

TRAMS

a Sabre leisure solution

ClientBase

Overview for Database Administrators

October, 2010



compatible | complete | supported | affordable

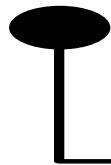


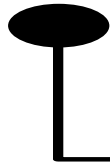
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Welcome to ClientBase



This ClientBase Overview is designed to provide the database administrator with an easy, quick reference to setting up some of the most commonly used features in ClientBase. This is not the ClientBase Manual. The ClientBase manual, which has been designed to provide detailed instruction for the database administrator, the front-line agents, and the agency management and marketing teams, is accessible from every ClientBase workstation via electronic help files that are updated automatically with every ClientBase release.

You may want to print out the section, entitled *Setting Up ClientBase for Your Agency*, located in the electronic manual located inside the ClientBase help files tab, *CONTENTS*. The latest ClientBase manual is also available for viewing using the Adobe Acrobat Reader from our Trams Products and Services website at www.Trams.com by selecting **Products|ClientBase|Documentation**.

In addition to our technical documentation, we offer Recorded Trainings that provides interactive training with the convenience of working on your own computer at your own pace. These are located on our website under **Training|ClientBase|Recorded Trainings**.

We also offer a series of On-Line Training Courses (on our WebEx link at www.Trams.com) which breaks the program down into digestible bites and provides one-hour live instruction within a small group. There are courses available just for the Database Administrator (the setup and maintenance person in the Agency). On-line daily Question and Answer sessions are available for interactive question/answer forums with ClientBase support personnel and other ClientBase users.

We further offer unlimited technical support by calling our team of highly trained support personnel at 310-641-8726 (provided you have signed up for this service), e-mailing a question to support@Trams.com, or faxing a question to 310-641-8571.

Let's face it, everyone learns in different ways and at different paces. Here at Trams, we provide you with a multitude of ways to learn ClientBase because the sooner you begin reaping the benefits of ClientBase, the sooner you'll be SELLING MORE TRAVEL. We're sure of it!

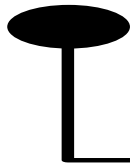
Here's a checklist for the order to set up your program for use (Implementation will be helping you with steps 1-7):

- ___ 1) Install Program.
- ___ 2) Import Profiles if needed.
- ___ 3) Set Up Branch info.
- ___ 4) Set Up Agent Profiles and link to branch.
- ___ 5) Set Up Group Security Level defaults.
- ___ 6) Set Up User Logins.

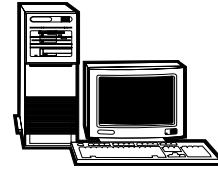
- ___ 7) Learn how to Backup/Restore.
- ___ 8) Globally Change Capitalization Using Case Converter and Set Up Case Converter.
- ___ 9) Set Up PNR Settings, Entries & Rules for Use with Merge to PNR.
- ___ 10) Set Up Unique Headers/Footers for Invoices/Doc Templates/Reports
- ___ 11) Set Up to Invoice, Send Trip Proposals/Itineraries and Trip Statements.
- ___ 12) Set Up Batch Reminders.
- ___ 13) Set Up Live Connect.
- ___ 14) Set Up Required Fields.
- ___ 15) Set Up Marketing Codes.
- ___ 16) Set Up Email with MAPI or SMTP.

Use these directions to maintain your database:

- 1) Profile Dupe Checker.
- 2) Global Modify.
- 3) Merge to File.
- 4) Download New Releases & Update Your Database.
- 5) Train and Motivate Front-line Agents on ClientBase.



Install ClientBase & Import Profiles from Other Sources



Installation:

To help you set up ClientBase, an Installation Guide has been included in the startup email that you received with your program. Please refer to this guide before you start installation. For help with installation, **e-mail implementation@Trams.com** if we don't call you first.

In the majority of cases, *ClientBase* is installed on the agency's network server and accessed by users from their workstations. Server requirements vary for each agency based on your networking needs and have been laid out for each agency before you have purchased the program.

In the past, it was common for one of the agent workstations to function as the *ClientBase* server. This type of networking is still available but is limited to smaller networks of five or fewer workstations. *ClientBase* is a client/server application which means the server does the processing rather than the workstations. There is a direct relationship between the number of workstations accessing *ClientBase* simultaneously and the degree to which the server's resources are taxed. The more workstations accessing the program, the more resources the server requires.

