

# ClientBase *ClientBase QuickStart* *Training Program*

We at Trams, Inc. feel strongly that the easiest and fastest way to get ClientBase up and running is to assign an In-House Trainer to implement the program. We suggest this trainer attend our live WebEx *ClientBase Overview* or *Frontline Agent Overview* and *Starting with the Basics* classes which were intentionally designed to go hand-in-hand with this program. The enclosed 5-step all-inclusive training program is designed to help the In-House Trainer with training agents. It consists of 5 basic ClientBase concepts:

- Packet One: Learning Basic Profile Skills**
- Packet Two: Learning Merge to PNR**
- Packet Three: Updating Marketing Codes**
- Packet Four: Getting Started with Reminders and Res Cards**
- Packet Five: Enhanced Res Card Skills**

## ***How Does the In-House Trainer Begin?***

The following steps outline how to use each of the 5 training packets:



**1. Overview** – Each training packet starts with a general overview of the skills that will be covered. Read this overview before starting each program.



**2. Setup** – This section guides you through the process of setting up the area of ClientBase you need to utilize to train your agents.



**3. Class Outline** – To help you train your agents on each skill, a class outline of the material to review is included.



**4. Agent Handouts** – Practice makes perfect. After training your agents on a skill using the class outline, agent handouts are provided including “Cheat Sheets” and practice drills.



**5. Monitor Results** – This is probably the most important part of the training program. The only way to ensure your agents “get it” is to track results. This section gives you queries and reports for you to see who’s caught on and who needs help.

Additional Resources and Skill Enhancement exercises are also included in back of each packet.

# ClientBase Packet One: Learning Basic Profile Skills

ClientBase QuickStart  
Customized Turnkey Program

Profile Skills Overview

## GOAL:

Teach agents basic concept of profiles and uses.

## What to do next?

See Profile Setup.



## Overview

In many agencies client information is stored in too many different locations. With ClientBase, you now have a tool that centralizes all client data into a single location, and makes that information accessible to everyone via a client profile.

In this first packet, **Learning Basic Profile Skills**, you are teaching the agents to master the following Profile skills:

- How to launch ClientBase and toggle between other programs.
- How to begin doing Level 1 Lookup (Query) using *Client Search Folder*.
- Start a new profile.
- Update existing profiles.
- Complete key profile fields:
  - First Name
  - Last Name
  - Courtesy Title
  - Primary Address
  - Primary Phones/E-mails
  - Interface ID (if agency requires)
  - Salutation
  - Family Members (Names, Credit Cards, Frequent Flyer Numbers)
- How to use Travel History to view past client travel.
- How to use OK/Cancel/Apply.

# Packet One: Learning Basic Profile Skills

ClientBase QuickStart Program  
Customized Turnkey Program

Profile Skills Setup

## GOAL:

Setup ClientBase before teaching agents basic profile skills.

## What to do next?

See Class Outline.



## Setup

- 1) Enter basic Branch information--Name, Address, Phone number, etc.--by going to **Utilities|Branch**. Invoice/Refund info and PNR entries can be entered later. Repeat for each branch.
- 2) Make sure there is an Agent type profile for each Agent and make sure the Branch field is completed in the General Info Tab.
- 3) Go to **Utilities|User Logins|Group Security Level** to customize masters for security levels. (See back for details.)
- 4) Go to **Utilities|User Logins** to setup each user (agent). Associate each agent with an Agent Profile, and under *Profile* defaults, select *Family/Employee* folder as default for Leisure and Corporate. (See back.)
- 5) Setup up a *Client Search* global folder by using Level One Query Filters. Set the first filter as *Profile Name* and in field box, type *Enter Name Here*. Set the second filter as *Family/Traveler Name* and leave blank. Save Query as a Global folder name *Client Search*.
- 6) In your own login, setup a *Profiles Updated Yesterday* folder doing a Level Two Query. In the *Profile Modify Date* "from" field, enter =-1,0,0 and in the "to" field enter =-1,0,0. Save Query as a personal folder for monitoring agent progress.
- 7) Under **Global Defaults|User Defined Fields**, customize *Frequent Zip Codes*, *Courtesy Titles*, and *Communication Descriptions* if desired. (See back.)
- 8) Under **Global Defaults|Default Values for New Profiles**, setup *Salutation* (optional), *Interface ID*, and *Courtesy Titles* (optional). (See back.)
- 9) Under **Global Defaults|Communications Defaults**, setup *Country code*, *Area Code*, and *Communication Default* fields if applicable.
- 10) Under **Global Defaults|Auto Case Converter Settings**, setup fields for automatic case handling. By placing a check into any of these fields, as you are working within your ClientBase profiles, the first letter of each word entered is automatically capitalized and the remaining letters are automatically set to lower case.
- 11) Under **Global Defaults|Required Fields**, designate **Required or Optional as desired** for Name, and Interface ID. Other required fields or optional fields can be added later.

\* **Special Note: Make sure you do not have duplicate profiles (including Agent profiles). Do a profile dupe check before Agents start using program. E-mail quickstart@trams.com or attend Q&A WebEx class for more information.**



## Setup **Group Security/User Logins**

1. **Log In to *ClientBase*** with User Name set to *SYSDBA* and Password set to *masterkey*. (Make sure to setup your branch information and each agent has a profile that is linked to a branch before you setup your User Logins.) It is suggested that you customize a *master* first by editing the *Group Security Level*. Both the User Name and Password entries are case sensitive. The only user login that provides access to the User List is the SYSDBA (System's Database Administrator) login. Only the SYSDBA user can update the security database to add, modify or delete users or groups of user's configurations.
2. **Group Security Levels:** Go to **Utilities|User Logins|Group Security Level**, highlight **Agent Access** (preset agent defaults), and click *Modify*. Complete each of the 7 tabs to establish the default permissions for this particular security level. Click *OK* to save.
3. **Go to Utilities|User List.** Click *Add*. Complete the fields for *User Name*, *Password* and *Profile*. On the pull-down menu for Security Level, select *Agent Access* for which you have pre-set the default permissions. (Selecting a security level group simply defaults the permissions accordingly; you can still go in and change any of the permissions for just this User without affecting anyone else with this security level.) Under *Profile* defaults, select *Family/Employee* folder as default for Leisure and Corporate and click *OK* to save.



## Customize **User Defined Fields**

1. Go to **Global Defaults|User Defined Fields|Title** to *Add*, *Modify*, or delete courtesy title values for your agency.
2. Go to **Global Defaults|User Defined Fields|Communication Descriptions** to *Add*, *Modify*, or delete communication description values for your agency.
3. Under **Global Defaults|User Defined Fields|Zip Codes**, add the most frequently used zip codes in the area and associate with City, State, and Country (if applicable).



## Setup **Default Values for New Profile**

1. Go to **Global Defaults|Default Field Values for New Profiles|General Tab**. Select a default field value for *Courtesy Title*, choose the default off the drop down menu.
2. **Address Tab:** Select a default field value for Zip Code, City, State, and Country from the drop down menu.
3. **Salutation Tab:** From the drop down menu, choose a field value if desired for *Salutation* which includes <First Name>, <First Name><Last Name>, <Courtesy Title><Last Name>, or <Courtesy Title><First Name><Last Name>.
4. **Interface Tab:** Choose from the drop-down menu a format for generating the default Interface ID. Use: <Area Code><Prefix><Suffix>; <Last Name><First Name><Agent Name>; <PROFILENO>; or <GENERATOR> with starting number set by agency.

# Packet One: Learning Basic Profile Skills

**GOAL:**

Teach agents ClientBase basic profile skills.

**What to do next?**

See Monitor Results.



## Class Outline

After setup, you are ready to hold a staff meeting. (**Important! Please have your agents attend the *Frontline Travel Agent Overview* 1-hour live WebEx class at [www.trams.com](http://www.trams.com) as a prerequisite to this training session.**) Photocopy, pass out *Agent Handouts*, and teach Basic Profile kills:

- Brief introduction from Owner or Manager:** What is ClientBase and why is it important to us as an agency? This is a pep talk, buy-in, demonstrating enthusiasm for the program. **(3-5 Minutes)**
- In-House Trainer Intro:** How does ClientBase benefit agents? **(3 Minutes)**
  - Helps me organize my daily routine
  - Instead of having client info in lots of places, I can now access it from just one place
  - Helps me remember more about my clients
  - Helps me qualify my clients
  - Everyone knows which clients are mine
  - Easier for others to help my clients
  - Service my clients better
  - Saves me time
  - Makes it possible for agency to market effectively and drive profitable business in through the doors
  - My agency thrives
- In-House Trainer Discussion:** How do I log into ClientBase and toggle between multiple applications? **(2 Minutes)**

**In-House Trainer Discussion:** What is a profile? **(3 Minutes)** In today's marketplace travel agents are finding a need to shift their focus away from just being order takers and processing transactions. A profile is a folder that contains all traveler information.

**In-House Trainer Demonstration:** How to look up a profile using Client Search folder, and update profile fields. Bonus: Click on Travel History tab to view what travel client has done in past! **(2 Minutes)**

**In-House Trainer Demonstration:** How to create a new profile, complete fields and review concept of auto-fill fields set by the agency. **(12 Minutes)**

- First Name
- Last Name
- Courtesy Title **(auto-fill field)**
- Primary Address **(auto-fill fields including concept for defined zip codes, city and state)**
- Primary Phones/E-mails
- Interface ID **(if agency requires; auto-fill field or how to use if not an auto-fill field)**
- Salutation **(auto-fill field)**
- Family Members (Legal Names, Credit Card Numbers, and Frequent Flyer Numbers)

**In-House Trainer Demonstration:** How to use OK/Cancel/Apply. **(1 Minute)**

**Q & A Session. (Cap at 5 Minutes)**

**In-House Trainer Hands On (10 Minutes):** Have agents practice new skills by calling up existing profiles and creating new ones by using role-playing (see Agent Handouts). You may want to just do a few of these, and let agents practice by on their own.

**In-House Trainer Sets Expectations (3 Minutes):** Show agents the User Stats Report, and suggest initial goals and how it will be tracked. For example, if on average an agent talks with 15 customers a day, 10 updates a day might be expected as an average.

**I Needed Help.**  
**I was disorganized.**  
**I was overworked.**  
**I wasted too much time looking for**  
**files, phone numbers and information.**



**ClientBase Helped!**

**ClientBase**

Learning Basic Profile Skills  
Agent Handouts



# Unleashing the Power with the Profile Manager



At the heart of *ClientBase* is the Profile Manager. From this window, view, sort and manage all the client, agent, or vendor information, or manage relationships with prospective clients and vendors. This is where many agents spend most of their time - accessing and updating data. In the past, a potential customer has called your agency, but never made it into the “system” because they did not book a trip. With *ClientBase*, turn prospects into lifetime customers by tracking these potential clients, taking ownership of them and including them in future marketing programs.

**Example:** Steve Rosen calls to plan a surprise getaway with his wife, Barbara, for their upcoming anniversary. After locating his profile, you notice the Travel History indicator notifying you that Steve has booked travel with the agency in the past. You quickly check their past travel history, then glance at their marketing preferences and with this information you are able to suggest just the right travel package. He appreciates your natural knowledge of their needs, which is why he books through you again and again. Oh, and while you are in their profile, you quickly capture the date of their anniversary in the *Special Dates* table, so next year you can initiate the idea of a romantic getaway.

