

# *Magic Mornings*

V A C A T I O N S

## Travel Joy Guide

**What info to input & Where to put it, so that  
you get PAID!**

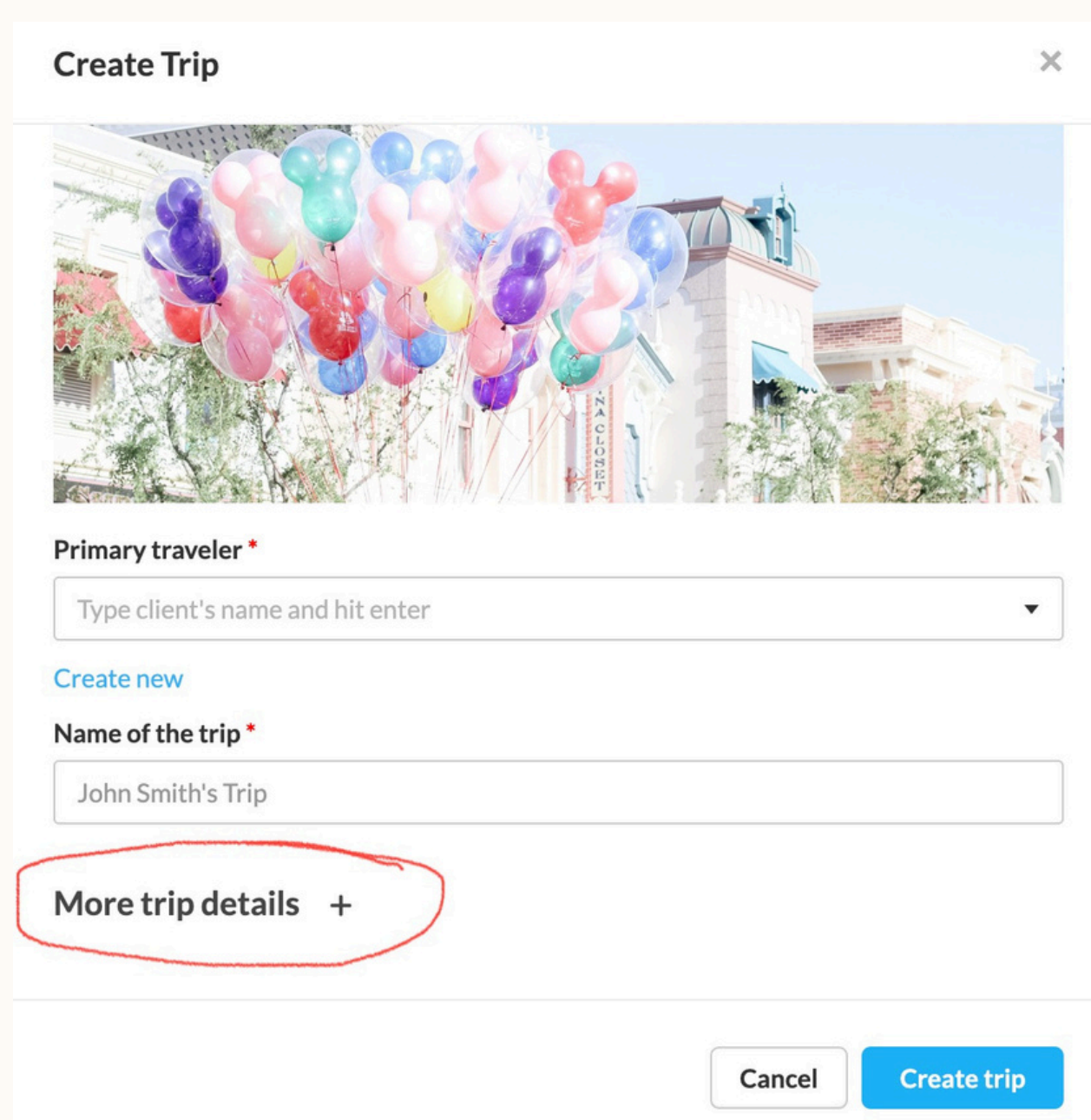
# Create a Trip:

In your Travel Joy dashboard, click the pink “CREATE” button in the top left. Select “Trip” from the drop down menu.

