Start Here: How to Log Every Sale in TravelJoy + Google Sheets

Hi First name / friend,

We are tightening our workflow and commission tracking. You book it → you log it.

Save this email and follow it every time you have a commissionable sale.

At-a-Glance: What's Covered in This Client Trip Logging Workflow

☑️ Tutorials for Travel Joy & Google Sheets Tracker

☑️ What Information You'll Need to Record a Sale

☑️ Part A: Log the Sale in TravelJoy (do this first)

☑️ Part B: Record the Sale in Google Sheets (commission tracker)

☑️ Part C: You Got Paid!

☑️ Monthly Close Checklist

☑️ Quick FAQs

☑️ Quality Habits that Help You Win

☑️ Reflection Prompts

Tutorials

- Travel Joy Logging Video: Part A: Log the Sale in TravelJoy (do this first)
- Google Sheets Tracker Video: Part B: Record the Sale in your Commission Tracker Google Sheet

☑️ **What information you'll need to record a sale:**

- Primary traveler and trip start/end dates
- Supplier(s) name and reservation/confirmation number(s)
- Total sale amount and estimated commission and/or commission %
- Invoice/receipt and supplier confirmation docs (PDF or screenshots)

☑️ Part A: Log the Sale in TravelJoy (do this first)

1. *Create/Open the Client Trip*
   Create or open the trip in TravelJoy. Confirm the lead/primary traveler name and record trip start and end dates.

2. *Update Trip Details*

   Add supplier and travel month to the trip name. Once booked, enter the supplier name followed by the confirmation number for each supplier. Double-check spelling and dates. Note: If the confirmation number ever changes, please update them across the required locations.

3. *Create a "Sale" Invoice*

   Create the invoice in TravelJoy. Even if you don't create an invoice for the client, you still need to create one to track the sale in TravelJoy. When marking as paid, uncheck *"send receipt"* if it's already been provided another way.

4. *Separate Line Items*

   If it has a confirmation #, it gets its own line item! Tickets, tours, booking fees, magical upgrades, and/or any single sale needing commission paid out for, please include that as a separate line item with all information. Packages with a single confirmation number can be included as a single item. Don't just use the default line item, select the appropriate option from the template dropdown.

5. *Add Item Essentials to Invoice*

   In the invoice, use the edit pencil to add essential details under the item tab for each item: descriptive name (including supplier when appropriate), item type, item description, etc. The more information, the better.

6. *Add Commission Essentials to Invoice*

   In the invoice, use the edit pencil to add commission essentials under the commission tab for each item: supplier (mandatory) booking date, expected commission date (based on item type), and total expected commission. Update the booking date based on the day the deposit was paid (not put on hold). Add the confirmation number in the "Supplier Confirmation Number" box. This is a change from previous policy and is a searchable field for Chelsea in reports.

7. *Add Special Case Details*

   For unique cases (e.g., personal trip booked under a spouse's name), use the notes field to communicate with Chelsea.

8. *Record Client Payment and Send Receipt*

   In the payment schedule section, click the green money bag to record payment details, mark as paid, and TravelJoy will automatically send the client the receipt (unless you uncheck the box).

9. *Send Booked Email with Confirmation & Add Docs to Client File*

   Upload screenshots of commission confirmation (if available) and supplier receipts/reservation docs into the client "Files" so they are easy to find later. Attach/forward supplier confirmation and/or receipt to the client with "Booked" email.

10. *Assign Client a Supplier Workflow*

    From the client trip under tasks, assign the correct Supplier Tasklist so emails are sent out on time. (example: mid-trip check-in, packing lists, park guides, 60-day dining).

11. *When Commission Arrives*

    In the invoice > commission tab, record the Commission Collected date (use the date Chelsea notes in the Google sheet). Enter the collected amount (must match expected commission for reconciliation).

☑️ Part B: Record the Sale in your Commission Tracker Google Sheet

First Time Using Google Sheets Only

1. Open the MMV Commission Tracker template and ***Make a Copy.***

2. Rename it with your name. Example: "Taylor S – Commissionable Trips & Tickets."

3. Share edit access to Chelsea@magicmorningsvacations.com and Nikki@magicmorningsvacations.com

☑️ Steps for Every Booking

1. On the Monthly tab for the correlating month of the sale, add one line item per commissionable sale. (correlating month = month sold or traveled).