Printer Requirements

ClientBase utilizes Windows printer drivers and as such cannot be used with dot matrix printers. If you are purchasing a new printer, best recommendation is getting a Laserjet rather than a Deskjet printer.

Import Profiles from Other Sources:

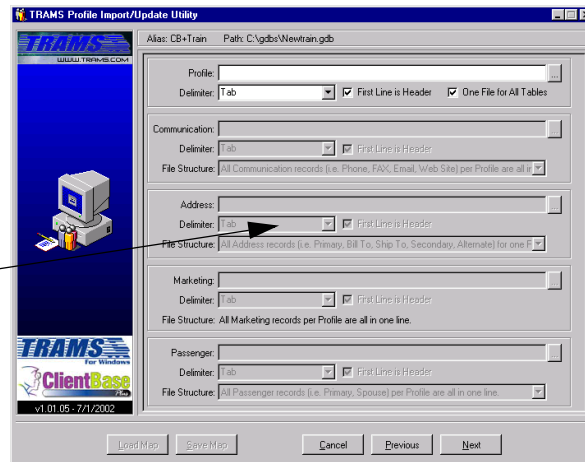
If you have Trams Back Office, when you installed ClientBase, you linked to the Trams database and you already have profiles in the database. But if you don't have Trams Back Office or want to import other names/addresses, emails, etc., you can use the Trams Import utility.

Regardless of the specific program used to maintain your existing database, if the program can create an ASCII comma or tab delimited file (and most programs currently can), that file can be imported using the ClientBase Import/Update Utility. An ASCII format uses a standardized coding scheme enabling different computer programs to exchange information in the form of a .txt file. Each record in the file includes information such as Name, Address 1, Address 2, City, etc. To recognize when one field ends and another field begins, a *delimiter* is used, separating each field.



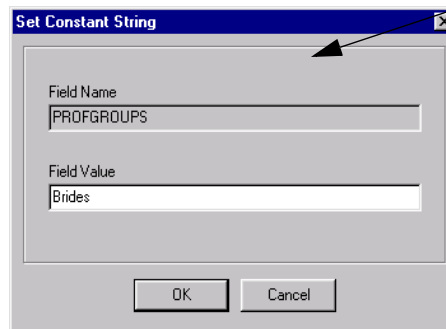
Example: *Travel with the Stars* recently purchased a mailing list for brides-to-be for honeymoon marketing. Marge, the manager, imports the list into ClientBase using the Import routine and marks each profile with a group name, "Brides" (which she set up prior to doing the import), so she can query the group up later to send out a blast E-mail.

- Alias Utility
- CB+ Database Update
- CB+Manual
- CB+Overview
- CBPlus
- CBPlus Help
- TRAMS Backup Restore
- TRAMS Profile Import**



Marge goes to the Import Wizard to map all columns from her purchased .txt file to ClientBase fields.

When she gets to the Profile Groups screen, she sets a group constant of "Brides," which she can use to query her new profiles later.



Quick Steps to Import Profiles from Other Sources

STEP ONE: Create an ASCII (.txt) file for Importing.

From your existing database program create an ASCII (.txt) file, saving it to a floppy disk or to a drive accessible to a workstation that can run ClientBase.

STEP TWO: Backup ClientBase.

Make sure you have a current backup of the ClientBase before starting the import.

STEP THREE: Start the ClientBase Import Wizard and Map Fields.

Access the Import Wizard by going to **Start|Program Files|Trams|Trams Import**. The Wizard guides you through importing different classifications of profile data: address, communication, marketing and passenger. The basic steps to running the import are:

- 1) Connect to your Database
- 2) Select Import File
- 3) Import Data to Miscellaneous Profile Fields
- 4) Import Data to Communications Fields
- 5) Import Data to Address Fields
- 6) Import Data to Marketing Fields
- 7) Import Data to Profile Groups
- 8) Import Data to Passengers Fields

- 9) Import Data to Profiles Remarks
- 10) Import Data to Special Dates
- 11) Import Data to Profile Remarks
- 12) View Profile Import/Update Summary Screen

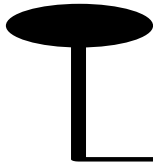
Notice three buttons listed on many of the screen in the Import Utility that are used to describe how that data should be imported:

