

Travel Agent Portal Guide

Updated: April 20th, 2025



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Introduction

Welcome to the Mesh Agent Portal — your central hub for delivering tailored travel options seamlessly to Mesh travelers.

We're thrilled to partner with you and look forward to this exciting journey together.

We have prepared this guide to help you kickstart your journey with Mesh, and we hope you find it useful. If you have any questions, please contact our team at support.tmc@meshpayments.com.

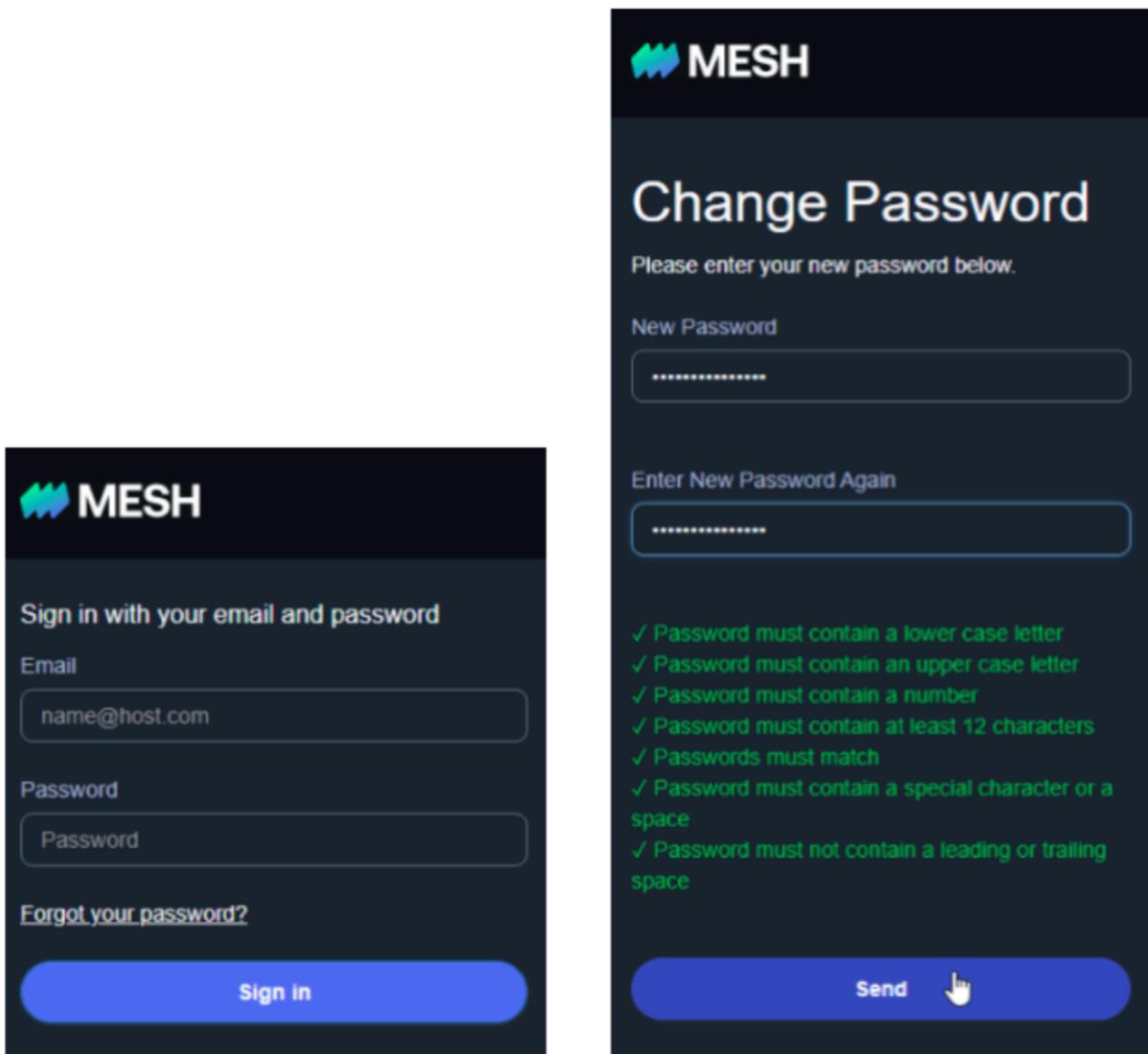
Sincerely,

The Travel team

Mesh Payments

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.