**ClientBase Plus - [Rosen/Steve - LEISURE]**

Mr. and Mrs. Steve Rosen  
1183 E. Kent South  
Sandy, UT 81092

Phone +1 (604) 872-1192  
FAX  
Phone  
E-mail srosen@msn.com  
Interface ID 6048721192

Primary Agent Sharon Mey  
Created 10/21/1997

Groups  
Profile No. 150

ISSUEDATE	TRAVELCATEGORY	PASSENGERNAME	DEPARTDATE	ITINERARY	CLIENTPAYS	VENDORPAYSTATUS	CLIENTREMARKS
11/6/2000	Cruise	Rosen/Barbara,Rosi	5/1/2001	SJUCZMAUAPFNA	Closed	Open	
9/4/2000	Cruise	Rosen/Barbara	5/1/2001	SJUCZMAUAPFNA	Closed	Closed	
9/4/2000	Air	Rosen/Barbara	8/31/2001	LAXSJUACALAX	Closed	Open	
9/4/2000	Insurance	Rosen/Barbara	9/1/2000				
8/27/2000	Cruise	Rosen/Barbara	5/1/2001				
1/26/2000	Tour	Rosen/Steve	3/1/2000	MIA			
1/26/1999	Tour	Rosen/Steve	3/1/1999	MIA			
1/25/1997	Cruise	Rosen/Steve	3/1/1997	MIA			
1/3/1996	Cruise	Rosen/Steve	1/15/1996	MIA			
1/2/1996	Tour	Rosen/Steve	2/15/1996	MBD			
1/17/1994	Air	Rosen/Steve	2/15/1994	LAXSFLAX			
1/4/1994	Air	Rosen/Steve	2/15/1994	LAXM			
1/4/1994	Air	Rosen/Barbara	2/15/1994	LAXM			

Sort Issue Date Issue Date Count: 13 Sales Commission Custom Query  
Total: 19,717.55 2,305.15  
Average: 1,516.73 177.32 Run Query

Summary: Login Name=MARY Database=C:\gdb\Newtrain.gdb 568,956 KB 10/1/2000

# Packet One: Learning Basic Profile Skills

**GOAL:**  
*To learn  
basic profile  
skills.*

**What to  
do next?**  
*Practice,  
Practice,  
Practice!*



## Cheat Sheet

Steps for successfully using Profiles:

- 1. With every customer contact, query (search) for profile** by name in Global Folder entitled *Client Search*. Enter the first few letters of Profile Name or Family/Traveler Last name in field that says *Enter Name Here*.
  
- 2. If FOUND**, open and verify profile data in header. Click *General Info* tab to update any information. Next add any travelers/family members for this profile in *Family Member Tab* by clicking *Add* and add first name, last name, credit card, and frequent flyer numbers.
  
- 3. If NOT FOUND**, click on the Profile Icon in toolbar and add either Leisure Profile or Corporate Profile. Minimum required is Name, address, phone number...& email if you can get it!

**See diagrams on back.**

Black Areas Suggested

### Sample Profile General Info Tab Fields to Complete:

**ClientBase Plus - [Reid/Charles - LEISURE]**

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

**Leisure** Remind Note Mailer Rescard Print Label Letter PNR E-mail

Mr. Charles Reid  
25 Main Street  
Los Angeles, CA 90045

Phone +1 (310) 514-0555  
Cell +1 (310) 514-0666  
FAX  
E-mail charles@aol.com  
Interface ID 3105140555

Primary Agent Mary Jones  
Created 9/30/2003

Groups  
Profile No. 623

General Info Remarks Marketing Family Members Activities Travel History Cards ResCards Payment History Attachments PNR Entries More

Type Leisure

Last Reid First Charles M.I. Courtesy Title Mr.

Address 1 Primary, Bill To, Ship To << Modify

Address Line 1 25 Main Street

Address Line 2 Apt/Suite.

Zip Code 90045 City Los Angeles State CA

Country Additional Addresses

Interface ID 3105140555 Primary Agent Mary Jones

Branch No. [0] Travel With TI Salutation Mr. Reid

Referred By Web ID Web Pswd

Profile Last Modified MARY 9/30/2003 10:28:46 AM

Special Dates

Month Day Year Type

Create Date 9/30/2003 Profile Status Active

Create User MARY

Login Name=MARY Database=C:\gdb\Newtrain.gdb 581,904 KB 9/30/2003 10:29:22 AM 0 Alarms

### Sample Profile Family/Employee Tab Fields to Complete:

**Family Member/Employee**

Relationship with Profile Courtesy Title First Name Middle Name Last Name

Primary Mr. Charles Reid

Birthdate Gender Citizenship

Communication

Type Entry Description

Phone Phone Additional Communications

Passports

Passport Number Expiration Issue Date Issuing City Issuing Country

Primary Primary

Remarks Cards - FF/CC Air Prefs Car Prefs Cruise Prefs Hotel Prefs Tour Prefs General Prefs PNR

Ok Cancel

**Frequent Flyer, Credit Cards, Passport #, Etc...**

Name Reid/Charles

More Details

Approx. Miles

Card Limit

CardType Card Code Card Description

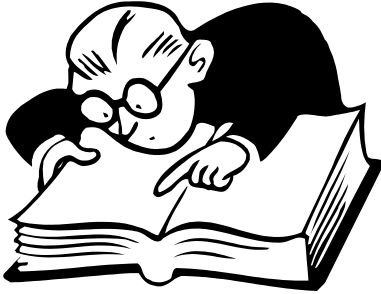
Credit Card

Card Number Expiration Name on Card

Issued By

Remarks

Ok Cancel



## **Let's Practice!**

### **Exercise #1: Role Play**

Partner up with another agent in your office and practice different methods for finding who you are talking with on the phone.

- Example 1: Hi my name is Susan Anderson, and your name is?
- Example 2: Query for the client's profile. If they are in the system, say "I see you've booked with us in the past (using the Travel History folder). Are you still at this address? Are you still at this phone number? I see I don't have an e-mail for you, may I have that please?" (This way the client thinks you "remember" them. If not in system, create a new profile by saying, "Can I get your name and your phone number please? "

### **Exercise #2: Clean up your top 50 customer profiles for your agency! (If none exist, see Exercise #3).**

Clean up your top 50 client profiles making sure they have proper addresses, e-mails and other items taught to you in *Learning Basic Profiles*. Use your rolodexes, make some phone calls, or use other resources to update these profiles for you and your agency's marketing program.

### **Exercise #3: Create Your Top 20 Profiles if None Exist in ClientBase**

If no profiles exist in ClientBase, create new profiles for your top 20 customers, and fill out the fields you learned about in this lesson.

# Packet One: Learning Basic Profile Skills

**GOAL:**

Use reports to monitor agents' profile progress.

**What to do next?**

See *Additional Resources*.



## Monitor Results (Inspect What You Expect!)

After you have taught agents basic profile skills, use reports to monitor their progress. Review and discuss results with agent as soon as possible:

- Query daily for previous day's newly updated profiles (use *Profiles Updated Yesterday* folder you created in setup).
- Run Reports to check agents' progress (see samples on back):
  1. User Stats Report on Profiles Updated: Click saved folder, *Profiles Updated Yesterday*, and go to **Reports|Profile Reports|Statistics|User Stats** to run report showing profiles created and modified with a total number of updates by User.
  2. Completed Fields Reports on Profiles Updated: Click saved folder, *Profiles Updated Yesterday*, which contains modified profiles together with any new profiles agents created the day before, and go to **Reports|Profile Reports|Statistics|Completed Fields** to run report showing per user which fields were completed with percentages.
- Publish User Stats daily for all to view (for agent accountability).
- Review profile skills with those agents who need help.
- Randomly select an agent to sit with and observe usage.



### Sample User Stats Report on Profiles Updated Yesterday

ClientBase Plus - [Report]

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

MARY

# of Profiles Created	
Agent	0
Corporate	0
Leisure	4
Other	0
Vendor	0
	<hr/>
	4
# of Profiles Modified	
Agent	0
Corporate	0
Leisure	2
Other	0
Vendor	0
	<hr/>
	2
Total # of Updates	6

Page 2 of 2

Login Name=MARY Database=C:\gdb\Newtrain.gdb 585,484 KB 9/30/2003 9:33:37 AM 0 Alarms



### Sample Completed Fields Report on Profiles Updated Yesterday

ClientBase Plus - [Report]

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

Report: **Completed Field Statistics**  
 Agent: MARY  
 Date/Time: 9/30/2003 9:40:52 AM  
 Filter: \*\*\* General Info  
 Profile Create Date Between "9/29/2003" And "9/29/2003"  
 Profile Status Is Equal to Active

	Query Results	Matches	% of Results
Primary Address Line 1	6	6	100.00%
Primary Address Line 2	6	1	16.67%
Primary Address City	6	6	100.00%
Primary Address State	6	6	100.00%
Primary Address Zip Code	6	6	100.00%
Primary Phone	6	6	100.00%
Primary Fax	6	0	0%
Primary E-Mail	6	1	16.67%
Interface ID	6	3	50.00%
Salutation	6	1	16.67%
Primary Agent	6	2	33.33%
Referred By	6	6	100.00%

Page 1 of 1

Login Name=MARY Database=C:\gdb\Newtrain.gdb 584,440 KB 9/30/2003 9:41:01 AM 0 Alarms

# Packet One: Learning Basic Profile Skills

## GOAL:

*To provide In-House Trainer and Agents to additional resources available to learn basic profiles.*

## What to do next?

*See Profile Skills Enhancement.*

## Additional Resources

Here is a list of additional resources available from TRAMS, Inc. to help you and your agents learn basic profile skills:

### □ For the In-House Trainer:

1. From ClientBase program, click **Help Files|Content:**
  - a. Read *Setting Up ClientBase for Your Agents*
  - b. Read *An In-Depth Look at Profiles*
2. From **www.trams.com|Training:**
  - a. Attend live WebEx classes: the daily Q&A, *Customizing User Permission at Agency, Branch and Agent Level*, or *Using ClientBase to Build Profiles* at CBPlus WebEx link.
  - b. Listen to short recordings on setup on *CBPlus CBI Modules* link.

### □ For the Agents:

1. From ClientBase program, click **Help Files|Content:**
  - a. Read *An In-Depth Look at Profiles*
2. From **www.trams.com|Training:**
  - a. Attend live WebEx class, *Using ClientBase to Build Profiles* at CBPlus WebEx link.
  - b. Listen to short recordings on profiles on *CBPlus CBI* link.
  - c. Attend *daily Q & A Sessions* WebEx sessions.

# Packet One: Learning Basic Profile Skills

## GOAL:

*To teach agents additional profile skills.*

## What to do next?

*Start preparing to train on Merge to PNR packet.*

## Skills Enhancement

As agents become more comfortable in entering basic profile information, you may want to teach them additional skills:

- How to enter Second Addresses
- How to enter Bill To/Ship To/Additional Addresses
- How to enter different communication entries and link to specific family member names
- How to enter Special Dates
- How to associate cards with specific family member names
- How to use Referred by field
- How to enter additional information for Family Members:
  - o Birthday
  - o Passports
  - o Communication Entries
  - o Traveler Preferences
- How to enter basic information to Marketing Tab

# Packet Two: Learning Merge to PNR

## GOAL:

Teach agents basic concept of Merge to PNR.

## What to do next?

See PNR Setup.



## Overview

You will discover that your database grows rapidly once your agents are trained on the practical applications of ClientBase. Using Merge to PNR provides an everyday tool that demonstrates the value of the program to your agents. In this second packet, **Learning Merge to PNR**, you are teaching the agents to master the following associated skills:

- How to toggle back and forth between the CRS and ClientBase.**
- How to initiate the Merge to PNR process using one of two methods.**
  - Start in the CRS by checking availability and booking flights. Toggle into ClientBase, display or build a new profile and merge customer data to the PNR.
  - Start in ClientBase and search for profile. Display or build a new profile and merge data to PNR. Toggle into CRS to check availability and book flights.
- How to use the Merge to PNR Feature.**
  - **Selection Screen**
    - How to use Merge to PNR feature *Selection Screen*
    - *Always Move/Optional Move* selections
    - Dragging passengers to desired PNR name field position
    - Click *Next*
  - **PNR Preview Screen**
    - Update in CRS format
    - *Finish*
- How to toggle and review merged data in PNR.**

# Packet Two: Learning Merge to PNR

## GOAL:

*Setup ClientBase before teaching agents Merge to PNR.*

*What to do next? See PNR Class Outline*



## Setup

Before teaching agents basic how to Merge to PNR, you need to setup ClientBase (see back for details):

- 1) Go to **Global Defaults|PNR Settings** and set up ClientBase for use with your Res System/s.
  