Map	Mapping is used when a data field exists and is populated in the file you are importing. You want to bring the data in “as is” to a field in the database. You select the name of the field that exists in the source file and you tell the Import Wizard which field you want the data to show in ClientBase or Trams Back Office.
Constant	Use this feature when you want a field to be the same value for every profile being imported. Going back to the mail list example, you are importing data that is all leisure profiles. Set the Profile Type field as a constant with a value of Leisure. Now all the profiles imported from the mail list show as Leisure profiles In ClientBase and Trams Back Office.
Rule	Creating a rule to import fields allows you to apply some logic to the field being imported. Create rules that if the data meets a certain criteria, then map to a certain field in the database, or set a constant for the field. Let’s say the mail list you have purchased has a field name Type and the value in the data source is either Home or Business. You have decided you want to make the profiles that are marked business as Corporate profiles in your database. You create a rule that says if type is equal to “Business” then set the Profile type field to Corporate when importing the profile into the database. Another rule would be set where if the type is equal to “Home,” then set the profile type to Leisure when importing.

STEP FOUR: Review Imported Profiles.

Review newly imported profile data and verify that all information was imported properly.

Need help with this? [Email implementation@Trams.com](mailto:implementation@Trams.com).



Control Agent Access with Built-In Security



Your database quickly becomes a valuable asset to your agency. The unique value of your database creates a need for security. *ClientBase* allows you to control the access to the database for every user. The “front door” of the program is locked; only an assigned log-in name and password allows entry to the database. Once inside, the pre-set security options for the user name and password allow the owner or administrator to control what tasks the agent can or cannot perform.



Example: Helen, your leisure manager, should have full access to the database, including the ability to read, write or delete information. The Advanced Security Level window allows you to grant permissions on all the different menu options and designate read/write/delete abilities. John, on the other hand, is a new agent and should just have the ability to view and use information but have no access to setup and maintenance features.

Every login needs to be associated with an Agent Profile that has been created and linked to a Branch Number. Helen would have Manager Authorization with Full Access Security Level, while John would have User Authorization with Agent Access Security Level. Security Levels should be set up first as they are the defaults.



Quick Steps to Set Up User Security

Log In to *ClientBase* with User Name set to *SYSDBA* and Password set to *what was sent you in your startup email*. 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 setup a *master* first by editing the *Group Security Level* (see below). Both the User Name and Password entries are cap sensitive. The only user login that provides access to the User List is the SYSDBA (System's Database Administrator) login.

When *ClientBase* is initially installed, this SYSDBA Login comes with the default password of *what was sent you in your startup email*. It is highly recommended that the agency administrator change the password from *default* to a password that only he/she will know, so others cannot modify the system. Only the SYSDBA user can update the security database to add, modify or delete users or groups of user's configurations.

Our suggestion is first set up Group Security Levels which enable you to set up a default security level and link user logins to it. If you change your permissions and go into this area to make a change, any user login associated with the security level automatically gets updated.

STEP ONE: Go to Utilities|User Logins|Group Security Level, click on *Add* and give the group a name, such as *Agents, Outside Agents or Agent Supervisors, etc.*

STEP TWO: Complete each of the 7 tabs to establish the default permissions for this particular security level (see below).

STEP THREE: Next, go to Utilities|User List. Click on *Add*. Complete the fields for *User Name, Password and Profile*. On the pull-down menu for Security Level, select the name of the Group for which you have pre-set the default permissions. **Note:** Selecting a security level group will simply default 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. The permissions established for a Group Security Level can be modified at any time and *will* retroactively modify the permissions for any User Login pointing to that Group Security Level created to date.

STEP FIVE: From the Main Menu select Utilities, then User Logins, then User List. If no choices appear under User Logins, then you are not logged in as SYSDBA.

STEP SIX: Add, Modify and Delete User Logins.

From the *User Account Administration Box*, you can *Add, Modify or Delete* a user login.

Add: Click on the *Add* button to add a new user. The *User Setting* dialog box is displayed. Enter the name of the new user (up to 31 characters). Add a password. Verify the password. If the user is a selling agent, then select the agent profile from the pull-down menu. If the agent profile does not appear in the pull-down list, then click on the down arrow next to "Profile" on the tool bar and create an Agent profile.

Modify: Use the Modify button to change the settings of an existing user login.

Delete: Remove a user from the login list. (Note: You cannot delete a user profile if it is pointing toward an entry. If this is the case, check the *Disable* box to deny access. See Step 6 below).

STEP SEVEN: Select Security Level.