<u>Include:</u> Lead type, confirmation number, supplier/destination, client check-in date (or ticket purchase date), lead/primary traveler first and last name, and expected agent commission.

2. Understand which month to use

   a. Tickets only, special event tickets, record on the month they are sold.
   b. Booking fee is for ticket only or special event, record on month you sold.
   c. Transportation: record in the month when it travels.
   d. Packages, hotel, car rental, park VIP Tours: record on the month the trip is traveled.
   e. Booking fee with package, hotel only, record on month the trip is traveled.

f. If a package starts on the 30/31 last day of the month, record on the month the trip started. (Ex: trip starts on March 30th; record on March Tab).
g. Until you receive commission payment from MMV, move the record to the month forward until payment is actually received, so payroll lines up.

3. Update the Annual Organizer tab with the same booking so your year-to-date totals are correct.

Include: Confirmation number, trip start/end dates (or ticket purchase date), lead traveler first and last name, total commissionable sale, total expected commission, expected agent commission, and payment status.

4. Keep your books current

   If any details are missing in TravelJoy or on your commission sheet, we may need to move that item to the next month's payout. Double-checking your entries helps ensure you get paid on time!

☑️ Part C: You Got Paid!

- In the commission tracker, update the column in the Annual Organizer tab with a Y for each paid item.
- In TravelJoy, navigate to Reports > Commissions & Sales > Details Tab > change date range dropdown to "expected commission date" > filter to date range last 90 days > sort by Past Due Agent Commission > for each confirmation #, record collected commission fields and date, matching the date Chelsea recorded your payout on your commission sheet.
- If you don't see it in the list, navigate directly to the appropriate client trip and invoice. In the invoice > commission tab, record the Commission Collected date (use the date Chelsea notes in the Google sheet). Enter the collected amount (must match expected commission for reconciliation).

☑️ Monthly Close Checklist

- All TravelJoy trips have confirmation numbers and documents attached
- Booked email sent to every client with confirmations attached
- Every commissionable sale is logged on the correct Monthly tab
- Annual Organizer totals match your monthly entries
- Unpaid vs Paid statuses are correct
- Commission receipts or remittances saved to the client file
- Questions or exceptions sent to Chelsea so payroll is clean

☑️ Quick FAQs

Q: What if I do not know my agent commission %?

A: Check your contract. If you still need help, ask Chelsea.

Q: When are payouts processed?

A: After MMV receives payment from the vendor. Timelines vary by supplier.

Q: What gets logged?

A: All commissionable sales. Tickets, packages, hotels, add-ons, booking fees and changes that affect commission.

Q: What if a vendor pays months later?

A: Until you receive commission payment from MMV, move the record to the month forward until commission payment is actually received, so payroll lines up.

Q: How do I know the supplier commission rate?

A: The best practice is to screenshot and/or write your commission totals down during the client reservation/booking process. However, you can find links to some of our major supplier commission tables in Boards or on the supplier website.

☑️ Glossary

Booking Date: Date the deposit is paid (not put on hold) for any sale.

Primary Traveler: The main person on a booking or reservation — the one whose name the trip is under and who is considered the lead contact.

Commission Collected Date: The date recorded on your Commission Tracker sheet with your total payout.

Confirmation #: the number given to you by the supplier. IF there is an itinerary number also, you may add that to the notes section.

Itinerary #: Expedia Taap has an itinerary number and sometimes a confirmation number also. The itinerary number is what needs to be in Travel joy as the Supplier Confirmation # to correlate with the report from Expedia Taap. The confirmation number is for the client facing side of your records.

PYO: Payout

Expected Agency Commission*:* The total commission amount .

☑️ Quality Habits that Help You Win

From our Workflow Gaps Worksheet:

- Daily: Check and clear messages by the end of day. Update client files. Follow up with warm leads.

- Weekly: Track bookings in TravelJoy + Sheets. Touch base with current clients. Create content. Join team training.

- Client Journey: Quick replies, clear proposals, set expectations, send personalized touches, mid-trip check-ins, and regular milestone reminders.

☑️ **Reflection Prompts**

Use your Goals & Gratitude page:

- What can I tighten up in my logging process?
- One automation idea to save time
- One way I can add more magic to each client
- Commitment statement for this month

You are doing amazing work. These steps keep our service sparkling and our books clean.

If you get stuck, reply here and we will help.

With pixie dust,

Nikki

Magic Mornings Vacations