' and select the appropriate agent.

### Agent Dashboard

Trips (2)

Search: Norman [x] | Traveler [v] | Status [v] | Request date [v] | Agent [v] | Departure Date [v] | Company [v]

Trip ID	Traveler	Status	Requested on	Agent	Departure date
T11341				-	Aug 27, 2024
T11325	Norman Kelly	Pending: Travele		Noam Koren	Aug 28, 2024

Assign to agent menu for T11341:

- Rebecca Lerner
- Erica Cohen
- Yuval
- Noam Koren
- Ella Travel

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