From now on, 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.

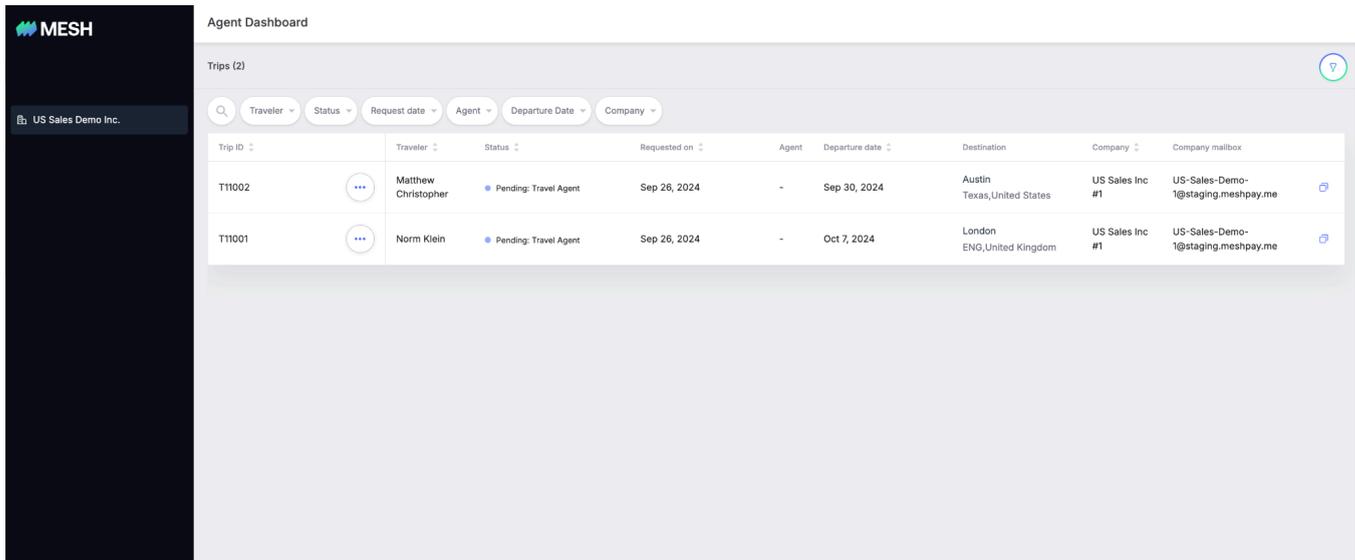
To **log out**, navigate to the bottom left corner, click your name, and click Log out.

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 the following sections: **Request summary**, **Options (Flights & Hotels)**, **Traveler Details**, and **Card Details** (if provided to agents). The data displayed originates from the trip request form submitted by travelers on the Mesh platform.

Request summary

Berlin, Germany → London, United Kingdom (Apr 21, 2025)

London, United Kingdom → Berlin, Germany (Apr 26, 2025)