Please input the following info:

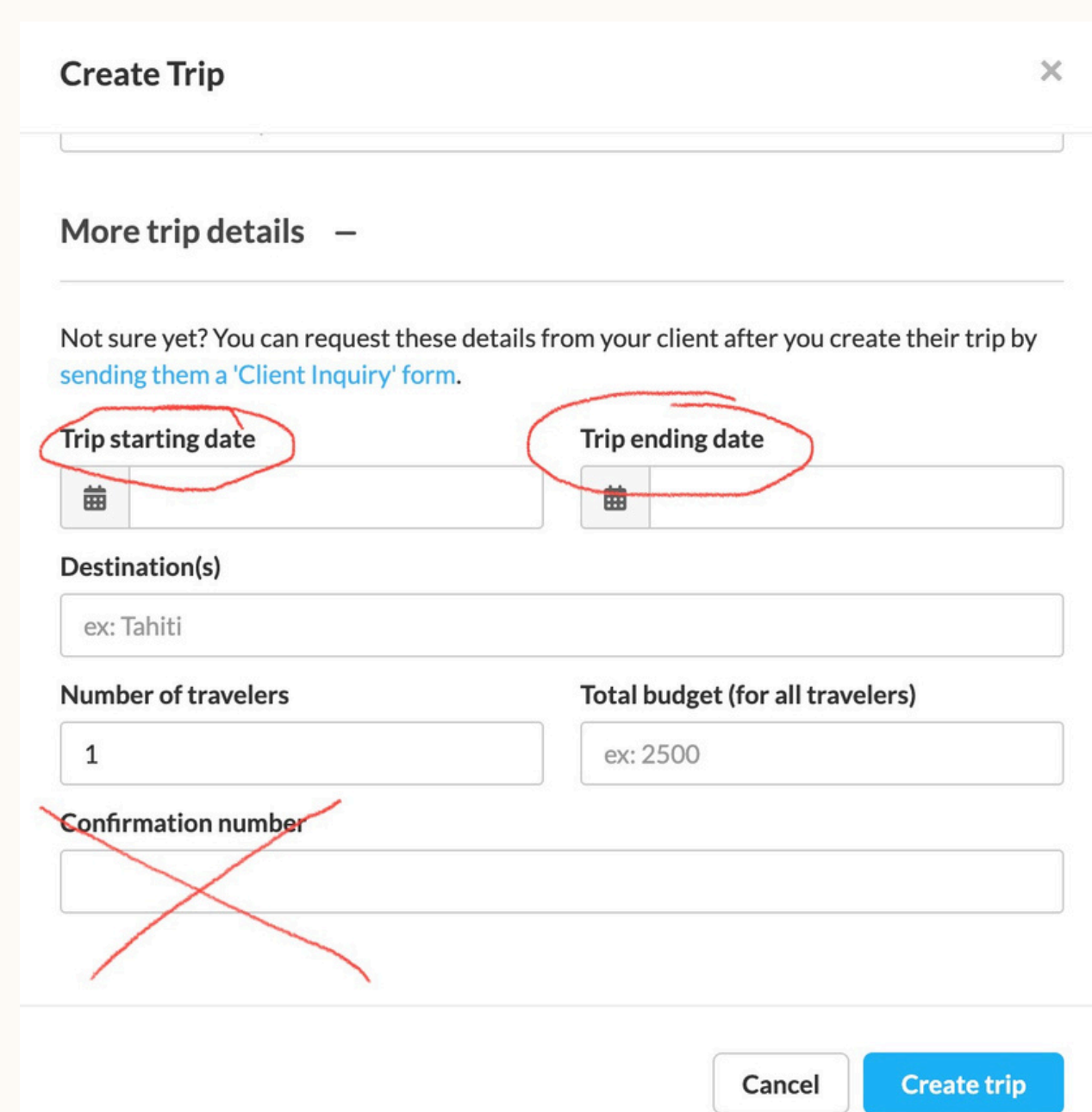
- Primary Traveler (follow the prompts to create a new client if needed)
- Name of the trip (Include full name of primary traveler, destination, and travel month & year.
- Trip start & end dates

**DO NOT** input the Confirmation Number here. This is **IMPORTANT!**



The screenshot shows the 'Create Trip' form with the following fields and elements:

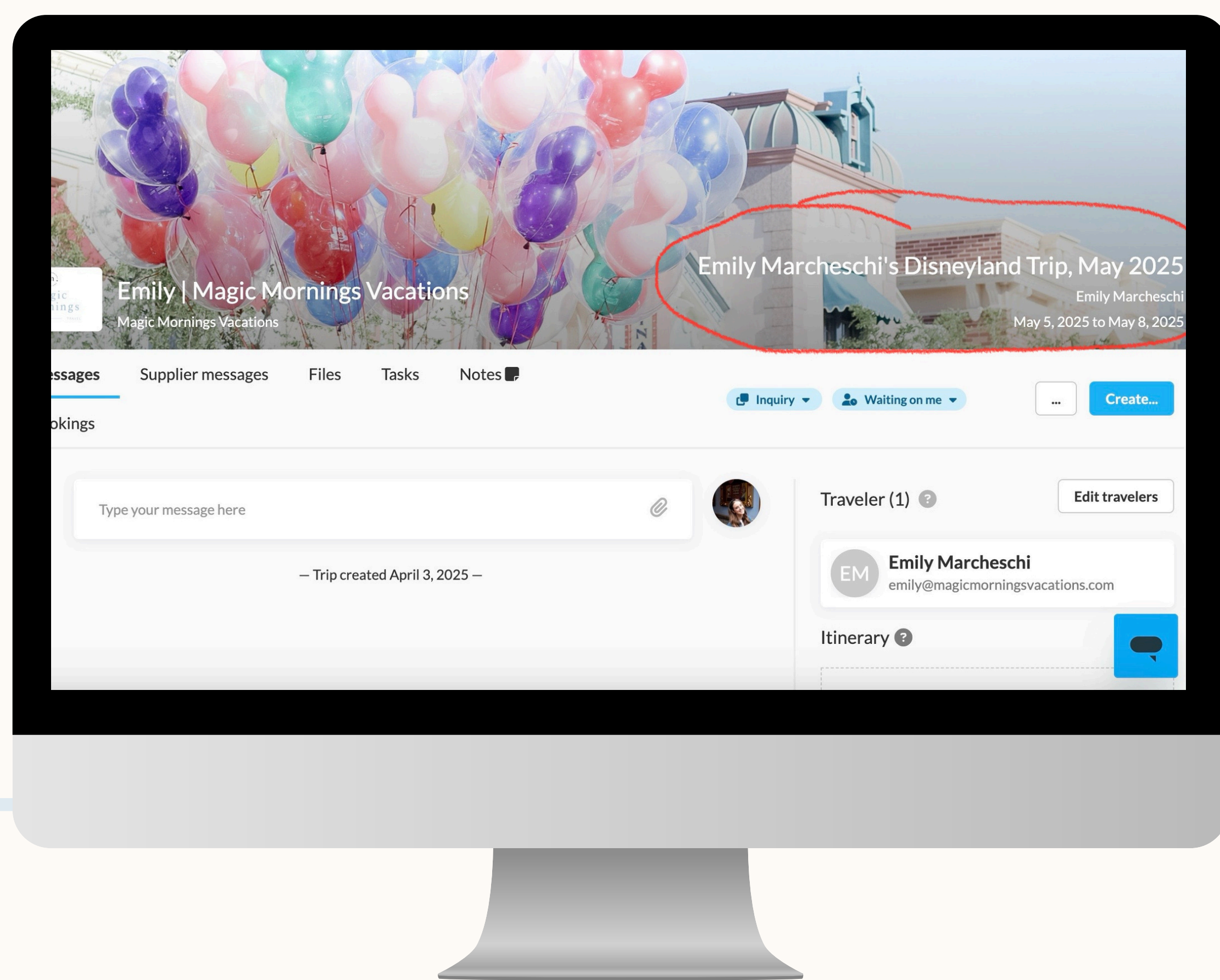
- Primary traveler \***: A dropdown menu with the placeholder text 'Type client's name and hit enter'.
- Create new**: A blue link.
- Name of the trip \***: A text input field containing 'John Smith's Trip'.
- More trip details +**: A button with a plus sign, circled in red.
- Buttons**: 'Cancel' and 'Create trip' buttons at the bottom right.



The screenshot shows the 'More trip details' section of the 'Create Trip' form with the following fields and elements:

- Trip starting date**: A date picker field, circled in red.
- Trip ending date**: A date picker field, circled in red.
- Destination(s)**: A text input field with the placeholder 'ex: Tahiti'.
- Number of travelers**: A text input field with the value '1'.
- Total budget (for all travelers)**: A text input field with the placeholder 'ex: 2500'.
- Confirmation number**: A text input field with a red 'X' over it, indicating it should not be used.
- Buttons**: 'Cancel' and 'Create trip' buttons at the bottom right.

Here is what the trip details should look like on the **trip dashboard**.