- 2) Go to **Global Defaults|PNR Rules** and review 6 pre-defined rules, and modify as needed for your CRS.
  
- 3) Go to **Global Defaults|PNR Rules** and create a UDID Rule to track PNRs created from ClientBase (optional).

**Note:** Eventually you will want to enter all your Branch and Agent PNR entries into ClientBase that are being used in the Hot Keys, Ready Keys or Programmable Keys in the CRS. If you want to get agents started right away (which is suggested) with Merge to PNR, start with simple setup steps above.



## Setup **Merge to PNR** for Each Res System

**Setup Merge to PNR for Each Res System:** Go to **Global Defaults|Merge to PNR Settings**. Select the reservation system for your agency from the pull-down menu. The **Special Keys** are the characters especially designed for your CRS system. Since these special characters may be used when formatting your data in ClientBase, it's important to include any you want to use in the Special Keys field. If any are missing, click on Special Keys and find the special character to bring into ClientBase. Any Special Keys captured here are made available on a tool bar when creating PNR Rules or entering PNR entries into any of the PNR entry tables. We suggest leaving the Select Font and Size default.

The **Order of Entries** is a listing of all possible PNR Rules and Entry Tables in the order that they will merge to the PNR. This order should be changed only if you are having problems during the Merge routine. **Use Clipboard** - the Windows clipboard method is used to copy/paste data to a PNR if ClientBase does not have a way to transmit data directly to the GDS PNR. How ClientBase works with each GDS varies. **Amadeus:** Leave the "Use Clipboard" unchecked if you are using the APS or Vista platforms of Amadeus. ClientBase uses the APS (Amadeus Plus Script) tools to Merge to an Amadeus PNR. You must first contact Amadeus and activate the Plus Script feature for your agency for this feature to work. Although Amadeus normally charges a fee for this Plus Script activation, advise them you are a TRAMS customer and the fee is waived. **Apollo/Galileo:** Leave "Use Clipboard" unchecked. **Sabre:** If you are using Sabre for Windows then leave the "Use Clipboard" unchecked. If you are using the Webtop platform then check "Use Clipboard". **Worldspan:** Leave "Use Clipboard" checked.

When checked off, **Send as one transmission** (if applicable to your CRS) strings together with end items as many entries as possible. This reduces the number of hits and potentially the delay created by transmitting each line separately. Please note that Sabre only allows 30 entries strung together in one transmission, so depending on the number of entries included in a given Merge to PNR, the entries may be broken into multiple transmissions. Click **OK** to Save Settings.



## Modify **PNR Rules** & Setup Rule for UDID

**Modify Default PNR Rules:** ClientBase comes with default entries for all the main PNR entries for each CRS. A Rule is simply a way of designating how certain fields of information captured in a profile should be formatted when sent to a PNR. ClientBase comes defaulted with 6 standard rules for each CRS, formatted for sending the following fields of profile data: Bill To Address, Ship To Address, Interface ID, Phone Numbers, Credit Cards, Frequent Flyer Numbers, and E-mail. If any of these entries need modifying, do so by going to **Global Defaults|Merge to PNR Rules**. Click the rule to edit, and then **Modify**. **Handling Blank Merge Fields:** When setting up rules in ClientBase, you may choose to include Merge Fields that aren't always completed in every record. If the field is completed, you want it included, but if it's not, you don't want to include the formatting with a blank space. To handle this, the PNR Rules allow you to use the left and right brackets [ ] to surround a set of characters within a rule, and designate that if the merge field within those brackets is blank, then don't include any of the characters between the brackets.

**Create a UDID Rule:** Click **Add** to add a new PNR Rule, entitled **UDID**, and select the **Field Group, Miscellaneous**. Leave check **Always Move this Rule**, but uncheck **Display on Selection Screen**. Enter the exact format to be entered in the PNR when this rule is selected using the combination of free-flow text, special characters, and the merge field, **Profile Number**, from the list of available fields. We suggest using UDID number 5 or any number you are not already using (1-99) in TRAMS Back Office or your accounting program.

# ClientBase Packet Two: Learning Merge to PNR

ClientBase QuickStart  
Customized Turnkey Program

Merge to PNR Class Outline

**GOAL:**  
*Teach agents how to Merge to PNR.*

**What to do next?**  
**See Monitor PNR Results.**



## Class Outline

After setup, you are ready to hold a staff meeting. Photocopy, pass out *Agent Handouts*, and teach Merge to PNR:

**In-House Trainer Review: How to edit/create Profiles. (3 minutes)**

Quick review of key applicable fields such as Bill To/Ship To addresses, communication entries, traveler names, credit cards, frequent flyer #'s, etc.

**In-House Trainer Intro: Why use Merge to PNR and how does this benefit the agency and agents? (2 minutes)**

- Saves me time when I create a PNR for clients who don't have a CRS profile.
- Adds details to the PNR in much the same way as a CRS profile would.
- With every profile built, the agency's marketing database has been verified/updated. This is the key to successful marketing programs.
- All client details are merged in a uniform, standardized format, regardless of the agent.
- If the agency has multiple reservation systems, only one profile needs to be maintained and data is converted to the applicable CRS formats.
- More efficient for accounting (TRAMS Back Office) if PNR is started in ClientBase, as the back office Interface ID is automatically sent to PNR.

**In-House Trainer Discussion: How do I toggle between open PNR and ClientBase? What are two methods to use Merge to PNR? (4 minutes)**

- Start by checking availability in the CRS. Toggle into ClientBase and search for an existing profile. If found, verify data is current and accurate. If none found, create a new one. Merge to PNR.
- Search for an existing profile in ClientBase. If found, verify data is current and accurate. If none found, create a new one. Merge to PNR. Toggle back to CRS and check availability.

**In-House Trainer Demonstration: Step-by-step how to Merge to PNR. (8 minutes)**

- Search for profile either prior to doing availability in CRS, or after.
- Verify client data and that a Bill To/Ship To address exists.
- Merge to PNR.
- Review Selection Screen. Select and unselect as desired.
- Show how to move passenger to desired PNR position by dragging and dropping.
- Review *PNR Preview Screen*, explaining how to make changes.
- *Finish* and explain process of clipboard or API.

**In-House Trainer Demo: How to toggle back to CRS to review merged data, check for errors, and display PNR. (2 minutes)**

**Q & A Session. (Cap 5 minutes)**

**In-House Trainer Hands On: Have agents practice new skills by merging to PNRs (see Agent Handouts). (10 minutes or have them do one or two, then practice on their own.)**

**In-House Trainer Sets Expectations: Expectation is that all PNRs will now be created from ClientBase. (1 minute)**

**I Needed Help.**  
**I was disorganized.**  
**I was overworked.**  
**I wasted too much time looking for**  
**files, phone numbers and information.**



**ClientBase Helped!**

**ClientBase**

Learning Merge to PNR  
Agent Handouts



# Save Time and Duplication with Merge to PNR



No more multiple entries or databases! *ClientBase* provides with the ability to move customer information (maintained in the *ClientBase* profile) to your reservation system's PNR. This feature works with Amadeus, Apollo/Galileo, Sabre, and Worldspan. Sit back and watch your database grow and watch yourself become more efficient by using your marketing database to build PNRs. You'll be surprised at how quickly existing customer information gets updated, and how quickly new customer information gets added to your marketing database, when agents use it as their source for building PNRs. Also, watch your customer loyalty grow as agents access customer information when building PNRs for your leisure clients, rather than repeatedly asking them for the same information.

**Example:** Michael Blue calls your agency to book some flights to Paris. You first locate Michael's profile in your marketing database (*ClientBase*) and verify current address and phone information. Once confirmed, click the Merge to PNR button and within moments has the PNR started with all of Michael's necessary information.

The screenshot shows the 'ClientBase Plus' interface for a customer profile. The main window displays the following information:

- Customer: Mr. And Mrs. Michael Blue
- Address: 3020 Alma Ave., Manhattan Beach, CA 90266
- Phone: +1 (213) 374-6392
- Primary Agent: James Smith
- Created: 10/28/2013
- Interface ID: 2133746392
- Profile No.: 162

The 'PNR Builder' window is open, showing the following entries:

Profile Entries	Passenger Entries	Branch Entries
<input checked="" type="checkbox"/> Bill To Address	<input checked="" type="checkbox"/> BLUE/LOUANA	<input checked="" type="checkbox"/> 5WAFter Hours Service Call 800
<input checked="" type="checkbox"/> S/MR AND MRS MICHAEL BLUESS	<input checked="" type="checkbox"/> BLUE/MICHAEL MR	
<input type="checkbox"/> Ship To Address	<input checked="" type="checkbox"/> Credit Cards	
<input type="checkbox"/> SDL-MR AND MRS MICHAEL BLUE	<input checked="" type="checkbox"/> 5-*AX3713 8056 1005 623 1	

The 'PNR Preview' window shows the resulting PNR text:

```
PNR Preview
S.S*SASMH
S.S*DP40
S/MR AND MRS MICHAEL BLUESS/3020 ALMA AVES/MANHATTAN BEACH CA 90266
9213-374-6392-P
-2BLUE/LOUANA/MICHAEL MR
S-*AX3713 8056 1005 623 11/30/09+11/03$CC/N/H BLUE+A/3020 ALMA AVE +C/MANHATTAN
S.SAN2133746392
5WAFter Hours Service Call 800-555-1212
```

**GOAL:**

To learn how to Merge to PNR.

**What to do next?**

Practice, Practice, Practice!



## Cheat Sheet

Steps for successfully using Merge to PNR:

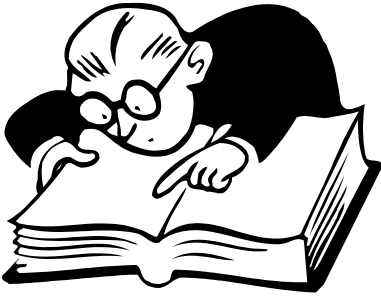
**Start by checking availability in the CRS.** Toggle into ClientBase and search for an existing profile. If found, verify data is current and accurate. If none found, create a new one.

- Verify that client data is correct and a Bill To and Ship To address exists.
- Merge to PNR.
- Review Selection screen. Select and unselect as desired.
- Arrange passenger names to desired PNR position by dragging and dropping.
- Click *Next*.
- In PNR Preview Screen, update in CRS format.
- *Finish*.
- Toggle and review merged data in PNR

**OR**

**Start in ClientBase.** Search for an existing profile. If found, verify data is current and accurate. If none found, create a new one.

- Verify that client data is correct and a Bill To and Ship To address exists.
- Merge to PNR.
- Review Selection screen. Select and unselect as desired.
- Arrange passenger names to desired PNR position by dragging and dropping.
- Click *Next*.
- In PNR Preview Screen, update in CRS format.
- *Finish*.
- Toggle and review merged data in PNR and check availability in CRS.



## Let's Practice!

**Role Playing** (Team up with another agent. One of you is customer, and one of you is Merging to PNR):

**Exercise #1: Start by doing availability in the CRS and toggle back into ClientBase to modify/add new profile information.**

- o If customer is in database, ask them if they still reside at this Address, is that still the phone number, may I add your e-mail address? Then *Merge to PNR*. Select the passengers and any information you want to merge to the PNR. Complete the merge and continue the PNR.
- o Repeat exercise, but now customer is not in database. How will you ask for information you need for your customer database?