Time off

Apr 25, 2025

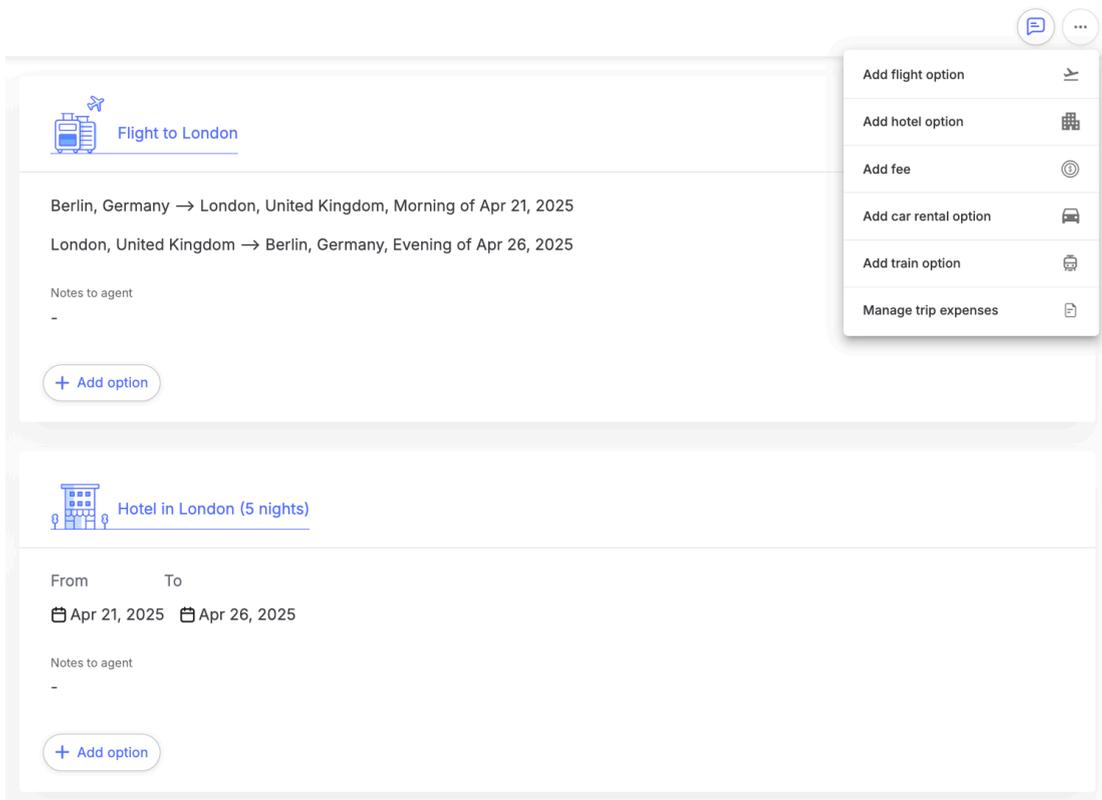
Total: 1 day off

Reason for the trip

-

Additional comments

-



The screenshot displays the Mesh interface for adding trip options. It features two main sections: "Flight to London" and "Hotel in London (5 nights)".

Flight to London

- Icon: 
- Text: Berlin, Germany → London, United Kingdom, Morning of Apr 21, 2025
- Text: London, United Kingdom → Berlin, Germany, Evening of Apr 26, 2025
- Text: Notes to agent -
- Button: [+ Add option](#)

Hotel in London (5 nights)

- Icon: 
- Text: From To
- Text:  Apr 21, 2025  Apr 26, 2025
- Text: Notes to agent -
- Button: [+ Add option](#)

A floating menu is visible on the right side of the screenshot, containing the following options:

- Add flight option 
- Add hotel option 
- Add fee 
- Add car rental option 
- Add train option 
- Manage trip expenses 

Traveler Details

First name (Given name)	Noah
Middle name	-
Last name (Surname)	Kelly
Gender identity	M (Male)
Phone No.	+12012149678
Email address	noam.koren@meshpayments.com
Travel Policy Group	Default (All employees)
Passport details	
Passport No.	123456789
Date of issue	Jan 1, 2020
Expiration date	Jan 1, 2030
Date of birth	Jan 1, 1997
Authority	United States
Nationality	American
Loyalty programs	
Airline	United Airlines (UA12345)
Trusted traveler program (TTP)	
TSA PreCheck or Global Entry membership	TSA123456
Airline Preferences	
Seating preference	Window
Meal preference	Regular
Additional preferences	-

Card details

[Show details](#)

Card No. 4242
Expiration date	../..
CVV	...
Owner name	Noah Kelly
Zip code	07670
Address	101 main street Tenafly, NJ ,US

Notes:

- 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 **Traveler details** section includes the **Travel Policy Group** (e.g., All employees, directors, CXO, etc.), which affects the travel budget and the 'out-of-policy' related messages.
- The **Options** section displays flights, hotels, and **additional options** if you need to quote them.

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), **Payment method** (Mesh CC, Personal CC, Corporate CC, TMC, UATP, and Air Plus), **Cancellation policies** with relevant fees, and optional **Remarks**.

Add flight option ✕

Quote #1: Flight

Quote valid until

Date 

Time --:-- -- 

Details

PNR Itinerary

Input the PNR from GDS

PNR Code

Source Select... 

Cost

Amount

Enter amount

Tax (Optional)

Enter amount

Currency  USD 

Cancel Save

To add a flight option, click the 'Add option +' button under the flight section, add the relevant data, and click the 'Save' button. If the option was added successfully, it will appear under the flight section.

