ClientBase:
3.05 Key Enhancements

TMU 2009

Presented by:
Sharon Meyer, CTC

3.05 New Features and Enhancements

General Enhancements:

*****Added the ability to create email signatures for use with the Merge to Email feature**. A global set of Email Signatures can be created using formatted text, User Login and Agent merge fields and graphics. Each User Login can link to one of these global email signatures to set as that User's default signature. Upon launching Merge to Email, the system will automatically launch the current User's default signature or an email signature can be selected at that time.
Setting Up Your Email Signatures
-Go to Global Defaults|Email Signatures and click on Add
-Enter a brief description for the signature
-Create an email Signature using formatted text and merge fields. If desired, use the blue and yellow button (with a picture of a person) to insert a graphic file.
-Click OK to save and repeat these steps to create multiple email signatures.
-Upon creating your global email signatures have each User go to Utilities|My Login and click the Email settings tab to select a default email signature for each User.
Using Email Signatures from Merge to Email
-Upon launching Merge to Email click the Signature tab to view the default email signature based on the current login and setup established above.
-Override the default signature or enter a unique signature directly from this tab if desired. Click the drop down listing next to the field called Signature to select from your default signatures setup in Global Defaults. Override any of these defaults by typing within the Signature area.

*****Updated the Merge PNR Settings for Passenger Name Formats to include the ability to create custom format settings for Children (over 2) and Infants (under 2).** Use a combination of text, merge fields and special characters to format passengers as either children or infants based on the passenger level Birthdate entry. The following Merge Fields can be included in this rule:
Courtesy Title, First Name, Last Name, Middle Initial, Middle Name, No. of Passengers, First Name Initial, 2 Digit Age In Months, 2 Digit Age in Years, Birthdate (various date formats).

*****Updated the time fields throughout ClientBase so that rather than forcing AM/PM time settings the system now uses the Windows time settings and formats the ClientBase time fields accordingly.** Your computer's time format is set within your Control Panel under Regional and Language Options. Within the Regional Options tab select the desired Region and click customize to verify the desired time settings. The options include:
h:mm:ss:tt
hh:mm:ss:tt
H:mm:ss
HH:mm.ss
Time format notation:

h=hour
m=minute
s=seconds
tt=AM/PM
h=12 hour
H=24 hour

<u>Profile Related Enhancements</u>
*******Added a new check box field to the Address and Email records called "Invalid" for use by a marketing organization or marketing person within the agency that has received something back as undeliverable.** Rather than deleting the address or email entirely from the database without the proper research, the marketing person can check the "Invalid" box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or email "Invalid" status. Agencies should use these queries periodically to see if they have any "Invalid" addresses or emails that need updating. In the meantime, any addresses and emails with this "Invalid" setting will still be included in all Merge To features and reports.

*******Added a verification process upon saving a new email to the database to validate the email entry does not contain any typographical errors.** System now checks for spaces, validates characters and validates there is a domain and domain extension. If the current email entry being saved does not pass this validation the system now prompts the user with a message "Invalid E-mail format. Accept E-mail?" The User has the option to say "Yes" and save the invalid entry, or "No" and go back to make a correction.

*******Added the ability set the Marketing Permission setting at the Profile Address level. Each profile address has a new checkbox setting called "Allow Marketing Permission".** Upon installing version 3.05, all existing addresses within your database defaullts this new "Allow Marketing Permission" setting to being checked. To change the default for new profiles or new addresses, go to Global Defaults|Address Defaults and change it from "Allow Marketing Permission (checked)" to "Not allow Marketing Permission (unchecked)".
Level 2 and Level 3 Profile Manager Queries have been updated so that queries can be filtered based on this marketing permission setting. The Merge to Label, Merge to Letter, Merge to File, Merge to File Handoff and File Export features have also been updated to include the ability the ability to filter out profiles without marketing permission by including a checkbox setting called "Include Only Addresses with Marketing Permission Checked".
Clients who have requested to be removed from a mailing list can now be excluded by unchecking this "Allow Marketing Permission" setting at the address record level. Beta 2 of 3.05 will include the ability to change this setting from the results of a query using the Global Modify feature. In the meantime, this setting can be updated on a profile by profile basis.

*******Need your agents help with efficiently coding your client profiles with the proper marketing codes, but afraid to give them the ability to use the full Global Modify feature? You are not alone, so we added the ability to add 1 marketing code at a time but to multiple profile results directly from the Profile Manager query results.** The next time you have a deluxe cruise promotion, for example, ask your agents to query their client profiles and from the results hold down the Ctrl key while clicking on each client record that you would like to identify as a deluxe cruiser. After all desired profiles from the list have been selected (highlighted), use your mouse and right click and select "Add Marketing Code" from the the options. First add the marketing code for Deluxe (you will be prompted with a message "Add Deluxe to Selected Results in Profile Manager"). Then right click again and add the marketing code for Cruisers.