**Exercise #2: Start in ClientBase and toggle back into blank PNR to continue availability process.**

- o If customer is in database, ask them if they still reside at this Address, is that still the phone number, may I add your e-mail address? Then Merge to PNR. Select the passengers and any information you want to merge to the PNR. Complete the merge and continue the PNR.
- o Repeat exercise, but now customer is not in database. How will you ask for information you need for your customer database?
  1. Example 1: Hi my name is Susan Anderson, and your name is?
  2. Query for the client's profile. If they are in the system, say "I see you've booked with us in the past. Are you still at this address? Are you still at this phone number? I see I don't have an e-mail for you, may I have that please?" (This way the client thinks you "remember" them. If not in system, create a new profile by saying, "Can I get your name and your phone number please? "

# Packet Two: Learning Merge to PNR

**GOAL:**  
Use UDID report to monitor agents' Merge to PNR progress.

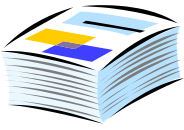
**What to do next?**  
See Additional Resources.



## Monitor Results (Inspect What You Expect!)

After you have taught agents basic Merge to PNR skills, use reports to monitor their progress. Review and discuss the results with agents as soon as possible:

- In TRAMS Back Office (or any back office program) run a UDID report with appropriate parameters to track how many agents have been using Merge to PNR from ClientBase.
  - In TBO, go to **Reports|Report Generator|Print Report**, and select *Client Activity Detail Report*. Put in date parameters (day before) in *Issue Date Range From & To*. Under the Advanced Tab, Select *UDID 5*. In *Inside or Outside Agent*, type name of agent. The report, which is run, is every invoice that was created in date range for UDID #5, per agent. (By batching this report in TBO for each agent, you need only set this up once and get a report on each agent's production.)
  - You can create a customized report in *TBO Report Generator*, selecting the columns you want to see including Agent, so you only need to run one report.
- Publish Report Stats daily for all to view (for agent accountability) using the percentage of PNRs started from ClientBase.
- Review Merge to PNR skills with those agents who need help.
- Randomly select agents to sit with and observe usage.



## Sample User Report on Merge to PNR (TRAMS Back Office)

### Setup UDID Report:

**Report Generator - Advanced Tab**

Report: C:\Program Files\Tramswin\Reports\CL\_AD. Format: Report

Date Range: Issue Dt Between 10/5/2003 And 10/5/2003

Invoice Type: [All] Branch: [All]

Submit To: [All] Hdr Format: Report

Travel Type: [All]

Ticket Type: [All]

E-Ticket Status: All

Passenger Name: [ ]

Invoice Payment Status: Client [Open/Closed/N/A] Vendor [All]

Client Name: [ ] Vendor Name: [ ]

Print Selection Criteria  Page Break on Sort Change

Buttons: Preview, Print, Printer Setup, Reset

---

**Report Generator - Advanced Tab (Detailed)**

Client Remarks: [ ]

Vendor Remarks: [ ]

UDID Selection: **UDID 5**

Department: [ ]  Use Department From Profile

Flown Carrier: [ ] Validating Carrier: [ ]

City: [ ] Origin/Destination: [ ] / [ ]

**Inside Agent: SMM** Outside Agent: [ ]

IC Code: [ ] Host Code: [ ]

Cross Reference: None Sub Title: [ ]

Font: [ ] Font Size: [ ]

Print first xx items: [ ]

Groups: Client [ ], Vendor [ ], Invoice [ ], Inside Agent [ ], Outside Agent [ ]

Booking Dates: From [ ] To [ ]

Depart: [ ] Return: [ ] Final Pau: [ ]

Buttons: Printer Setup, Reset, Default, Close

**Customized UDID 5 Report in TBO**

The Travel Company  
5777 W. Century Blvd.  
Suite 1200  
Los Angeles, CA 90045  
(310) 641-8726

Client Name	Invoice	Profile #	Agent	Total Fare
Hinez/Bob	90335S	12345	SMM	1,557.00
McBean/Harry	90336S	11005	SMM	375.00
Smith/Susan	90334S	12347	SMM	1,352.00
	90337S	10455	SMM	1,500.00
				-----
				2,852.00
				-----
				<b>4,784.00</b>

**GOAL:**

*To provide In-House Trainer and Agents with additional resources to learn Merge to PNR.*

**What to do next?**

*See Skills Enhancement.*

## Additional Resources

Here is a list of additional resources available from TRAMS, Inc. to help you and your agents learn basic Merge to PNR skills:

**□ For the In-House Trainer:**

2. From ClientBase program:
  - a. In **Help Files|Contents**, click *Setting Up ClientBase for Your Agents*, see Merge to PNR area.
  - b. In **Help Files|Index**, type in *PNR* and click on *PNR* entry topic.
2. From **www.trams.com|Training**:
  - a. Attend live WebEx classes: *Setting Up PNR Rules and PNR Entries*.
  - b. Listen to short recordings on PNR setup on *CB Plus CBI Modules* link under Training link.

**□ For the Agents:**

2. From ClientBase program, click **Help Files|Index**:
  - a. Type in *PNR* and select, *Using Merge to PNR*.
2. From **www.trams.com|Training**:
  - d. Attend live WebEx class, *Using Profiles to Build a PNR* at CBPlus WebEx link.
  - e. Listen to short recordings on Merge to PNR area on *CB Plus CBI Modules* under Training link.
  - f. Attend daily live WebEx *Q & A Sessions*.

# Packet Two: Learning Merge to PNR

ClientBase QuickStart  
Customized Turnkey Program

PNR Skills Enhancement

## GOAL:

*To teach agents additional PNR skills.*

## What to do next?

*Start preparing packet, Updating Marketing Preferences.*

## Skills Enhancement

As agents become more comfortable in entering using the Merge to PNR feature in ClientBase, you may want to:

- Create PNR entries at Branch Level.
- Create PNR entries at Agent Level.
- Teach Agents how to create PNR entries and uses at the Passenger (Family Member/Employee) Level.
- Teach Agents how to create PNR entries and uses at the Profile Level.
- Explain the significance of the name field association in Profile Cards Tab.

# Packet Three: Updating Marketing Codes

ClientBase

ClientBase Plus QuickStart  
Customized Turnkey Program

Marketing Codes Skills Overview

## GOAL:

*Teach agents how to update marketing codes.*

## What to do next?

*See Setup.*



## Overview

Tracking your clients' travel preferences is simple when a checklist of marketing codes is available to select from. The Marketing Tab in the ClientBase profile makes it easy for agents to check off client demographics and preferences. These codes can then be used for future marketing and to help agents qualify clients for new trips.

In this third packet, **Updating Marketing Codes**, you are teaching the agents to master the following skills:

- To update client profiles with Marketing Codes which reflect travel interests.**
  
- Profile Marketing Tab Screen**
  - Scroll up and down
  - Add/delete codes
  - Summary Marketing Code Tree (how to use)
  
- Using Marketing Codes to qualify clients**
  
- How to run client surveys and use them to gather large amounts of information about clients.**

# Packet Three: Updating Marketing Codes

ClientBase Plus QuickStart  
Customized Turnkey Program

Marketing Codes Setup

## GOAL:

Setup ClientBase before teaching agents how to update marketing codes.

## What to do next?

See Class Outline.



## Setup

Before teaching agents Updating Marketing Codes, you need to setup ClientBase Plus (see back for details):

- 1) Add/Modify/Delete *Marketing Categories* in ClientBase Plus by going to **Global Defaults|Marketing Categories**.
- 2) Add/Modify/Delete *Marketing Codes* by going to **Global Defaults|Marketing Codes**.
- 3) Customize the default *Customer Survey* and add a header/footer by going to **Global Defaults|Headers/Footers|Reports**.
- 4) Customize the default *Customer Survey Settings* by going to **Global Defaults|Client Survey Settings**.
- 5) Login as SYSDBA, go to **Utilities|User Logins|User List** and for each agent, click the *Profile Tab|Leisure*. Select the Marketing tab. This opens the Marketing tab every time a Leisure profile is displayed. Once displayed it acts as a reminder for agents to update the marketing information and use the details to qualify the clients for travel.

**Important Note: Check with your consortium before changing branded categories and codes.**



## Setup *Marketing Categories/Codes*

### **Tailor the name of each *Marketing Category*.**

From the main ClientBase Plus screen, click on *Global Defaults* and then select *Marketing Categories*. Each table, or group of Marketing Codes, found in the Marketing tab is considered a Marketing Category. We helped you get started by naming the first 7 Categories, although each Marketing Category name can be modified. To modify the table name of any of the Marketing Categories, highlight the Marketing Category and click *Modify*. A window appears prompting you for the Category Name. Enter the desired Category Name and click *OK* to save. To add a Marketing Category, click *Add* and enter the new name.

### **Tailor the *Marketing Codes* included in each *Marketing Category*.**

From the Main ClientBase Screen, click **Global Defaults|Marketing Codes**. A list of any Marketing Codes already setup in the system appears, including the category name and the code value. From here you can Add, Modify or Delete Marketing Codes.

- a. To Add a Marketing Code:** Click *Add*, select the appropriate Marketing Category, then enter the desired code name in the field called Marketing Item. Use the up and down arrows to place the code in a desired location.
- b. To Modify a Marketing Code:** Highlight the Marketing Code you would like to modify, then click *Modify*. Enter the desired code name in the field called Marketing Item. If any profiles have been coded with this item, the system prompts before saving.
- c. To Delete a Marketing Code:** Highlight the Marketing Code you would like to delete, then click *Delete*. If any profiles have been coded with this item, the system prompts before deleting.

**Note:** The category cannot be deleted if there are any checked Marketing Codes attached. A warning message appears advising you of the number of profiles with that marketing code attached. Any checked Marketing Codes have to be deleted from the marketing category before the category can be deleted. You can do this globally by using the Global Modify feature.



## Customize *Travel Survey*

1. Using directions from the Help Files by clicking on *Header/Footer* in the **Help Files|Index** and create a Header/Footer for the survey by going to **Global Defaults|Headers/Footers|Reports**.
2. Go to **Global Defaults|Client Survey Setting**. Users may define what marketing tables and codes are included on the Client Survey printout generated by ClientBase Plus. Highlight any marketing tables that you do not want included in the Client Survey and click the left arrow to move them off of the list of *Marketing Categories in Client Survey*. You also have the option of *Print only codes selected for profile*, which when selected, does not print all Marketing Codes available, but just the codes selected for the profile for which you are printing your Client Survey. These Global Defaults can be overwritten each time you print a Client Survey. Client Surveys can be printed one at a time from within a client profile by clicking the Printer icon on the profile toolbar, or multiple surveys can be printed from the results of a query, by going to **Reports|Profile|Client Survey**.

**GOAL:**

Teach agents how to get started with Updating Marketing Codes.

What to do next?  
See Monitor Results.