Flight to London

Tel Aviv (TLV) → London (LHR), Afternoon of Feb 26, 2025

London (LHR) → Tel Aviv (TLV), Night of Mar 4, 2025

Notes to agent
-

Option #1

Expires in 7 d : 07 h : 57 min

Wed, Feb 26	06:40 AM - 10:05 AM	5h 25m	Economy (B)
<small>British Airways p.l.c. BA001 TLV - LHR</small>		Direct	<small>✕ ○ ○</small>
Tue, Mar 04	11:40 AM - 06:45 PM	5h 5m	Economy (B)
<small>British Airways p.l.c. BA220 LHR - TLV</small>		Direct	<small>✕ ○ ○</small>

✎ 📄 🗑
Total: 1,500.00 USD

Exceeds the 2500 USD limit

Option #2

Expires in 7 d : 07 h : 57 min

Wed, Feb 26	06:40 AM - 10:05 AM	5h 25m	Premium economy (B)
<small>EI Al Israel Airlines Ltd. LY055</small>	<small>TLV - LHR</small>	Direct	<small>✕ ○ ○</small>
Tue, Mar 04	11:40 AM - 06:45 PM	5h 5m	Premium economy (B)
<small>EI Al Israel Airlines Ltd. LY066</small>	<small>LHR - TLV</small>	Direct	<small>✕ ○ ○</small>

✎ 📄 🗑
Total: 3,500.00 USD

+ Add option

Notes

- 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**.
- The countdown timer (Expires in ...) indicates the time/date validity of the offer.
- When the time expires, a label named 'Not reserved' replaces the timer.
- You can not import trip options directly from the Global Distribution System (GDS)

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

Option 1	1 BA 001 B 26FEB 1 TLVLHR*SS1 0640 1005 /E 2 BA 220 B 04MAR 1 LHRTL*SS1 1140 1845 /E
Option 2	1 LY 055 B 26FEB 1 TLVLHR*SS1 0640 1005 /E 2 LY 066 B 04MAR 1 LHRTL*SS1 1140 1845 /E

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.

 Application Error, Please click on edit or delete  

The bottom part of the flight option 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, an upgrade fee, and any miscellaneous fee.

When adding such a quote, enter the amount, the currency, and relevant remarks. Click 'Save' when you have 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	06:40 AM - 09:30 AM	3h 50m	Economy (B)
<small>United Airlines, Inc. EWR - AUS</small>		Direct	
Jul 12, 2025	06:40 PM - 10:45 PM	3h 5m	Economy (B)
<small>United Airlines, Inc. AUS - EWR</small>		Direct	

Total: 2,974.00 USD

Option 09 h : 13 min ✕

Flights

Total	2,974.00 USD ^
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) v

06:40 AM
EWR

09:30 AM
AUS

3h 50m

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

06:40 PM
AUS

10:45 PM
EWR

3h 5m

12

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), **Name of the hotel, City, Check-In/Out Date/Time** (auto-populated from the trip request: time is optional), **Basis** (e.g., B&B, Full, Half, room only, all-inclusive), **Source, Cost** (i.e., amount, taxes, and currency), **Payment method** (Mesh CC, Personal CC, Corporate CC, TMC, UATP, and Air Plus), **Confirmation number, Refund and cancellation policies** with relevant fees, and optional **remarks**.

Add hotel option ×

Quote #1: Hotel

Quote valid until

Date  _____

Time ---:-- -- 

Details

Hotel name _____

City
Select City _____

Check in date  04/21/2025

[+ Add check in time \(optional\)](#)

Check out date  04/26/2025

[+ Add check out time \(optional\)](#)

Room basis
Select... 

Cancel Save

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

The screenshot shows a hotel booking interface. At the top, it says "Hotel in London (5 nights)". Below that, it shows the dates "From Apr 21, 2025 To Apr 26, 2025" and "Notes to agent -". There are two hotel options listed:

- Hilton NYC**: Sun, Apr 20 - Fri, Apr 25, 5 nights. Total: 1,500 USD. Includes taxes and fees | 300 USD per night.
- Marriott NYC**: Sun, Apr 20 - Fri, Apr 25, 5 nights. Total: 5,000 USD. Includes taxes and fees | 1,000 USD per night. A dark banner above this option says "Exceeds the nightly limit of 500 USD".