From the pull-down menu, you can select an option with pre-set database permissions (SEE SECURITY LEVEL SECTION ABOVE) or choose the *Advanced* tab to set the database permissions for this user yourself.

STEP EIGHT: Advanced Security Level.

Profile|Activity|ResCard Rights: Select from a drop-down list of choices to determine this agent's ability to Read, Write and Delete Profile, Activity, and Res Card records captured in your database. Read Only allows the agent to view the record only. Read/Write allows the agent to view and modify the record, but not delete the record. Read/Write/Delete allows the agent to view, modify and permanently remove the record.

Menu Options: Allows the SYSDBA to further restrict permissions to selected menu items within the database. For example, you may not want to grant a new user the ability to change the global default settings. In that case, you would uncheck the box next to Global Defaults. Now the user cannot access the Global Default menu option. If you want to give an agent access to all global default settings except Marketing Codes, then the Global Defaults box would remain checked but the Marketing Codes box would be left unchecked. Every menu option available in ClientBase is listed here for you to enable or disable for each agent.

Profile Tabs: Each profile type is made up of several folders, or tabs of information. To provide you with the utmost flexibility, each tab for each type of profile can either be enabled or disabled for each User. Click on the down arrow and remove the check from any tab of information you do not want this agent to view.

Other Restrictions: By placing a check in front of any of these items, a user is prevented from accessing that area of the database.

NOTES:



Ensure the Integrity of Your Database With Backup/Restore



Saving your data files at the end of each day's work is absolutely vital! If you do not, you run the risk of losing data - one of your agency's most precious assets. Even though PC hardware has become more reliable, and ClientBase makes every effort to protect the integrity of the system against mechanical failures and user errors, no system is 100% failure-proof. Since ClientBase shares a database with Trams Back Office, when you backup ClientBase, you backup Trams Back Office as well!



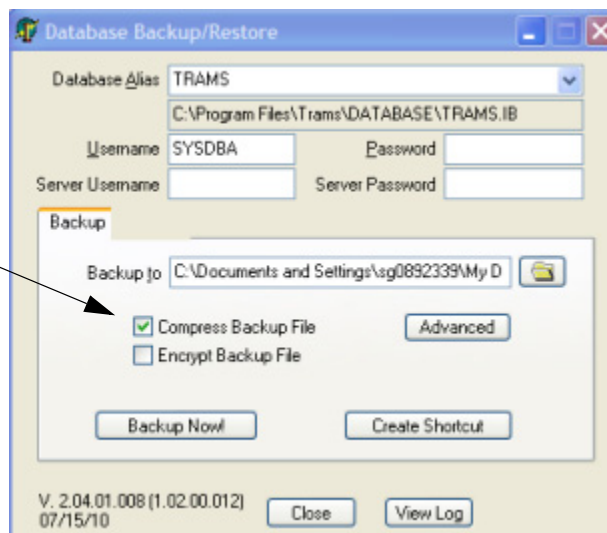
Example: Mary, the agency manager, takes a ClientBase backup every day on a flash drive. She can do this while others are using the program. She alternates flash drives (using one disk for Monday, Wednesday, and Friday; and one for Tuesday, Thursday, and Saturday). On Fridays, Mary makes an extra backup and takes it home. This way if anything happens to the agency backup, she has an extra backup. (She could also use a CD or back up to another computer on the network, alternating location each day.)

In the event there is a power surge or your hard disks crashes, you may need to restore your backup data. **Since the ClientBase and Trams Back Office share the database structure, we want to remind you that you cannot backup or restore the data for just ClientBase or just Trams Back Office.**



For example, Mary experienced a power surge that prevents her from connecting to the database. It is Thursday, and she forgot to make a backup on Wednesday. She has the backup from Tuesday and wants to restore ClientBase data. If she does this, she loses all invoices, payments, etc. that were interfaced or entered into Trams Back Office on Wednesday.

Mary goes to **Start|Programs|Trams|Trams Backup/Restore** to access the backup utility. Other users do not have to be out of the program.



Mary backs up every day. On Fridays, she makes an extra backup and takes it home. When she is backing up ClientBase, she is also backing up Trams Back Office. Likewise, if she needs to restore, she realizes she is restoring both programs' data.



Quick Steps to Backup

STEP ONE: Go to Start|Programs|Trams|Backup/Restore.

Other users do not have to be out of the program. When you backup ClientBase, you also backup Trams Back Office!

STEP TWO: Setup the Backup Utility.