## Class Outline

After setup, you are ready to hold a staff meeting. Photocopy, distribute *Agent Handouts*, and teach Updating Marketing Codes:

**In-House Trainer Intro: How does Updating Marketing Codes in ClientBase Plus benefit agents? (2 minutes)**

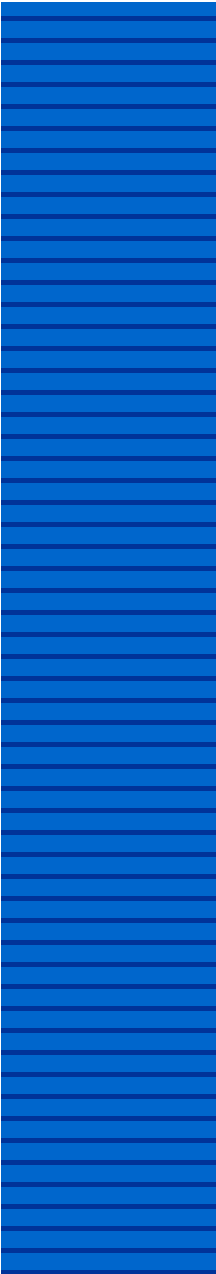
- Helps agents to qualify clients
- Agency can perform target marketing to get right product to the right customers
- Agents can do target marketing to their own clients
- Agents can be pro-active with their own client lists to stimulate travel

**In-House Trainer Discussion: Review the Marketing Tab screen. (5 minutes)**

- Scroll up and down
- Add/delete codes (explaining life cycle of a client and how these codes change)
- Use of the *tree* on the left hand side of the screen (at a glance, agents can view the interests of the client)

**In-House Trainer Discussion: Review of Marketing Categories and Codes. (5 minutes)**

- Review and define any codes that might be open to interpretation
- Ask for suggestions from agents on what codes they feel are missing



□ **In-House Trainer Discussion: Populating Marketing Tab by Printing a Travel Survey: (5 minutes)**

- What is a travel survey (alternative to asking a series of questions)
- How to run survey with *Print Only Codes*
- What it accomplishes (gathers large amounts of information about a client at one time)
- Valuable for existing client to update or a new client to populate information which can be used:

□ **In-House Trainer Discussion: Populating Marketing Tab by talking with Client: (8 minutes)**

- During sales process
- During Welcome Home call
- Listen during a conversation with a client, take notes, update profile

□ **Q & A Session. (Cap at 8 minutes)**

□ **In-House Trainer Hands On:** Have agents practice new skills by calling up existing profiles and adding codes and by using role playing (see Agent Handouts) **(10 minutes or practice on own)**

□ **In-House Trainer Sets Expectations:** Whenever an agent has contact with a customer and picks up on an interest while booking a trip, doing a welcome home call, or just in general conversation, agent checks off marketing code in Profile Marketing Tab. **(2 minutes)**

**I Needed Help.**  
**I was disorganized.**  
**I was overworked.**  
**I wasted too much time looking for**  
**files, phone numbers and information.**



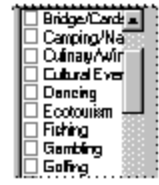
**ClientBase Helped!**

**ClientBase**

Updating Marketing Codes  
Agent Handouts



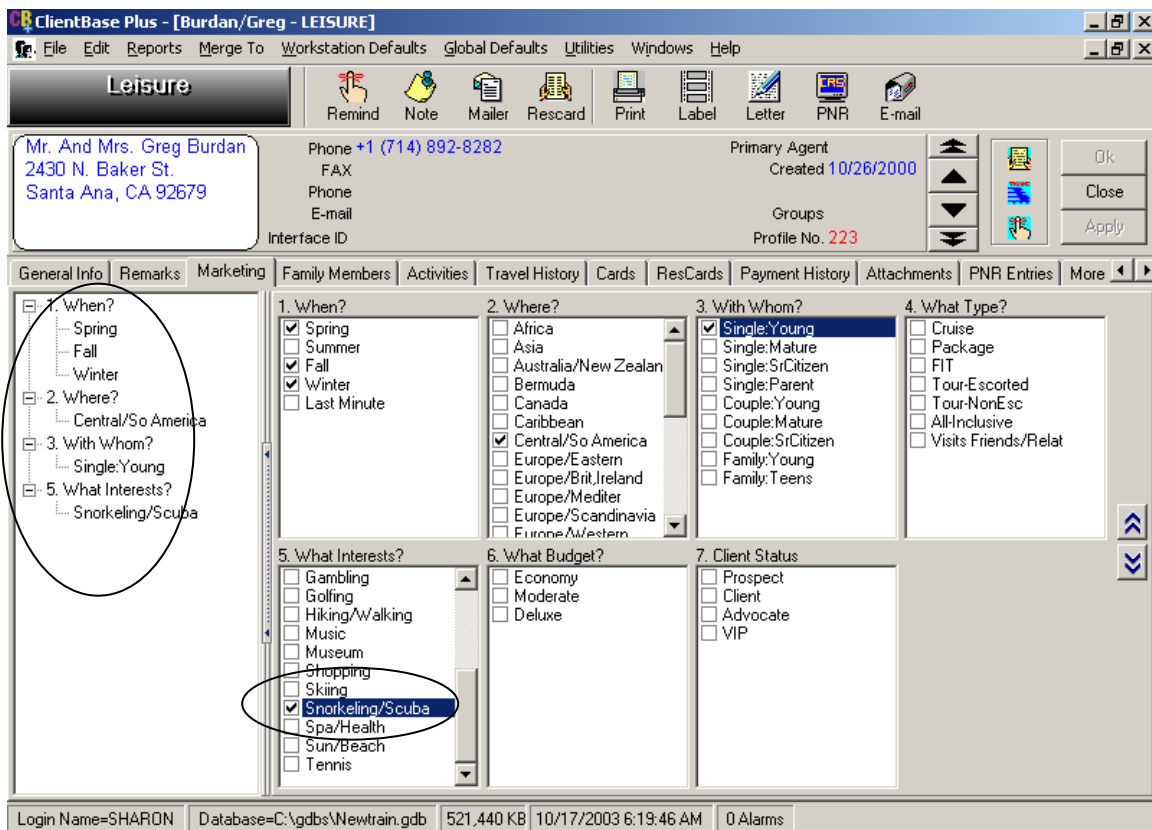
# Streamline Marketing with Point-and-Click Codes



The Marketing Tables in *ClientBase Plus* helps you identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. Since qualifying a customer for a leisure vacation can be the toughest part of selling leisure travel, access to this valuable information might just make the difference between closing a sale or losing it. These Marketing Codes make it possible to consistently put the right product in front of the right client by both front-line agents and any marketing programs geared towards generating travel interest.

In addition, labels, letters, and E-mails are quickly created to link clients and travel preferences when a "hot" travel special lands on your desk. A master set of marketing tables appears in every client's profile under the *Marketing* folder. Eight of these tables come with pre-defined default codes, but all of them can be customized to meet your agency needs. With a simple point-and-click with the mouse, every agent selects from the same list, and that means client consistency and agent simplicity.

**Example:** Greg Burdan calls in and requests some information on a trip to the Cayman Islands. He read about the great destination in his favorite *Scuba Weekly* magazine and figures it would be a great place for a honeymoon (may as well squeeze in some diving). By clicking on the Marketing Tab in Greg's profile, the agent easily places a checkmark in the box next to *Scuba/Snorkel* under the *What Interests* Table. Now, when your agency has a scuba or snorkeling-related itinerary to promote, rest assured that Greg will be included among the other qualified clients you are tempting with the great deal!



## GOAL:

To learn how to update marketing codes.

## What to do next?

Practice,  
Practice,  
Practice!



## Cheat Sheet

Steps for successfully using Marketing Codes:

- 1. **With every customer contact, query (search) for profile** and update customer information or create a new profile.
- 2. As you are talking with the client, if there is anything checked off in the marketing table, use this information to *Qualify* the customer.
- 3. If a client books or inquires about a particular trip, click the marketing code that reflects this interest for future marketing.
- 4. If a client is waiting for you while you check on availability, print out a client survey and ask for an update of his travel preferences. That's a great way to quickly add new Marketing Codes to your database.

**See diagram.**

**Sample Profile Marketing Tab with Interests Selected for Qualifying Your Customers:**

Print Travel Survey Here

**ClientBase Plus - [Able/Ken And Sue - LEISURE]**

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

**Leisure** Remind Note Mailer Rescard **Print** Label Letter PNR E-mail

Mr. And Mrs. Ken And Sue Able  
1255 East Apple Street  
Los Altos, CA 94022

Home +1 (310) 514-0518  
Cell +1 (310) 565-7777  
Business +1 (310) 654-4545  
E-mail kena@aol.com  
Interface ID 6509881222

Primary Agent Sharon Mey  
Created 10/21/1997

Groups LA LIONS  
Profile No. 384

General Info Remarks Marketing Family Members Activities Travel History Cards ResCards Payment History Attachments PNR Entries More

2. Where?  
 Europe/Brit,Ireland  
 USA/Hawaii

3. With Whom?  
 Couple:Mature

4. What Type?  
 Cruise  
 Package  
 FIT  
 Tour-Escorted  
 Tour-NonEsc  
 All-Inclusive  
 Visits Friends/Relat

1. When?  
 Spring  
 Summer  
 Fall  
 Winter  
 Last Minute

2. Where?  
 Africa  
 Asia  
 Australia/New Zealan  
 Bermuda  
 Canada  
 Caribbean  
 Central/So America  
 Europe/E eastern  
 Europe/Brit,Ireland  
 Europe/Mediter  
 Europe/Scandinavia  
 Europe/Western

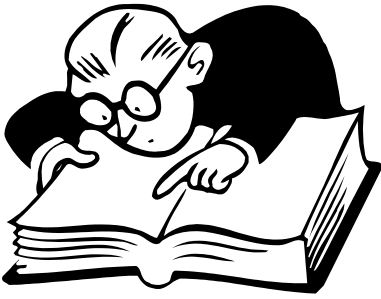
3. With Whom?  
 Single:Young  
 Single:Mature  
 Single:SrCitizen  
 Single:Parent  
 Couple:Young  
 Couple:Mature  
 Couple:SrCitizen  
 Family:Young  
 Family:Teens

5. What Interests?  
 Adventure  
 Bicycles  
 Boating/Sailing  
 Bridge/Cards  
 Culinary/Wine  
 Cultural Events  
 Dancing  
 Ecotourism  
 Fishing  
 Gambling  
 Golfing  
 Hiking/Walking

6. What Budget?  
 Economy  
 Moderate  
 Deluxe

7. Client Status  
 Prospect  
 Client  
 Advocate  
 VIP

Login Name=SHARON Database=C:\gdb\Newtrain.gdb 551,976 KB 10/17/2003 6:03:27 AM 0 Alarms



## **Let's Practice!**

### **Exercise #1: Update Marketing Codes**

- o Query your own Agent Profile, and mark yourself as a married couple, deluxe cruiser who likes to ski, and cruise. Save.
- o Now query your profile back up and uncheck ski, and check scuba diving. Watch what happens on the left side of your screen! Save.
- o Now query your profile and add/delete any Marketing Codes that really do pertain to you and your family.
- o Print out a travel survey on the screen for yourself. Notice what this looks like for what you've selected.

### **Exercise #2: Role Play**

1. Partner up with another agent in your office who has done exercise #1. Call up his/her profile and practice qualifying the customer by using the Marketing Codes that you see checked off in the Marketing Tab.
  - o Example 1: I see you like to cruise, are you planning one soon?
  - o Example 2: You're a skier. Have you heard about our Aspen Ski Promotion this winter?
2. Reverse roles.
3. Practice a welcome home call with your partner, asking them what they liked and disliked about the recent trip and update the marketing tables as you are talking.

Reverse roles.

## GOAL:

*Monitor agents' use of Marketing Codes.*

## What to do next?

*See Additional Resources.*



## Monitor Results (Inspect What You Expect!)

After you have taught agents how to update marketing preferences, here are some ideas for tracking their progress:

- Randomly select an agent to sit with and observe usage of Marketing Table.
  
- Review Updating Marketing Codes with those agents who need help.

## GOAL:

Provide additional resources for you to teach Updating Marketing Codes.

## What to do next?

See Skills Enhancement.

## Additional Resources

Here is a list of additional resources available from TRAMS, Inc. to help you and your agents learn basic profile skills:

### □ For the In-House Trainer:

3. From ClientBase program:
  - a. In **Help Files|Contents**, click *An In-Depth Look at Profiles, Marketing Tab* section, and *Tools to Maintain a Healthy Database, the Global Modify* section.
  - b. In **Help Files|Index**, type in *Marketing Codes* or *Marketing Tables*.
2. From **www.trams.com|Training**:
  - c. Listen to short recordings on *Marketing Tab* in the Profile section on *CB Plus CBI Modules* area under Training link. In the Setting Up section, listen to recording on *Setting up Marketing Categories & Codes*.
  - d. Attend daily Q & A WebEx Sessions.

### □ For the Agents:

3. From ClientBase program, click **Help Files|Index**:
  - a. In **Help Files|Contents**, click *An In-Depth Look at Profiles, Marketing Tab* section.
2. From **www.trams.com|Training**:
  - a. Listen to short recordings on *Marketing Tab* in the Profile section on *CB Plus CBI Modules* area under Training link.
  - b. Live WebEx class - *Using Queries to Increase Sales on the Agent Level* (reviews using Marketing and Queries with Marketing Codes)
  - c. Attend daily Q & A WebEx Sessions.