Note: The bottom 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**.

The bottom part of the hotel option includes a clickable link named '+ **Add Quote**'.

The screenshot shows a sidebar menu with the following options:

- + 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 finish adding all the quotes. Click on the option to view a detailed breakdown of the associated costs.

Option #3 ×

Hotels 

PNR
T11027-3

Total	1,200.00 USD ^
The Hide	1,200.00 USD

The Hide **1,200 USD**
Feb 26 - Mar 4 200 USD / night

Check-in time: 2:00 PM
Check-out time: 11:00 AM

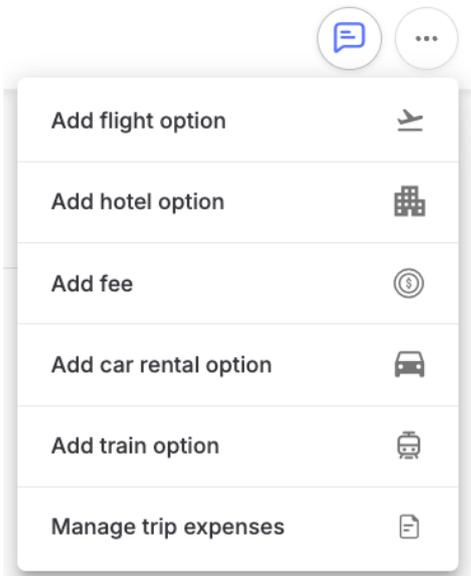
Reservation Status Room basis
Request Bed & breakfast

Cancellation policy
⌚ Nonrefundable

ⓘ Fees may apply per hotel policy

Add more options

The upper right corner of the user interface 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!](#)
- **Fees:** Quote additional fees such as cancellation, change, and handling.
- **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, date, and time, and enter the cost and refund policy. Optional fields include the railway company, station name, tax, and additional remarks.

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

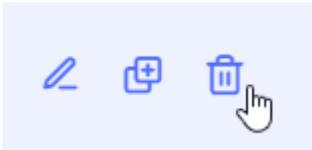
You can click the **'edit'** icon to modify an existing option at any point. Remember to save the changes.



Use the clone feature to duplicate and modify quotes. Click the **'clone'** icon, change the details of the option, and ensure each option has a unique PNR or reference code.

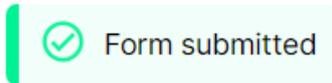


To remove an option, click the **'delete'** icon.



Submitting options

When you are done adding all the options, click the '**Submit**' button on the bottom-right of the trip request page, 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 be pending 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 and other users, involved with this request, may ask you to introduce changes (e.g., edit, add, or remove an option. To change 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

An **'Approved: Pending issue'** notification will appear next to a trip ready for confirmation and ticketing. Click the trip and review its details.

Agent Dashboard

Trip (1)				
Trip ID	Traveler	Status	Requested on	Agent
T11003	Noah Kelly	Approved: Pending issue	Apr 14, 2025	Nicholas Kennedy

If needed, edit selected options and click **'Save'** to store the changes.

You **'Confirm'** each approved option or click the **'Confirm selected options'** button to confirm all. At least one option needs to be confirmed.

✓ Approved on Apr 14, 05:45 PM

Option #4 Expires in 7 d : 09 h : 57 min

Mon, Jul 07	Joint Stock Company Red Wing 11:00 AM - 12:30 PM	2h 30m	Economy (B)
WZ001	BER - LHR	Direct	
Mon, Jul 14	Joint Stock Company Red Wing 04:35 PM - 07:30 PM	1h 55m	Economy (B)
WZ220	LHR - BER	Direct	

Total: 500 USD

✓ Approved on Apr 14, 05:45 PM

Option #1 Expires in 7 d : 09 h : 57 min

Hilton London

Sat, Apr 19 - Thu, Apr 24, 5 nights

Nonrefundable

Total: 1,500 USD
Includes taxes and fees | 300 USD per night

Click the **'Submit Changes'** button, wait for a success message, and ensure that the trip's status has changed to **'Approved: Trip issued'**.