From the Backup tab, select the *Alias* of the backup database. The Database Path listed below the alias is where your data currently resides. Backup To shows the drive, directory, and name of the backup file you are creating. *Backup To* files can be set to another computer on network, a CD or flash drive.

STEP THREE: Run Backup.

To begin the backup, click on *Backup Now*. You receive a message, "Database Backup in Progress" indicating that a backup file is being created. ClientBase automatically checks your files to make sure the data is in good shape. Note that this check commences any time the backup is invoked and only modified files are checked for errors.

STEP FOUR: Setup Backup with a Desktop Icon

To retain these settings each time you want to do a backup, click *Create Shortcut*. This creates a shortcut on your desktop that you can double click on each time you want to do backup.



Quick Steps to Restore

STEP ONE: Go to Start|Programs|Trams|Backup/Restore.

In the event there is a power surge or your hard disks crashes, you may need to restore your backup data. Select the *Restore Tab*. The Restore function lets you recover backup data saved on disks using the Trams Backup function. Restore replaces your current data files with those on your backup diskette(s). This restore program restores **both** Trams Back Office and ClientBase data. Since the two programs share a common database, you cannot restore one without the other.

IMPORTANT: Everyone must be out of ClientBase and Trams Back Office when restored in performed.

STEP THREE: Setup Restore.

Choose the correct Database Alias; type the Password for SYSDBA; choose the location of the file to be restored (the default is a:); and finally click on the Restore Now! button to begin the restore process.



Quick Steps to Setting Up Scheduled Backup

STEP ONE: Go to Start|Programs|Backup/Restore, enter settings, and create shortcut.

Under the Profile Tab, enter settings as outlined above. Setup Click Create Shortcut.

STEP TWO: Edit Target Line by right mouse clicking the short cut you have just created on your desktop.

Left Click Properties and place your cursor at the end of the target. Add "space" -auto (Press space bar; do not type the word space and then type -auto). Highlight Target line & press <CTRL> C to copy, and Click OK.

STEP THREE: Schedule the Backup by click on Start|Programs|Accessories|System Tools|Schedule Task.

Click Add Schedule Task. Follow the Wizard by clicking Next, and then Browse. Change Look in to "Desktop", and Select Backup Trams, and click Open, and Next.

STEP FOUR: Select how often you want the backup to run.

Selecting Start Time, When task is performed and Start Day.

STEP FIVE: Enter the login for your Computer

Make sure your password is correct and leave blank if there is no password. Be sure to check in the box next to Open Advanced Properties for this task when you click Finish.

STEP SIX: Click in the Run box, and press <CTRL> V to paste the target line from the short cut in the box.

Click OK.

STEP SEVEN: You're ready to do a scheduled backup.

Make sure your backup disk is in the drive, and make sure your computer is on when the backup is scheduled.



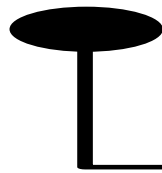
Quick Steps to Testing Your Backup (!)

It is a good idea to periodically backup your Trams database using the Trams Backup/Restore utility, and restore it to a different alias to clean up any index issues in the database. The indexes over time can cause slowness in the performance. The restore cleans the indexes by regenerating them. This process checks the integrity of your database. **Never restore Trams.ib until you have restored the backup someplace else. If you have any difficulties whatsoever, immediately call support at 310-641-8726!**

STEP ONE: Go to Start|Programs|Trams|Alias Utility. Create an alias named Backup and type: C:\Program Files\Trams\Database\backup.gdb. Do not test as there is no database until the restore has been completed.

STEP TWO: Restore the last backup to the Backup Alias (it creates the new backup.gdb when it does this).

STEP THREE: Log into ClientBase as this Alias, Backup, and make sure all was restored correctly. If you can look at the details of one profile, the backup is healthy.