*******Added 1st Special Date and Type to the listing of fields that can be included within the Profile Manager Columns displayed in the Profile Manager Query results.** Click the Columns button from the Profile Manager to add SPECIALDATE.Special Date 1 or SPECIALDATE.Special Date Type 1 to your columns.

<u>Activity Related Enhancements</u>

*******Added a new field to Mailer records called "Link to Details" which allows for capturing a URL as a method for providing more details on the mailing that was sent to this client.** Upon creating Mailers this "Link to Details" can be populated so that as Users view a particular Mailer they can click the "Go" button next to this new field and the system automatically launches IE and navigates to that URL.

*******Added the ability to create a Reminder for more than one User Login at a time. Perfect for staff meetings or Reminders that you would like to create for multiple Users, click on the User Login drop down list within a Reminder and select as many Users as desired.** A separate Reminder will be created for each User.

*******Added the ability to print the At a Glance calender in the Day, Week or Month format. Timeless reminders will appear at 12am in order to print on this report.**

<u>Res Card Related Enhancements</u>

*******Added the ability to generate an Invoice directly from the Preview Invoice screen.** In previous versions you had to close out of the Preview screen to return to the Invoicing screen to access the Generate Invoice button. This release includes the Generate Invoice button right on the Preview Invoice screen.

*******When selecting the E-mail feature from an Invoice, Trip Proposal, Trip Statement or Itin, if multiple email addresses exist for the profile, the system now prompts with a listing of all email addresses and allows you to select more than one email, providing you with the ability to send these trip documents to multiple email**

addresses at one time. The profile's primary emailaddress is selected by default. Specific email addresses from the listing can be checked individually, or "Select All" can be checked to send to all email addresses within the profile.

*******Added the ability to enter multiple Forms of Payment for a single Reservation.** In previous versions, users had the ability to use a separate Form of Payment for each Reservation within a Res Card, but now each Reservation can have multiple Forms of Payments as well. In addition, partial payments can also be captured upon invoicing (payments totalling less than the invoiced amount). This does not apply to ARC type reservations, neither a partial payment or multiple Forms of Payment will be accepted for ARC reservations.

To capture more than one payment, or a partial payment, for a single Reservation click the Booking Payment button (which has been enhanced to include the total payment amount captured). Once clicked, the Booking Payment screen has been enhanced to include the ability to capture multiple payments by using the Insert, Update and New butttons. This screen also displays the Reservation's Current Invoice amount as well as the total Payments entered so far. Your Payments cannot total more than your Current Invoice amount. If your Payments total less than your Current Invoice amount, then you will be prompted with the following options upon trying to save the Booking Payment:

- Update Invoice Amount: Changes the Current Invoice amount to match the total Payments entered.
- Leave Balance Open: Leaves the Current Invoice amount and total payments as is and creates an open booking for the balance.
- Return to Payment: Takes the user back to the Booking Payments screen to update the payments accordingly.

When a single payment (or no payment) is applied to a single Reservation, upon generating an invoice the system creates one Invoice booking record for the one Reservation. When either multiple FOP's (Forms of Payment) or partial payments are entered for a single Reservation, the system then creates a separate Invoice Booking for each FOP. Each Invoice Booking created is identical except for the booking amount, which matches the payment amount.

Important Note regarding single payments for multiple bookings now saving as separate payment records:
As a result of this enhancement, CBW now saves a separate payment record for each booking, even if there is a single Form of Payment. In other words, if a cruise deposit of $200.00 and an insurance reservation of $300.00 is invoiced at the same time with one check, #255 for $500.00, upon generating the invoice two invoice bookings are created and two payment received records will be created, one for $200.00 and one for $300.00.

Import Note regarding handling Commission and Tax amounts when multiple or partial FOP's results in split bookings:
- If multiple payments add up to the amount being invoiced, handle commission with the following hierarchy:

- Put invoiced commission total on largest Cash, Check, EFT or CC Merchant booking
- If no Cash, Check, EFT or CC Merchant FOP's then put invoiced commission total on largest CC booking
- If multiple payments add up to the amount being invoiced, handle tax with the following hierarchy:
- Put full tax on the largest booking regardless of FOP
- If it's a partial payment (payment amounts do not add up to invoiced amount), put all tax and commission on the open booking
- Don't worry about Invoice bookings resulting in negative Base Fares
- Don't worry about Invoice bookings resulting in negative net amounts (commission being greater than base or total fare)