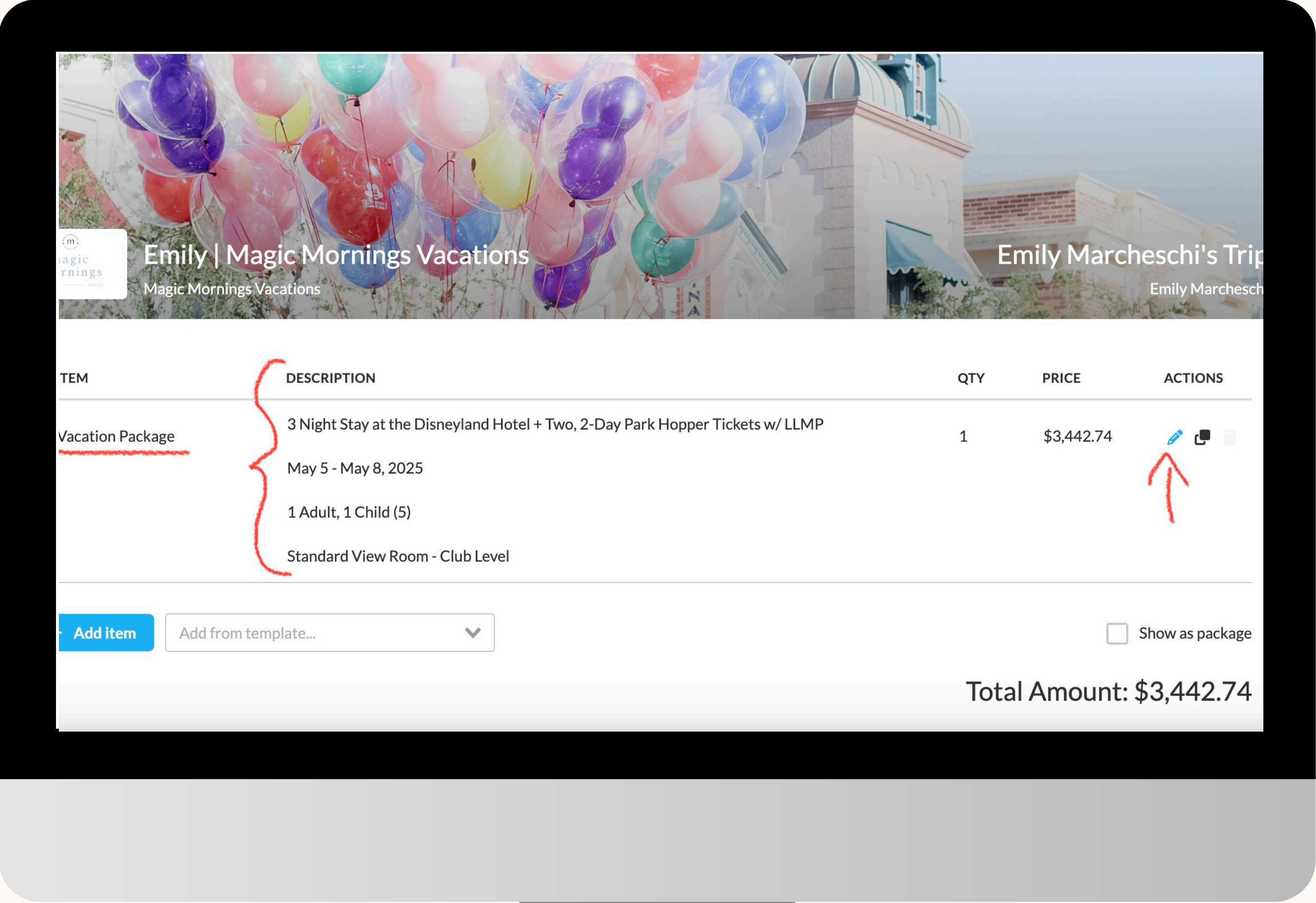
# Invoice Set Up

When you create an invoice for a client, **please set it up this way.**

**Item:** This should be “Hotel”, “Vacation Package”, “Tickets”, “Cruise”, “Transportation”, etc. The broad category of what you are booking!

**Description:** This is where you can input details. You should include the length of stay, hotel/cruise ship, room/stateroom type, ticket details, dates of travel, and number of adults & children in the party (or relevant information for other types of bookings).

**IMPORTANT STEP:** Once that information is done, and you’ve entered the total booking price, click the blue pencil icon to enter commission details.



Here is what the invoice details should look like on the **agent side**

# Invoice Set Up - Commission Details

When you click the **blue pencil icon**,  
here is the screen that pops up.