## GOAL:

*To provide trainer with additional marketing codes skills.*

## What to do next?

*Start next packet, Getting Started with Reminders & Res Cards.*

## Skills Enhancement

As the in-house trainer, here are additional skills to enrich the agency database by adding marketing codes to multiple profiles at one time.

Use **Global Modify** to add codes to multiple clients (for TRAMS Back Office users).

### Examples:

- In Level 2 Travel History Query, call up profiles of clients who have traveled with a travel category of Cruise, and use **Utilities|Global Modify** the Marketing Codes with Cruise in those profiles.
- In Level 2 Travel History Query, call up profiles of clients who have traveled with a particular vendor, such as Crystal Cruises, and globally modify the Marketing Codes with Deluxe in those profiles.
- In Level 2 Group Query, call up profiles of clients who have traveled in a particular group and globally modify the Marketing Codes in those profiles to reflect interests of that group. A ski group would all have skiing as a marketing code.

# ClientBase Packet Four: Getting Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Reminders & Res Cards Skills Overview

## GOAL:

Teach agents basic creation and use of Reminders & Res Cards.

## What to do next?

See Reminders Setup.



## Overview

Wouldn't it be great if your agents had a simple way of tracking each new trip inquiry that came into the agency, and a systematic approach to following up to close the sale? Managers could actually see how many inquiries came in on a given day or week, and see the sales follow-up status. Agents would close more sales. With ClientBase Res Card and Reminder features, these tools are now at your fingertips. In this fourth packet, **Getting Started with Reminders & Res Cards**, you are teaching the agents to master the following skills:

- How to create Reminders in conjunction with Res Card. Whenever a customer makes a trip inquiry, an agent should:**
  - Update/Create Profile & Create Res Card
  - *Agent Name* Required; *Active Status* is default
  - Set Reservation Cycle to *Under Consideration*
  - Give trip a name & Identify region
  - *Apply* to save Res Card and stay in it
- How to create Reminder in Activity tab of Res Card to follow-up on sale:**
  - Create Reminder
  - Set a follow-up date
  - Use subject, *Trip Inquiry Follow-up* from drop-down menu
  - Use the alarm (optional)
- How to create a personal folder within the Activity Manager for each agent. This saved query defaults upon opening the Activity Manager for the agent's daily Reminders.**
- How to work off a To-Do List and close Reminders with either a reschedule or using *Completed* Field.**

# ClientBase Packet Four: Getting Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Reminder & Res Card Skills Setup

## GOAL:

Setup ClientBase before teaching agents how to create and use Reminders & Res Cards.

## What to do next?

See Class Outline.



## Setup

Before teaching agents the basics of creating and using the Reminders & Res Cards, you need to setup ClientBase (see back for details):

- 1) In the Activity Manager, setup a Global folder called ***New Trip Inquiry Follow-ups***. (You are going to use this folder to monitor the Reminders Agents are creating and Agents are going to edit this folder, and save it as a Personal Folder to use to view Reminders they create).
- 2) In the Activity Manager, setup a Global Profile Folder for ***Closed Trip Inquiry Follow-ups***. (Use this folder in your own login to check if Agents are following up on trips.)
- 3) From **Global Defaults|Required Fields|Required Res Card Fields** add **Required** for Trip Name and Res Cycle.



## Setup Two Activity Manager Global Folders

1. In Activity Manager, click **Level 2 Query Tab|Filter|Reset**. Check off *Reminders, Not Completed/Not Responded*, and in *Activity Date* leave *From* date blank & enter an = sign in the *To* field. Select *Trip Inquiry Follow-up* as the *Subject* from the drop-down menu. Click *OK* to save. Go to **File|Save Query As**, and save this query as a Global Folder entitled *New Trip Inquiry Follow-Ups*.

The screenshot shows the 'Activity Query Level 2' dialog box with the following settings: 'Reminders' is checked, 'Completed/Responded' is selected in the dropdown, 'Notes' is unchecked, 'Activity Date' has 'From' blank and 'To' set to '=', 'Duration' is blank, 'Login Name' is blank, 'Priority' is blank, 'Reminder Type' is blank, 'Create Date' is blank, and 'Subject' is set to 'Trip Inquiry Follow-Up'. The 'OK', 'Cancel', and 'Reset' buttons are visible at the bottom.

2. Go back into *Level 2 Query* and *Reset*. Check *Reminders* and under *Completed/Responded*, select *Completed/Responded* from drop-down list. In *Completed/Responded Date*, enter an = sign in *To* field only, and the *Subject* is *Trip Inquiry Follow-up*. Click *OK* to save. Go to **File|Save Query As**, and save this query as a Global Folder entitled *Closed Trip Inquiry Follow-Ups*.

The screenshot shows the 'Activity Query Level 2' dialog box with the following settings: 'Reminders' is checked, 'Completed/Responded' is selected in the dropdown, 'Notes' is unchecked, 'Activity Date' has 'From' blank and 'To' blank, 'Duration' is blank, 'Login Name' is blank, 'Priority' is blank, 'Reminder Type' is blank, 'Create Date' is blank, and 'Subject' is set to 'Trip Inquiry Follow-Up'. The 'Completed/Responded Date' section has 'To' set to '='. The 'OK', 'Cancel', and 'Reset' buttons are visible at the bottom.

# ClientBase Packet Four: Getting Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Reminder & Res Card Class Outline

## GOAL:

Teach agents how to create and use Reminders & Res Cards.

## What to do next?

See Monitor Results.



## Class Outline

After setup, you are ready to hold a staff meeting. Photocopy, distribute *Agent Handouts*, and teach Getting Started with Reminders & Res Cards skills:

### In-House Trainer Intro: How do Res Card Reminders benefit agents? (2 minutes)

- Helps me organize my daily routine.
- Helps me manage the sales process: I'll get alerted when it's time to follow-up on that sales inquiry.
- Helps my agency determine how many new trips are inquired about on a daily, weekly, monthly basis, and how many of these trip inquiries turn into actual bookings.
- All details about a particular trip are kept in one place.

### In-House Trainer Demonstration: How to create Reminders in conjunction with Res Card. With every trip inquiry (non-ARC), an agent creates a basic Res Card. What is a Res Card? (5 -8 minutes)

- Search for Profile
- Update/Create Profile if none exists
- Create Res Card
- Add Agent name if not defaulted
- Status "Active" defaults
- Select *Reservation Cycle* "Under Consideration"
- Give trip a name
- Identify region
- *Apply* to save Res Card and stay in

- In-House Trainer Demonstration** - How to create a Reminder in the Res Card Activity Tab for trip follow-up: **(6 minutes)**
  - Set a follow-up date
  - Explain dated and timed activity vs. to-do timeless
  - Review screen details
  - Select *Trip Inquiry Follow-up* as subject from drop-down menu
  - Use the alarm (optional)
  
- In-House Trainer Demonstration** - Show how to find all activities in the activity tab of customer profile. **(2 minutes)**
  
- In-House Trainer Demonstration** – How to click Global Folder you set up, *New Trip Inquiries*, click *Filter*, and how to input Agent's own name. Then demonstrate how to save this as a Personal Folder by using **File|Save Query As**. Each agent saves folder as *My New Trip Inquiry Follow-ups*. **(5 minutes)**
  
- In-House Trainer Demonstration** – How to work off a *To-Do* List daily. Either closing the *Reminder* by rescheduling it, or using the *Completed* field to take of list after it is refreshed. **(3 minutes)**
  
- Q & A Session (Cap at 5 minutes)**
  
- In-House Trainer Hands On:** Have agents practice new skills by doing exercises and role playing with another agent (see Agent Handouts). **(8 minutes or have them practice on own.)**
  
- In-House Trainer Sets Expectations:** Expectation is that with all new trip inquiries, agents will create a new Res Card a *Trip Inquiry Follow Up* Reminder. **(2 minutes)**

**I Needed Help.**  
**I was disorganized.**  
**I was overworked.**  
**I wasted too much time looking for**  
**files, phone numbers and information.**



**ClientBase Helped!**

**ClientBase**

Getting Started With  
Reminders & Res Cards

Agent Handouts

## Strengthen Client Relationships with Activity Manager



Tired of the paper nightmare taking over your desk? So many post-it notes you can hardly find your computer? Through the use of Reminders, Notes, and Mailers, *ClientBase* makes tracking communication with your clients a paperless process. Best of all, this information can be shared among agents and used to manage the marketing activities going on in your agency.



**Reminders** act as “ticklers” to keep you on top of important activities like brochure follow-ups, final payments, welcome home calls, birthdays and other marketing activities. Agents create Reminders to schedule future contacts and maintain daily to-do lists.



**Notes** allow Agents to easily document contact your customers have with your agency such as Client Comments, Client Inquiries, or Client Questions.



**Mailers** act like entries in a marketing “log.” They are a historical record created automatically whenever a label, document template, E-mail, or mail merge file is created for a client or group of clients.

***(Studies have shown agents' productivity and sales increase dramatically when using an activities management system like ClientBase. Better agent productivity is an important ingredient of a happy and successful agency.)***



### Example:

The agency’s most productive agent, Sharon, works from a daily Reminder and to-do list in *ClientBase*. From this area, she tracks and completes all of the customer marketing tasks that keep her valued clients loyal. *ClientBase* helps Sharon manage her schedule and “to-do” list so she is efficient at:

- Following-up and closing just about any travel lead that comes her way.
- Managing all of the tasks involved in planning a trip, including checking on payments, documents, waitlists, seating etc.
- Welcoming her customers home from their trips, as well as scheduling and managing on-going communications with her valued customers.

The way that Sharon begins her workday each morning tells you one of the reasons that she is a productive agent. The first thing she does when she signs into *ClientBase* is click on the *Activities* tab. By default, *ClientBase* queries the database for Sharon’s Open Reminders and the Results Screen immediately displays a list of the Reminders (or tasks) she needs to complete today. She likes to plan ahead and it is becoming more and more apparent why Sharon is the most productive agent. It has taken less than one minute for Sharon to review and organize her day with the help of *ClientBase*.

# ClientBase Packet Four: Getting Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Reminders & Res Cards Cheat Sheet

## GOAL:

To learn how to create Reminders & Res Cards.

## What to do next?

Practice, Practice, Practice!