Agent Dashboard

Trip (1)

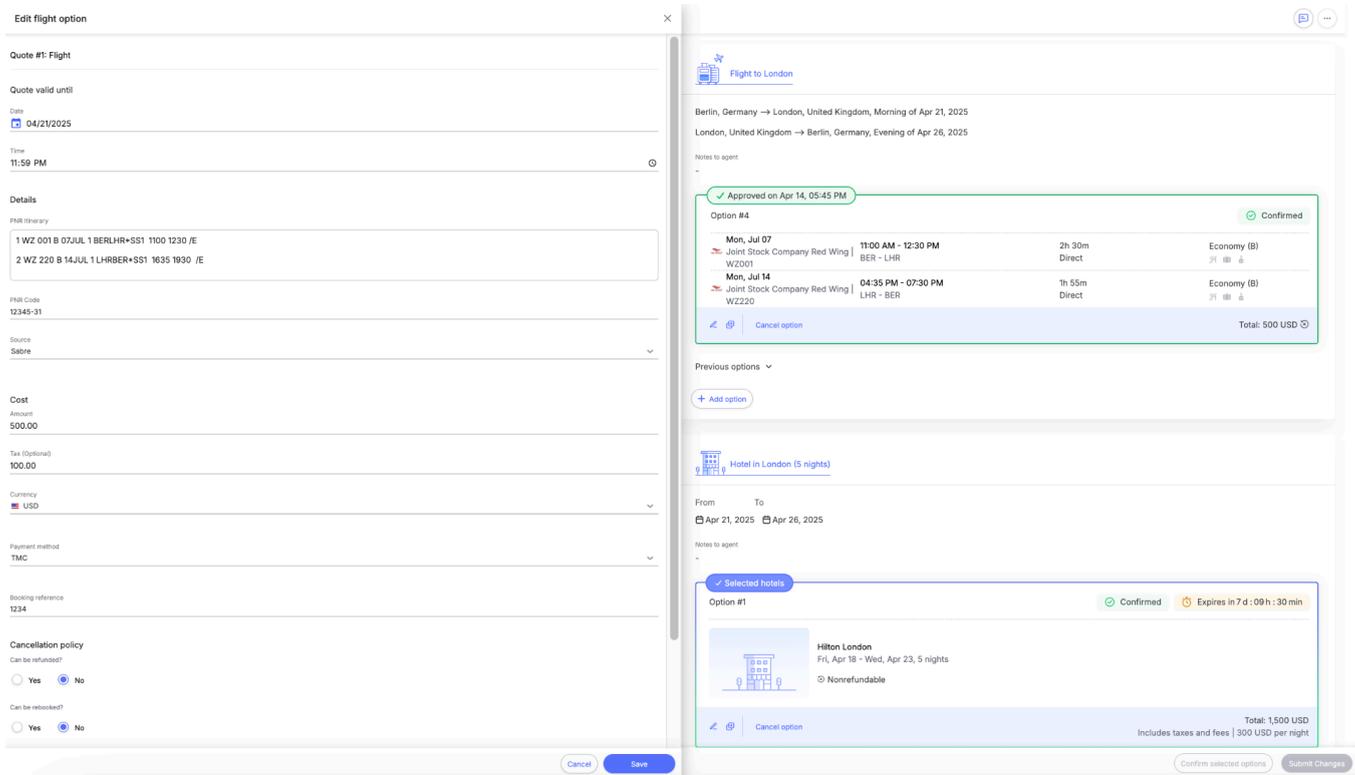
Search filters: Traveler, Status, Request date, Agent, Departure Date, Company

Trip ID	Traveler	Status	Requested on	Agent
T11003	Noah Kelly	Approved: Trip issued	Apr 14, 2025	Nicholas Kennedy

Note: It is imperative to communicate with travelers about such actions using the Mesh in-app messaging feature (aka Comments) to ensure they are all aware of the changes introduced.

Adding options to an issued trip

Locate a trip with the status Approved: Trip issued and click it.