Edit Invoice Item

Item

Commission

Name

Vacation Package

Type

Description

3 Night Stay at the Disneyland Hotel + Two, 2-Day Park Hopper Tickets w/ LLMP  
May 5 - May 8, 2025  
1 Adult, 1 Child (5)  
Standard View Room - Club Level

Quantity

1

Unit cost

\$3,442.74

Cancel

Save

This is where you can see all of the details you’ve just input,  
including the total price for the booking.

Click the **“COMMISSION”** tab to enter your commission details.

Edit Invoice Item

Item

Commission

Supplier

Disneyland Resort

Booking date

04/05/2025

Commission split

60 %

Expected commission

05/05/2025

\$308.01

Total

\$184.81

Agent

\$123.20

Agency

Collected commission

\$0

Total

\$0

Agent

\$0

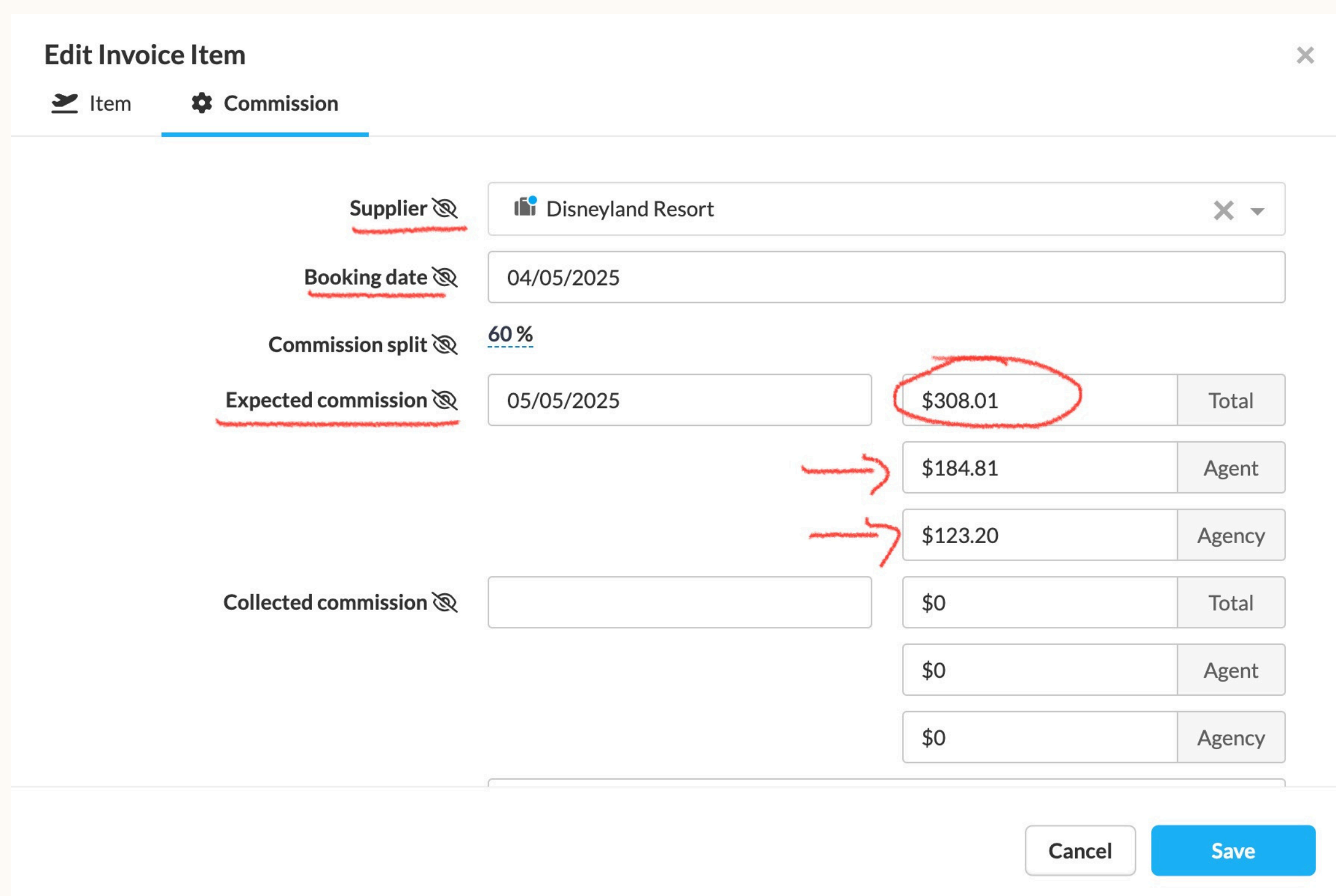
Agency

Cancel

Save

Here’s what you’ll see when you click the commission tab  
- **let’s go over the specifics!**