## Cheat Sheet

Steps for successfully implementing basic Reminder & Res Card skills:

1. **When a customer inquires about a trip, query (search) for profile to update or create new profile, and click on Res Card icon on tool bar to create a new Res Card.**
  - *Agent Name* required
  - Status *Active* defaults
  - Select *Reservation Cycle*, "Under Consideration"
  - Give trip a name & identify *Region*
  - *Apply* to save Res Card
2. **Click the Activity Tab and Add to create Reminder for trip follow-up:**
  - Set a follow-up date
  - Select subject, *Trip Inquiry Follow-up*, from drop-down menu
  - Use the alarm (optional)
  - Click *Refresh* to see newly created Reminder
  - Save Res Card
3. **Every day open Activity Manager and your folder, *New Trip Inquiry Follow-ups* appear on your *To-Do List*.**
4. **Close a Reminder by either rescheduling it (if appropriate), or checking the *Completed* field. Click *Refresh* to take Reminder off your *To-Do List*.**

## Res Card with Activity Created, and suggested fields filled out:

ClientBase Plus - [ResCard]

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

Res Card Res Total Invoiced Total Balance  
No. 89 0.00 0.00 0.00

Generate Invoice Print Itinerary Print Trip Statement Batched Reminder

Create Date Agent Status Reservation Locks Source of Booking Group Branch No.  
10/15/2003 Sharon Meyer Active Under Consider [0] Travel W

Prepared for: Trip Name Locator No. Region Trip Start Date Trip End Date  
[181] Bean/Tam Alaskan Cruise Alaska

Addresses  
Client Ship to Address: Mrs. Tammy Bean, 389 Aviation Blvd, Redondo Beach, CA 90445  
Client Bill to Address: Mrs. Tammy Bean, 389 Aviation Blvd, Redondo Beach, CA 90445

Reservations Invoices Activities Agent Remarks Client Feedback about Trip Attachments More Fields

Type	Activity DateTime	SUBJECT	PRIORITY	Login/Created	
R	10/22/2003 10:00:00 AM	Trip Inquiry Follow-Up	Medium	SHARDN	Add Modify Delete Refresh Batched Reminder

ClientBase Plus - [Bean/Tammy]

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

Reminder

Mrs. Tammy Bean  
389 Aviation Blvd  
Redondo Beach, CA 90445  
Phone: +1 (213) 838-9021  
E-mail:

Date of Reminder: 10/22/2003  
Start Time: 10:00 AM  
Duration: 15 minutes

Profile: [181] Bean/Tammy  
Reservation: [89] Alaskan Cruise

Login Name: SHARDN  
Priority: Medium  
Reminder Type: Trip Inquiry Follow-Up  
Create Date: 10/15/2003

Set Alarm 5 minutes prior to scheduled time of Reminder

Login Name=SHARDN Database=C:\gdb\Newtrain.gdb 551.616 KB 10/15/2003 6:20:20 AM 0 Alarms

## Click New Trip Followup Folder to see Reminders:

ClientBase Plus

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

Activity Manager

Profile Remind Note Mailer Rescard Inventory Print Label Letter PNR E-mail Glance Go To Delete

Res Cards Inventory Internet  
Profiles Activities

Activity Manager

- Global
  - Notes
  - Reminders
  - New Trip Inquiry Followups
  - Closed Trip Inquiry Followups
  - Mailers
  - All Activities created last month
- Personal
  - My New Trip Inquiry Followups

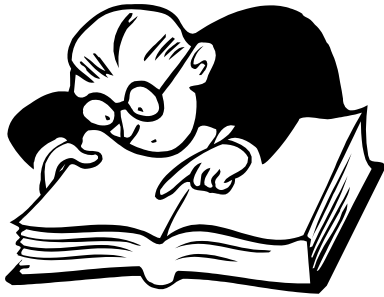
Level 1 Level 2

Filters  
Activities Reminders [] Login Name="SHARDN"

Activities

Type	Activity DateTime (ACTDATETIME)	Name (PROFILE)	Subject (ACTIVITY)
R	10/15/2003	Steigler/Charles	Trip Inquiry Follow-Up
R	10/15/2003	Chase/Herb	Trip Inquiry Follow-Up
R	10/15/2003	Rosen/Steve	Trip Inquiry Follow-Up
R	10/15/2003	Young/Patrick	Trip Inquiry Follow-Up
R	10/15/2003	Cantillon/John	Trip Inquiry Follow-Up
R	10/15/2003 11:00:00 AM	Kazamek/Tom	Trip Inquiry Follow-Up
R	10/15/2003 2:30:00 PM	Beverly/Daniel	Trip Inquiry Follow-Up
R	10/22/2003 10:00:00 AM	Bean/Tammy	Trip Inquiry Follow-Up

Login Name=SHARDN Database=C:\gdb\Newtrain.gdb 547,980 KB 10/15/2003 6:41:38 AM 0 Alarms



## **Let's Practice!**

### **Exercise #1:**

Use your own Agent profile to create a new Res Card, fill in the suggested fields, and create a Reminder to follow-up next week. Set an alarm. Click on your saved folder in the Activity Manager, *My Trip Inquiry Follow-ups* to see this new Reminder.

### **Exercise #2:**

There's a new client on the phone interested in a Bermuda Cruise. Create a new Profile, a new Res Card, fill in the suggested fields, and create a Reminder to follow-up next week. Set an alarm. Click on your saved folder in the Activity Manager, *My Trip Inquiry Follow-ups* to see this new Reminder. Then Delete the profile.

### **Exercise #3: Role Play**

Partner up with another agent in your office and practice how to create a new Res Card with Reminder by using an Agent profile. (Don't forget to ask client if this is correct address, phone number and e-mail.)

Reverse roles.

# ClientBase Packet Four: Getting Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Monitor Reminder & Res Card Results

## GOAL:

Use reports to monitor agents' progress.

## What to do next?

See *Additional Resources*.



## Monitor Results (Inspect What You Expect!)

After you have taught agents basic creation and use of Reminders and Res Cards, use reports to monitor their progress to review and discuss results as soon as possible:

- From the **Activity Manager** click the **New Trip Inquiry Follow-ups** folder. Go into the filter, do not reset and put in any dates you desire in the **Activity Date** to run a report (last 2 days, last week, etc.)
- Run **Agent Statistics Report** to check agents' progress (see sample on back):
  - Go to **Reports|Activity Manager|Statistics|User Stat** to run report showing per agent what New Trip Inquiries were created yesterday.
- Publish User Stats daily for all to view (for agent accountability).**
- Review skills with those agents who need help.**
- Randomly select an agent to sit with and observe usage.**
- After Agents have learned Packet 5, you can see how many Trip Inquiry Reminders turned into actual bookings.** Click the **Closed Trip Inquiry Follow-ups** folder. Jump into the Res Card from the Reminder, and see if the **Reservation Cycle** has been changed to **Booked**.



## Sample User Stats Report on Reminders Created Yesterday

ClientBase Plus - [Report]

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

Report: **User Statistics**  
Agent: SHARON  
Date/Time: 10/15/2003 8:05:56 AM  
Filter: \*\*\* Activities \_\_\_\_\_  
Reminders ()  
Login Name="SHARON"  
Subject="Trip Inquiry Follow-Up"

\*\*\* General Info \_\_\_\_\_  
Profile Status Is Equal to Active

SHARON	Query Results	Matches	% of Results
All Reminders	8	8	100.00%
Open Reminders	8	4	50.00%
Open Reminders with alarms	8	1	12.50%
Closed Reminders	8	4	50.00%

Page 1 of 1

Login Name=SHARON Database=C:\gdb\Newtrain.gdb 536,608 KB 10/15/2003 8:06:04 AM 0 Alarms

# ClientBase Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Reminder & Res Card Additional Resources

## GOAL:

*Provide additional resources for you to teach Reminders & Res Cards.*

## What to do next?

*See Skills Enhancement.*

## Additional Resources

Here is a list of additional resources available from TRAMS, Inc. to help you and your agents learn basic profile skills:

### □ For the In-House Trainer:

4. From ClientBase program:
  - a. In **Help Files|Contents**, click *An In-Depth Look at Activities*.
  - b. In **Help Files|Index**, type in *Reminders* and click on *Create Reminders* entry topic.
2. From **www.trams.com|Training**:
  - e. Attend live WebEx classes: *Using Activity Manager to Organize Your Day (including Communicating Regularly with VIP's)*
  - f. Listen to short recordings on *How to Create Res Card to Track New Customer Inquiries* in Res Card section on *CB Plus CBI Modules* link under Training section.

### □ For the Agents:

4. From ClientBase program, click **Help Files|Index**:
  - a. Type in *Reminders* and select, *Creating Reminders*.
2. From **www.trams.com|Training**:
  - g. Listen to short recordings on *How to Create Res Card to Track New Customer Inquiries* in section on *CB Plus CBI Modules* link under Training section.
  - h. Attend live WebEx classes: *Using Activity Manager to Organize Your Day (including Communicating Regularly with VIP's) and Using Res Cards, Reminders and Notes to Successfully Close Sales*.
  - i. Attend daily WebEx Q & A Sessions.

# Packet Five: Enhanced Res Cards Skills

ClientBase QuickStart  
Customized Turnkey Program

Res Card Skills Overview

## GOAL:

Teach agents how to enhance their Res Card skills.

## What to do next?

See Res Card Setup.



## Overview

Now that your agents have been introduced to the ClientBase Res Card to manage the sales process, it's time to expand the use of the Res Card for tracking the reservation details once a booking is made, and to use Batched Reminders to manage the trip planning process. In this fifth packet, **Enhanced Res Cards Skills**, you are teaching the agents to master the following skills:

- How to find Res Cards they have created**
  - Moving between Reminders and the Res Card
  - Retrieving Res Cards from the Client Profile
- Review General Info Section**
  - Auto-fill fields: Create Date, Agent, Status
  - How to change *Reservation Cycle* to *Booked*
  - Bill To and Ship To Addresses
- Key Additional Fields in Res Card**
  - Group
  - Regions
  - Passenger Name – Insert from Profile, and add other travelers
- How to Create New Reservation and input Vendor, trip pricing, and trip dates**
- How to use Batched Reminders**

# Packet Five: Enhanced Res Cards Skills

## GOAL:

Setup ClientBase before teaching agents Enhanced Res Cards Skills.

## What to do next?

See Class Outline.



## Setup

Before teaching agents enhanced Res Card skills, you need to setup ClientBase (see back for details):

- 1) Customize *Regions* by going to **Global Defaults|User Defined Fields|Res Card: Region of Trip**. Click *Add, Modify, or Delete* to change any of the regions that were defaulted in the system or add any of your own choosing. By completing this field you are able to track customer activity through Res Card queries and reports.
- 2) Customize *Reservation Cycle* by going to **Global Defaults|User Defined Fields|Source of Booking**. Click *Add, Modify, or Delete* to revise the defaulted Reservation Cycles or add desired ones. Track where customers are in the Res Card Cycle with queries and reports.
- 3) Customize *Source of Booking – Res Card* by going to **Global Defaults|User Defined Fields|Reservation Cycle**. Click *Add* any Source of Bookings that you want used to track using queries and reports where customers have heard about the trip entered into the Res Cards. No defaults exist.
- 4) Customize Batched Reminders by going to **Global Defaults|Batched Reminder Settings**. By default, Reminders have been setup using Current Date or Trip Start Date and +/- days. Delete Reminders you do not want to use, and modify the Reminders to reflect your agency's preferences. Create separate Reminders as well for different Travel Categories, if desired.



### Add/Modify/Delete **Res Card: Regions**

**Log In to ClientBase** with User Name set to *SYSDBA* and Password set to *masterkey*. Go to **Global Defaults|User Defined Fields|Res Card: Region of Trip**. Default regions have been set up for you. *Add, Modify, or Delete* any areas you want to track in queries/reports. **Note:** If user has permission to modify the Global Defaults, you need not log in as SYSDBA.



### Add/Modify/Delete **Res Card: Reservation Cycle**

**Log In to ClientBase** with User Name set to *SYSDBA* and Password set to *masterkey*. Go to **Global Defaults|User Defined Fields|Reservation Cycle**. Default Reservation cycles have been set up for you. *Add, Modify, or Delete* any Reservation cycle you want to track in queries/reports.



### Add/Modify/Delete **Res Card: Source of Booking**

Go to **Global Defaults|User Defined Fields|Source of Booking**. By default, no source of bookings have been added. *Add* any Source of Booking for Res Card trips you want to track in queries/reports.



### Modify **Batch Reminders**

Go to **Global Defaults|Batched Reminder Settings**. Click *Modify* to edit the default Reminders. From the drop-down menu, select *Optional* or *Always*. Upon launching a Batch of Reminders from a Res Card, a listing of default Reminders appears. An *Optional* entry prompts you to "check off" the Reminder before placing it into a res card; the *Always* entry is already "checked off" for you.

**Default Date Using:** From the drop-down menu, select *Current Date, ResCard Create Date, Trip Start Date, or Trip Return Date*. (These date entries are Merge fields used when launching the Batched Reminders from a Res Card. This defaulted date can be overwritten at the time of launching the Batched Reminders just before creating and saving them to the Res card Activities tab.)

**Plus/minus|Number of Days:** From the drop-down menu select the plus or minus sign and choose the number of days from 1 to 2000 to use in combination with the *Default Date Using* field. All the other fields are regular Reminder fields.

**Hint:** It is not suggested at this time you setup alarms with the Reminders. This can be done at a later date when agents are used to using alarms.

**GOAL:**

Teach agents additional Res Card skills .

What to do next?  
See Monitor Results.