The screenshot displays the 'Edit flight option' interface. On the left, a sidebar contains trip details: Quote #1: Flight, Quote valid until 04/2/2025, Time 11:59 PM, Details (PNR library: 1 WZ 001 B 07JUL 1 BERLHR*SS1 1100 1230 /E, 2 WZ 220 B 14JUL 1 LHRBER*SS1 1635 1930 /E), PNR Code 12345-31, Source Sabre, Cost Amount 500.00, Tax (Optional) 100.00, Currency USD, Payment method TMC, Booking reference 1234, and Cancellation policy (Can be refunded? No, Can be rebooked? No). The main panel shows 'Flight to London' with a confirmed status, approved on Apr 14, 05:45 PM. It lists two flight options: Option #4 (Joint Stock Company Red Wing WZ001, Mon, Jul 07, 11:00 AM - 12:30 PM, 2h 30m, Direct, Economy (B), Total: 500 USD) and Option #1 (Joint Stock Company Red Wing WZ220, Mon, Jul 14, 04:35 PM - 07:30 PM, 1h 55m, Direct, Economy (B), Total: 1,500 USD). Below the flights, a 'Hotel in London (5 nights)' is shown, selected and confirmed, with a total of 1,500 USD (including taxes and fees of 300 USD per night). The interface includes 'Cancel' and 'Save' buttons at the bottom left, and 'Confirm selected options' and 'Submit Changes' buttons at the bottom right.

You can edit the details of existing options or add more/other options. If you added more options, click '**Confirm**', then '**Submit Changes**', and wait for a success message.

Note: You can cancel an option. Please follow the suggestions for each relevant change.

Cancel option?

Canceling this confirmed option will remove it from the trip itinerary.

Do you want to also cancel the expense? Note: Any fees (e.g., cancellation fees) need to be manually added from **Add fees**.

- Yes, automatically cancel the expense and all related quotes
- No, do not cancel the expense

Cancel

Submit

As always, please use the in-app messaging feature to communicate with the traveler about the options offered.

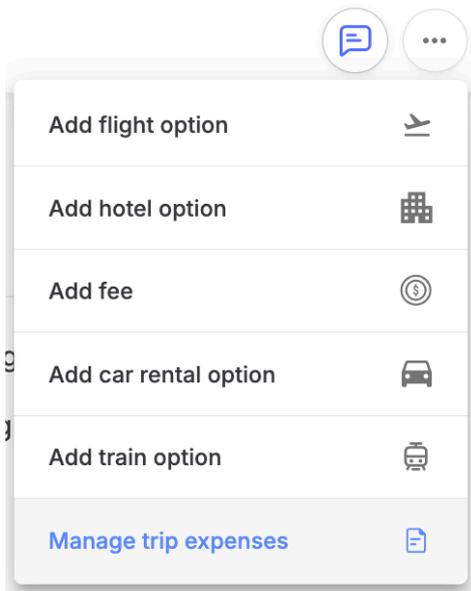
Managing and Canceling Expenses

Service providers (e.g., airlines), travelers, or their companies can request to cancel expenses related to ticketed trips marked as 'Approved: Trip Issued'.

Agents can use the '**Manage trip expenses**' feature to quickly review trip-related expenses and cancel any not processed with a Mesh card.

To manage and cancel flights, hotels, or any other trip-related expenses:

1. Navigate to the upper right corner of the trip, click the three dots, and select '**Manage trip expenses**'.



2. Click '**Cancel expense**'.

Manage trip expenses: Noah Kelly [Illusion Travel] [T11003]

Expenses (3)

Merchant/Service	Amount	Details	Payment method	Expense date	Expense status	
Hotel	1,500.00 USD	-	TMC	Apr 14, 2025	● Pending	Cancel expense
Flight	750.00 USD	12345-31e	TMC	Apr 14, 2025	● Pending	Cancel expense
Flight	750.00 USD	12345-31	TMC	Apr 14, 2025	● Pending	Cancel expense

3. Click 'Cancel expense' to confirm your selection.

Cancel expense?

The trip budget will reset accordingly.