Globally Change Capitalization Using Case Converter

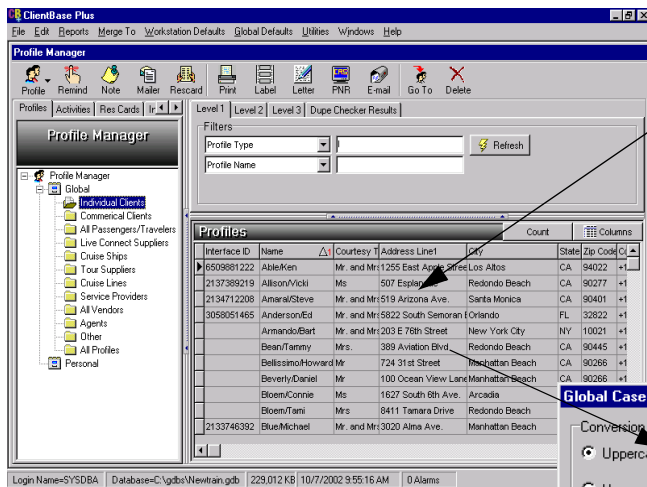


You know how your agents like to enter data using solid capital letters or no capital letters. It makes data entry faster for them. But unfortunately, if you want to use these same entries to merge to a letter, invoice or an email template, they won't be formatted properly. The Case Converter takes the results of a current query and automatically converts the case for selected fields. It changes the first letter of each word as a capital and the remaining letters to lower case.

After you have performed a Case Converter, you can set up ClientBase to automatically change the cases while agents are typing in ClientBase profiles.

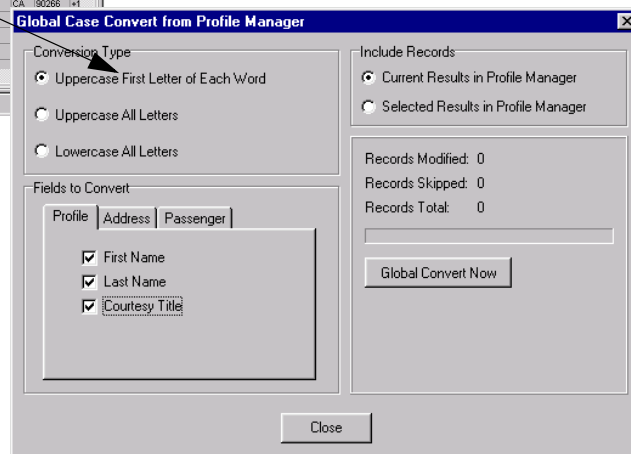


Example: Cruise Travel which had been using TBO for many years, just installed ClientBase. Many of the profiles in the database were created with solid capital letters. Tom, the agency manager, queries up all profiles in the database and sets up the Case Converter. He specifies what fields he wants converted, and when he finishes, the first letter of each word is capitalized and the remaining letters are set to lower case.



Tom queries up the profiles on which he wants to perform a case converter. Next, he goes to Utilities\Case Converter..

Tom selects the Conversion Type, the Fields To Convert, and presses *Global Convert Now*.





Quick Steps to Use Case Converter

STEP ONE: Query up the profiles you want to case convert.

Use the Profile Manager to query the profiles you would like to run the case converter on before running this utility.

STEP TWO: Click on Utilities|Case Convert to access the utility.

Make your selections:

Conversion Type: This determines how you would like the case converter utility to change the case of the selected fields. Select either Upper Case First Letter of Each Word, Upper Case all Letters, or Lower Case all Letters.

Fields to Convert: Place a check into each field you would like the system to convert, including Profile, Address and Passenger fields.

Include Records: Allows you to determine what profiles should be converted. Select either Current Results or Select Results. (You must query up the profiles you would like case converted before running this utility.)

STEP THREE: Click *Global Convert Now* to run the case conversion utility.

Records Modified displays the number of records affected by the conversion.

STEP FOUR: Once you have performed the *Global Case Converter*, follow these directions if you want your agents to be able to type in solid caps or not caps when creating a new profile, but have it automatically convert the case.

STEP FIVE: Go to Global Defaults|Profile Defaults|Auto-Case Converter Settings|Profile Tab.

By placing a check into *First Name*, *Last Name*, or *Courtesy Title*, as you are working within your ClientBase profiles, the first letter of each word entered will be automatically capitalized and the remaining letters will be automatically set to lower case.

STEP SIX: Click the Address Tab.

By placing a check into *Address Line 1*, *Address Line 2*, *Apt/Suite*, *City*, or *Country*, as you are working within your ClientBase profiles, the first letter of each word entered will be automatically capitalized and the remaining letters will be automatically set to lower case.

STEP SEVEN: Click the Passenger Tab.

By placing a check into *First Name*, *Last Name*, *Courtesy Title*, or *Relationship/Position*, as you are working within your ClientBase profiles, the first letter of each word entered will be automatically capitalized and the remaining letters will be automatically set to lower case.