**Class Outline**

After setup, you are ready to hold a staff meeting. Photocopy, pass out *Agent Handouts*, and teach Enhanced Res Cards Skills:

- In-House Trainer Review:** What is a Res Card and how does using Res Cards benefit agents? **(3 minutes)**
  - Manages sale from start to finish
  - Easily create Reminders all at once for all the things you need to track
  - Provides valuable trip details in one place
  - Management and owners can get valuable reports on trips
  - You can copy a Res Card from one Profile to another
  - Res Cards enable you to use Live Connect Providers
  - Saves time by typing details into Res Cards instead of writing them on paper and transferring them
  - Invoices from Res Cards fall directly into TRAMS Back Office
- In-House Trainer Demonstration:** How to retrieve previous created Res Cards. **(3 minutes)**
  - From inside a Reminder
  - From Profile's Res Card Tab
- In-House Trainer Demonstration: General Info Res Card Section (3 minutes)**
  - Change *Reservation Cycle* from *Under Consideration* to *Booked*.
  - Show how to *Go to Profile* and use *Windows* to hop back into Res Card
  - Explain *Bill to* and *Ship To* Addresses, Regions, Group
  - Add passengers – Insert from Profile, and add other travelers

- In-House Trainer Demonstration** – Create a new reservation and input vendor, trip pricing, and trip dates. **(3 minutes)**
  
- In-House Trainer Demonstration** - Click Batched Reminders to set up all reminders at one time for the trip. Show how to apply and check in Activity Tab for all reminders created. **(3 minutes)**
  
- Q & A Session (Cap at 8 minutes)**
  
- In-House Trainer Hands On:** Have agents practice new skills by creating new Res Cards (see Agent Handouts) **(8 minutes or practice on own)**
  
- In-House Trainer Sets Expectations (for Agent accountability):** Agents are to setup a res card for each new trip and create a reminder for *Trip Inquiry Follow-up*. When client books trip, agent will query up the res card, fill in key Res Card information such as passengers, vendor, trip pricing and dates, and created batched reminders for Deposit, Final Payment, Check for Documents, and Welcome Home call. **(3 minutes)**

**I Needed Help.**  
**I was disorganized.**  
**I was overworked.**  
**I wasted too much time looking for**  
**files, phone numbers and information.**



**ClientBase Helped!**

**ClientBase**

Enhanced Res Card Skills  
Agent Handouts



## Manage the Trip Planning Process with Res Cards



As your agency implements ClientBase and begins reaping the rewards of improved customer relationships and effective marketing programs, your leisure travel sales should start increasing. To help you better manage this increasing volume of business and track the leads generated by your marketing programs, the *Res Card* has been created. Think of the ClientBase Res Card as a home for the many details involved in planning each and every trip for your customers and as a tool that will help you manage the entire trip planning process.

Regardless of the technology your agents use or don't use, regardless of your niche or type of business, regardless of how long your agents have been in the business, there are certain fundamental components involved in the *trip planning process*. The ClientBase Res Card has been designed to help agents through each process with the objective of making agents more efficient and effective. In the past, agents may have concentrated more of their attention on just the Booking Process, but with the advent of airline commission caps, there has been a new emphasis on leisure bookings and a greater need to manage these leisure sales.

The Res Card feature in ClientBase provides a perfect tool to integrate all processes in trip planning. By setting up a Res Card, an agent can document the client's first call by creating a *Res Card* and scheduling a follow-up call (listed on the daily to-do list) with a *Reminder*. Once the customer is considering the trip, the agent can capture details of reservations and print out client quotes or itineraries. By using the Live Connect feature in ClientBase, agents have the ability to book reservations via on-line booking engines and then pull all that reservation detail back into the Res Card.

When the client books the trip, the agent can produce invoices and trip statements, while tracking invoiced and uninvoiced balances. Additional notes and reminders can be created to remind an agent of a final payment date or a document confirmation. When the customer returns home, the agent can document his remarks and suggestions. Because all client trip data is in one localized area, reports such as Final Payment, Vendor Booking and Service Provider Activity can be produced for Res Cards in all stages of implementation of the trip planning process.

As ClientBase shares a database with TRAMS Back Office, the invoices generated from the Res Card automatically become part of the invoices shared with TRAMS for Windows. Invoices generated through the Res Card maintain their own numbering system, separate from the numbering system of invoices generated through Interface.



## GOAL:

To enhance your res card skills.

## What to do next?

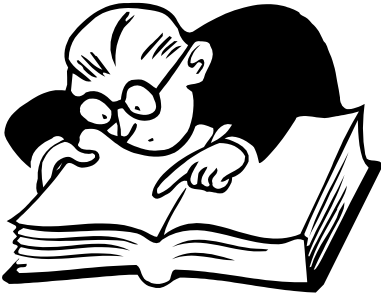
Practice, Practice, Practice!



## Cheat Sheet

Steps for successfully entering Res Card Information:

- 1. For every new trip inquiry, edit/create a new profile and then create a new Res Card and *Trip Inquiry Reminder* as learned in Packet 4.
- 2. When client books the trip and if a Res Card already exists for this customer, enter it either through the Reminder, or in the Profile Res Card tab. Fill in Key Fields in Res Card:
  - Res Card Cycle (change to *Booked*)
  - Group
  - Trip Name
  - Regions
  - Passenger Name – Insert from Profile, and add other travelers
- 3. Create new Reservation and input vendor, trip prices and trip dates.
- 4. Click Batched Reminders to automatically schedule deposit due, final payment, check documents, welcome home calls, etc.



## **Let's Practice!**

### **Exercise #1:**

Use your own Agent profile to create a new Res Card, fill in the key fields, enter passengers, and create a reservation with vendor, trip pricing, and trip dates. Click batched reminders to create all pertinent reminders at the same time. Apply changes and in the Activity Tab, click *Refresh* to see your new reminders.

### **Exercise #2:**

Use a real booking and enter basic data.

### **Exercise #3:**

There's a new client on the phone interested in a Bermuda Cruise. Create a new Profile and a *Trip Inquiry Follow-up* reminder. Now you are calling him from your To-Do list in the Activity Manager. Enter the Res Card from the Reminder, change the *Res Cycle*, fill in all other suggested fields, and create a reservation with trip dates, vendor and pricing. Click batched reminders to create all pertinent reminders at the same time. Apply changes, and in the Activity Tab, click *Refresh* to see your new reminders.

### **Exercise #4: Role Play**

Partner up with another agent in your office and practice creating a new Res Card in the partner's Agent profile. (Don't forget to ask client if this is correct address, phone number and e-mail.) Change the *Res Cycle* to *Booked*, and enter some passengers. Create a reservation with vendor, pricing, and trip dates. Click batched reminders to create all pertinent reminders at the same time. Apply changes, and in the Activity Tab, click *Refresh* to see your new reminders.

Reverse roles.

**GOAL:**

Use reports to monitor progress.

**What to do next?**

See *Additional Resources*.

**Monitor Skills (Inspect what you Expect!)**

After you have taught agents Res Card skills, use reports to monitor their progress to review and discuss results as soon as possible:

- In Level 1 Res Card Query, choose *Reservation Cycle* from drop-down menu, and select *Booked*. Check Res Card fields for accuracy.**
  - Were Passengers entered? Other fields you taught?
  - Were vendor, trip pricing, and trip dates complete?
  - Were Batched Reminders set up?
- Query for all Active Res Cards:**
  - Using Level 1 Query choose *Status* from drop down menu and choose *Active*, and choose *Agent Name* and leave blank.
  - Go to **Reports|Res Card Reports|Reservation Cycle Report** and sort by Agent to run report showing what res card cycle per Agent each Res Card is in (see back).
- Publish User Stats daily for all to view (for agent accountability).**
- Review Res Card skills with those agents who need help.**
- Randomly select an agent to sit with and observe usage.**



**Sample Reservation Cycle Report Sorted by Agent  
on Active Res Cards**

ClientBase Plus - [Report]					
File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help					
Agent Create Date Region Trip Name Client Name					
	Reservation Total	Commission Total	Invoiced Total	Uninvoiced Total	
Sharon Meyer	Oct 20, 2003	2,246.95	210.44	0.00	Sharp/Janet
<b>Totals:</b>		2,246.95	210.44	0.00	2,246.
<b>Booked</b>					
Agent	Create Date	Region	Trip Name	Client Name	
	Reservation Total	Commission Total	Invoiced Total	Uninvoiced Total	
Sharon Meyer	Sep 15, 2003	Alaska	Alaskan Vacation	Blue/Michael	
	1,134.00	113.40	0.00	1,134.	
Sharon Meyer	Oct 01, 2003	Mexico	Cabo San Lucas	Kazamek/Tom	
	4,467.90	475.10	500.00	3,967.	
<b>Totals:</b>		5,601.90	588.50	500.00	5,101.
<b>Paid in Full</b>					
Agent	Create Date	Region	Trip Name	Client Name	
	Reservation Total	Commission Total	Invoiced Total	Uninvoiced Total	
Sharon Meyer	Oct 03, 2003	United States	Las Vegas	Bloem/Connie	
	533.37	55.63	533.37	0.	
Sharon Meyer	Sep 30, 2003	Caribbean	Ocho Rios	Able/Ken	
	4,037.50	387.00	4,037.50	0.	
Page 1 of 2					
Login Name=SHARON Database=C:\gdb\Newtrain.gdb 508,132 KB 10/29/2003 2:29:36 PM 0 Alarms					

**GOAL:**

To provide In-House Trainer and Agents with additional resources.

**What to do next?**

See Res Card Skills Enhancement.

## Additional Resources

Here is a list of additional resources available from TRAMS, Inc. to help you and your agents learn Enhanced Res Cards Skills skills:

**□ For the In-House Trainer:**

5. From ClientBase program:
  - a. In **Help Files|Contents**, click *An In-Depth Look at Res Cards*.
  - b. In **Help Files|Contents**, click *Setting Up ClientBase for your Agents*, to look at Batched Reminders section.
  - c. In **Help Files|Index**, type in *Res Card* and click on *Introduction*. Type in *Batched Reminders*.
2. From **www.trams.com|Training**:
  - g. Attend live WebEx classes: *Setting Up to Use Invoices, Itineraries, Trip Statements & Res Cards and Customize Agency Global Default Settings*
  - h. Listen to short recordings on *Res Cards on CB Plus CBI Modules* link under Training link.

**□ For the Agents:**

5. In **Help Files|Contents**, click *An In-Depth Look at Res Cards*.
  - a. In **Help Files|Index**, type in *Res Card* and click on *Introduction*.
2. From **www.trams.com|Training**:
  - a. Attend live WebEx classes: *Using Res Cards to Manage Reservation Data (Part 1)*.
  - b. Listen to short recordings on *Res Cards on CB Plus CBI Modules* link under Training link.
  - c. Attend daily WebEx Q & A Sessions.

## GOAL:

*To teach agents additional Res Card skills.*

## What to do next?

*Attend additional WebEx classes on advanced topics.*

## Skills Enhancement

As agents become more comfortable in entering Res Card information, you may want to teach them additional skills:

- What are Service Providers? Differences between Service Providers and Vendors.**
  
- Capture Reservation Details by inputting by hand, using Live Connect, using PNR Import, or using Inventory.**
  
- How to use Client Quote Itineraries.**
  
- How to generate an Invoice.**
  
- Using Live Connect.**
  
- Using Itemized Pricing.**
  
- Use of Remarks.**

# ClientBase Packet Four: Getting Started with Reminders & Res Cards

ClientBase QuickStart  
Customized Turnkey Program

Reminders & Res Cards Skills Enhancements

## GOAL:

*To teach agents additional Reminder & Res Card Skills.*

## What to do next?

*Start preparing Getting Started with Res Cards.*

## Skill Enhancements

As agents become more comfortable in basic creating and using Reminders, you may want to teach them additional skills:

- How to create Notes**
  
- Other Reminder uses**
  
- How to add other types of Reminders**
  
- How to use At-A-Glance**