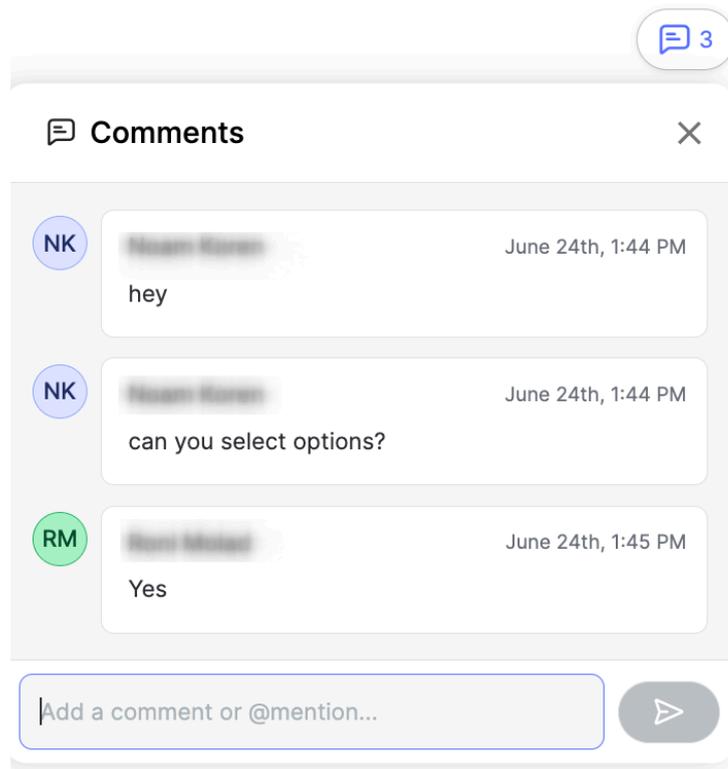


Notes:

- The canceled expense will be removed from the list.
- You can repeat the process for other expenses or close the page.

Communicating with users

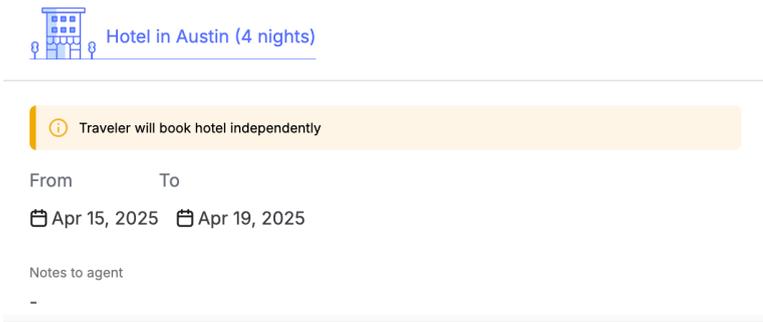
The upper right corner of the trip options form includes an in-app communication tool called '**Comments**'. This feature allows agents, Mesh Travel Managers, Mesh Approvers, and Mesh Travelers to discuss trip-related matters. To view and post comments, click on the comment icon and use mentions (i.e.,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



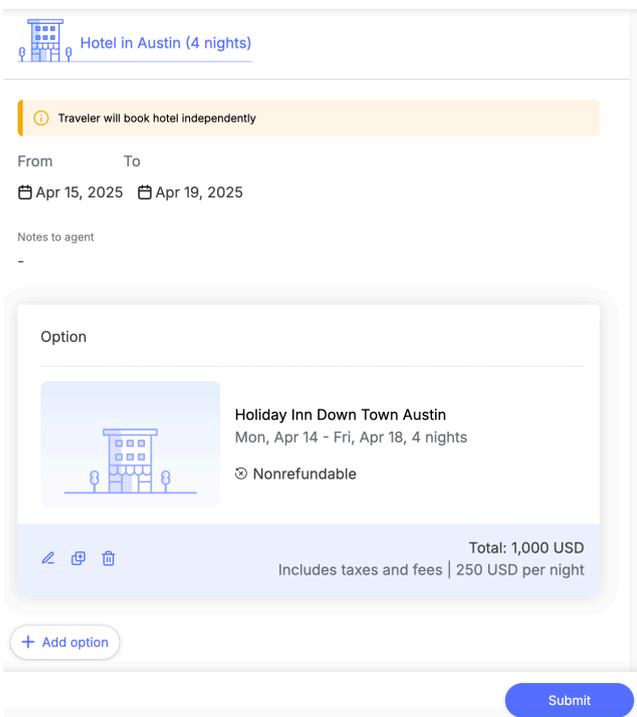
Note: When other Mesh users leave comments, you will also be notified via email.

Switching a booking method

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



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.



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 × | Traveler ▾ | Status ▾ | Request date ▾ | Agent ▾ | Departure Date ▾ | Company ▾

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

For Trip ID T11341, the 'Assign to agent' dropdown menu is open, showing the following options:

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

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