*******Updated the Res Card field called Region/Destination by separating into two fields: One for Region and one for Destination.** The Region field now includes a hard coded set of Regions and is populated by selecting from a drop down listing. (See below for the list of Regions). The Destination field is still a User Defined field and includes a new additional set of default values which can be customized by the agency under Global Defaults|User Defined Fields|Res Card: Destination. The user definable Destinations have also been enhanced to include the ability to be linked to one of the hard coded Regions. Upon upgrading to version 3.05, all existing Res Cards will convert the old Region/Destination entry into the new Destination field. The Region will be blank until Res Cards are updated accordingly. Upon creating a Res Card, if the Region field is completed first then upon selecting a Destination the drop down listing will only include a subset of those Destinations linked to that Region. If "Allow Freeflow" is not checked (forcing the Users to select from the drop down listing) then multiple Destinations can selected and inserted into one Res Card. These new Region and Destination fields have been added to the Level 2/3 Queries. They have also been added to Inventory records and the Inventory queries.
Hard Code Regions include: Africa, Asia, Australia & New Zealand, Bermuda & Caribbean, Canada, Egypt & Middle East, Europe, Mexico & Central America, South America & Antarctica, South Pacific, and United States.
**Special Note: Since our new set of default Destinations have been appended to your existing set of default Region/Destinations, we strongly encourage an administrator to go to Global Defaults|User Defined Fields|Destinations and consolidate and clean up the defaults after installing 3.05 and before Agents begin using it. Deleting or renaming a default Destination within the Global Defaults will not change the actual Res Card entries captured to date, it will only change the default drop down for use going forward.

*******Added the ability to capture "More Field" entries at the Reservation level of a Res Card in addition to the Res Card level. The "More Fields" tab and its entries provide your agency with customizable fields designed to capture data that is unique to your agency's or clients' needs.** By including More Fields at the Reservation level, you now have the ability to capture a More Field entry for just a specific Reservation within a Res Card without applying it to the entire Res Card. Also, since More Field entries can be linked to a TBO UDID, having Reservation level More Fields provides more flexibility around including specific UDID's only on certain Invoice

Bookings. Upon Invoicing, if a Reservation level More Field is linked to a UDID, then the UDID is captured only on that specific Reservation Booking in TBO. A Res Card level More Field, when linked to a UDID, will continue to populate all TBO Invoice Booking UDID fields. Upon Invoicing, if the same More Field has an entry at the Reservation level and Res Card level, then the Reservation level overrides the Res Card level and the TBO UDID captures the Reservation level More Field entry.

*******Added the ability to print More Field entries on the Invoice generated from the Res Card by adding a new "Print on Invoice" checkbox next to each More Field category at the Res Card and Reservation levels.** These Res Card level print settings can be checked by default by going to Global Defaults|Default Field Values for Res Cards and clicking on the Res Card More Fields tab. By default each More Field category is set to not print, but in addition to changing the Global Defaults, these print defaults can also be changed per Res Card and Reservation. If a More Field is set to print, any Res Card level entries print at bottom of the Invoice totals above Branch, Client and Agent Remarks and any Reservation level entries print at the bottom of Reservation details and above Itin/Invoice Remarks and Vendor Remarks.

<u>**Inventory Related Enhancements**</u>

*******Added the ability to link an Inventory record to more than 1 Group. Rather than just having one Group field within the Inventory record a new Group tab has been added to an Inventory record which includes the ability to associate multiple group names to one Inventory.** This feature combined with the ability to pull multiple inventory records at once (see release notes below) gives you the ability to batch separate inventory records together and therefore ease the process of selling and pulling inventory that are all associated but include multiple components or Vendors.
Also note that when pulling from Inventory from within a Res Card, if the Group field is completed at the Res Card level, upon clicking the Inventory feature the system will automatically filter the Inventory for that selected Group and display Inventory results accordingly.

*******Added the ability to pull Inventory at the Res Card level (in addition to the Reservation level) and included the ability to pull multiple Inventory details at one time creating multiple reservations at once.** Launching Inventory at the Res Card level is done by viewing the Reservations tab of the Res Card and clicking the Inventory button.
Upon clicking the Inventory button from the Res Card level, the system either provides you with the ability to query for your desired inventory, or, if a Group has been captured within the Res Card the query may be performed automatically if you have the Default Inventory Filter set to Res Card Group Name. Once your Inventory query criteria has been captured the system prompts with matching Inventory details and from this results screen the system now allows you to select any number of Inventory details by placing an X in the box within the column labeled "Pull". As you select each Inventory detail desired, the Pull From Inventory button's count is increased accordingly. Once all desired Inventory is selected click the Pull From Inventory button and the system imports each Inventory detail into a separate Reservation record and the available Inventory is

decreased accordingly. Please note that although the system allows for pulling more than one inventory detail at once, each inventory detail is linked to a separate Reservation and maintained separately therefore each are returned to inventory individually by either cancelling or deleting the Reservation.

Combining this new feature with the ability to "group" multiple inventory records together with a common group name (see release notes above) gives you the ability to batch separate inventory records together and therefore ease the process of selling and pulling inventory that are all associated but include multiple components or Vendors.

Agencies that need to track multiple components (for Vendor payment and sales purposes) but do not wish to break down the pricing of each componant on their client invoices, can use the Invoice Format option "Hide Reservation Totals (Include only Invoice Totals), upon invoicing these types of transactions.