# Invoice Set Up - Commission Details



**Edit Invoice Item**

Item Commission

Supplier Disneyland Resort

Booking date 04/05/2025

Commission split 60 %

Expected commission 05/05/2025 \$308.01 Total

Collected commission

	\$184.81	Agent
	\$123.20	Agency
	\$0	Total
	\$0	Agent
	\$0	Agency

Cancel Save

**Supplier:** Please use the specific destination/vendor, i.e. Disneyland Resort, Walt Disney World Resort, Disney Cruise Line, Marriott, etc.

**Booking Date:** This is the date you booked the reservation. If you placed a package on hold, put the date the reservation was created, NOT the date that the booking deposit was paid.

**Commission Split:** Make sure this is correct! Split will depend on your agent status, whether it's a personal or MMV lead, & what you're booking. If you are unsure, reach out to your Team Leads.

**Expected Commission:** This is the date that your client checks in to their hotel, or sails on their ship. If it's a ticket only booking, it will be the date you purchased them. We are still receiving info on when other vendors pay us, so this section will be updated continuously. If you aren't sure what to put here, text your Team Leads!

**Commission Box:** This is the price box to the immediate right of the expected commission. Enter the total commission here. You can click "Show commission split info" to track your agent percentage for your records.

# Invoice Set Up - Commission Details

**Edit Invoice Item**

Item **Commission**

Supplier Disneyland Resort

Booking date 04/05/2025

Commission split 60.0% [Show commission split info](#)

Expected commission 05/05/2025 \$308.01 Total

Collected commission \$0 Total

Notes 38405038

Cancel Save

**Notes:** This is where we need confirmation numbers!! Please only put the confirmation number. Your client doesn't see this section on their invoice, and there's another place on the trip where you as the agent can input trip notes & details.

## THIS IS THE MOST IMPORTANT STEP

Please **do not** put anything in this box, **except for the booking confirmation number.**

You will do this for **each item** on the invoice.

When Chelsea process payroll throughout the month, **she searches by booking confirmation number** first, as that is what our vendors send on their reports to us. The second thing she will search by is **dates of travel**, so please don't forget those either!.

If you do not have a confirmation number here,  
**YOU WILL NOT BE PAID ON TIME.**

# Create a Group:

If you have a **group of more than one family traveling**, you **MUST** create a group. This is **crucial** for payroll to be a smooth process.

The screenshot shows the Travel Joy dashboard with a top navigation bar containing links like 'Send a form', 'Send an invoice', 'Create a proposal', 'Publish a group booking page', and 'Create an itinerary'. Below this is a summary section with 8 cards showing counts for various stages: All (21), Inquiry (3), Follow Up (0), Proposal Sent (2), Proposal Approved (0), Trip Booked (9), Client Departed (0), and Client Returned (7). The main section is titled 'WAITING ON' and includes filter tabs for 'All (21)', 'Me (13)', 'Client (6)', 'Supplier (0)', and 'None (2)'. A table lists groups with columns for 'GROUP/TRIP', 'CLIENT', 'DATE', 'UPDATED', 'STAGE', and 'WAITING ON'. The first four rows are expanded, showing group names like 'Elevate Cruise (4)', 'Magical Disneyland Vacation (3)', 'Magical Group Trip (1)', and 'Nelson Family Disneyland Trip May 2025 (2)'. Each row has a 'View group' button. The 'GROUP/TRIP' header is circled in red, and a red arrow points to the 'View group' button for 'Magical Group Trip (1)'.

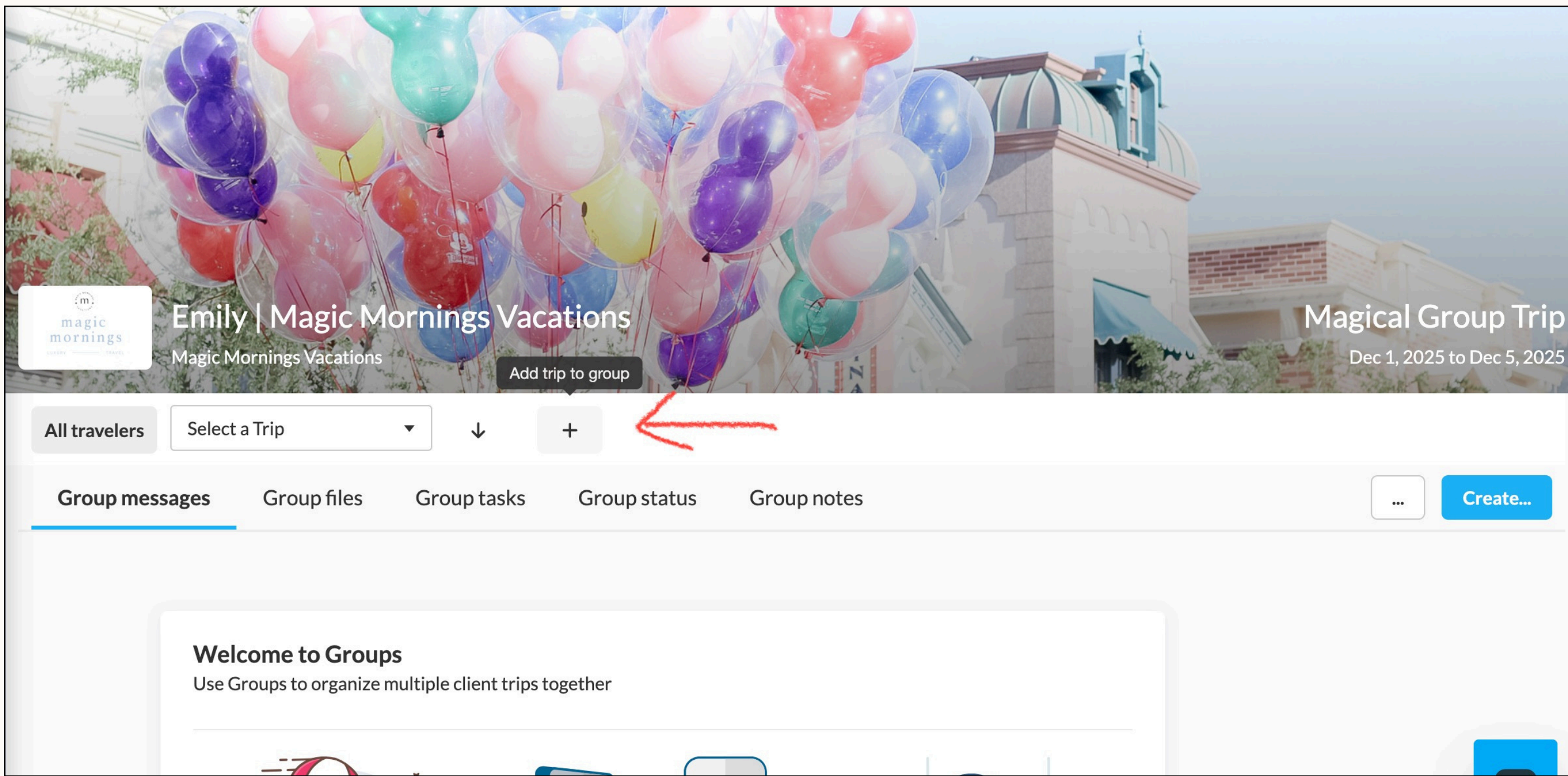
In your **Travel Joy dashboard**, click the **pink “CREATE”** button in the top left. Select “Group” from the drop down menu. **Note: This is different than a group booking page.**

A page will appear that looks similar to when you create a trip. **You will need to give the group a name, and input dates of travel.**

Once you click the **blue “create” button**, it will take you to the newly created **group dashboard**.

# Create a Trip within a Group:

To create a trip in your new Group, click the plus sign.



Here you will enter a **Primary/Lead Traveler** (or create a new one if needed), name the individual trip, and add travel dates.  
**DO NOT ENTER THE CONFIRMATION NUMBER HERE.**

Create Trip

Magical Group Trip

Group

Magical Group Trip

Primary traveler\*

Chelsea Merritt

Create new

Name of the trip\*

Magical Group Trip

More trip details

—

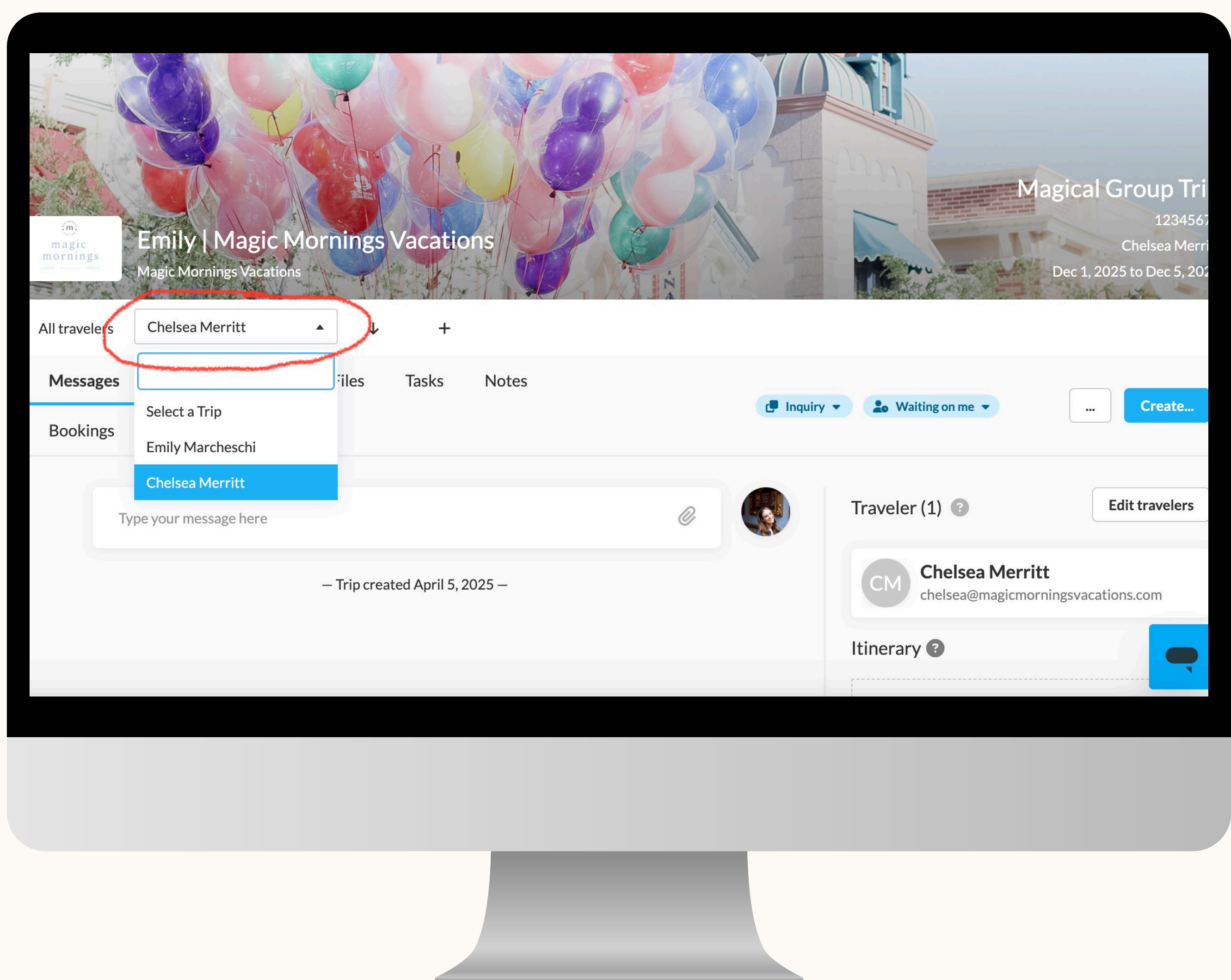
Cancel

Create trip

# Create a Trip within a Group:

Once you create your trip, you can follow the same steps as above to create an invoice for that specific trip's bookings.

Once you've created multiple trips within a group, you can use this drop down menu to toggle between them as you plan!



Keep **group notes in the group dashboard**, and **individual trip notes on each trip's dashboard**



# Review of Important Steps

- **Do not** enter a confirmation number when you create (or edit) a trip. This is NEW INFO!
- **When you create an invoice**, this is where you will add confirmation numbers for each individual booking item.
- Click the blue pencil on each item **to find the commission info** tab. Enter the confirmation number in the “Notes” box.
- **Do not enter more than one confirmation number** in the notes box
- **Put item details in the “Description” section** on an invoice
- Put **trip details in the “Notes”** section on a trip dashboard
- If you are booking more than one family for a trip, you **MUST create a group!** We can’t have multiple confirmation numbers in any box/section/entry.
- Once you create a group, **click the + sign to create trips within that group.**
- Inside a group, **use the drop down menu to toggle between trips as you plan.**

This is all so you, the agent, can be **paid properly and on time!** If anything is out of place, Chelsea isn’t able to find your booking & can’t match up the payment from our vendor.

**Thank you for your patience** as we adapt to this new platform & continue to troubleshoot any issues!