Set Up PNR Settings, Entries, & Rules For Use With Merge to PNR



ClientBase provides your agents with the ability to move customer information (maintained in the ClientBase profile) to your reservation system's PNR. This feature works with Apollo, Sabre, Amadeus and Worldspan. In addition to your client profile fields, ClientBase includes four PNR entry tables--at the branch level, at the agent level, at the profile level and at the passenger level. This means you have complete flexibility on the amount of information you would like automatically formatted for a PNR while working in a ClientBase profile. But before agents can use this feature, you need to set up the PNR settings, PNR entry tables, and if you want to send data other than the default entries (Bill To Address, Ship To Address, Interface ID, Phone Numbers, Credit Cards, Frequent Flyer Numbers), you need to set up PNR Rules as well. 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.



Example: Manager, Jan Jones, wants agents to start using the Merge to PNR feature to grow her agency marketing database. She knows this is the best way to add new profiles and update existing ones with Address, Phone & Email information since customer info is sent to the PNR from ClientBase each time a client books a trip. Jan first sets up the PNR Settings and then creates new ClientBase rules for customer preferences.

Merge to PNR Settings

Reservation System:

General | Passenger Name Format

Special Keys:

Font
Name:
Size:

Email @ symbol:

Use API:

Send as one transmission

Order of Entries

- Branch PNR Entry Table
- Branch Rules
- Agent PNR Entry Table
- Agent Rules
- User Rules
- Primary Address Rules
- Bill To Address Rules
- Ship To Address Rules
- Secondary Address Rules
- Alternate Address Rules
- Phone Rules
- Fax Rules
- E-mail Rules
- Profile PNR Entry Table
- Passenger Name Rules
- Passenger Miscellaneous Rules
- Passenger PNR Entry Table
- Credit Card Rules
- Frequent Flyer Rules
- Hotel Program Rules
- Car Program Rules
- Profile Miscellaneous Rules



Quick Steps for Selecting PNR Settings

STEP ONE: Go to Global Defaults|Merge to PNR Defaults|Merge to PNR Settings.

Select the appropriate reservation system for your agency from the pull-down menu.

STEP TWO: Most of the appropriate settings have been defaulted. Just click OK to accept.

Special Note to MySabre Users: Agencies who are using MySabre need to take the following steps to implement the Sabre API in order for the Merge to PNR and PNR Import features to work. If MySabre agent booking portal is already installed, you can enable MySabre API by starting the Emulator, displaying the Configuration dialog from the Options menu of the Emulator, and choosing MySabre API. After placing a check in the setting MySabre API and clicking OK, a message informs you to log out and log in again to activate the MySabre API.

Special Note to Sabre Red Users: An API is the tool ClientBase uses to connect to the Sabre Host. In order for PNR Import (and Merge to PNR) to work, you must enable the MySabre API within Sabre Red. Select Tools|Options|Sabre System|Advanced and check MySabre API.

STEP THREE: Test Using Merge to PNR and adjust Rules Accordingly.

The first step in using the Merge to PNR feature is to locate the profile you want to merge with your GDS from the Profile Manager. When merging information into your GDS, you have several choices. Merge the information to PNR from the Query results screen by entering the profile folder. From within the profile, make sure you have entered accurate Address/Phone/Email/Passenger and any Card information and access the toolbar CRS/PNR icon to start the move to PNR. (The first time you do a Merge to PNR, change the Reservation System to yours. It'll save this next time you come in.) After you have clicked on the Merge to PNR icon in the toolbar, notice a series of check boxes in the PNR builder selection screen.

Select the information you want to move to a PNR. In the Passenger Entries column, these should appear in alphabetical order any passengers that were created for leisure clients. If you want to change the order in the PNR, however, simply use your mouse to drag the passenger into the desired position in the column. Check off any additional entries you want to move to the PNR and click Send. (By clicking Preview, you are taken into a PNR preview screen which you can edit.)

If after Merging to the PNR, you see any entries that do not look correct, tailor the PNR Rules.



Quick Steps for Tailoring PNR Rules

If you do a Merge to PNR and find that the data is not merging correctly, you can tailor the default PNR Rules:

STEP ONE: Go to Global Defaults|Merge to PNR Defaults|Merge to PNR Rules to Review the Default CRS Rules:

The contents of each rule is captured in the area called *PNR Custom Rule* and is made up of free flow text, Special Characters and Merge fields. Review each Rule and verify that the formats used in the defaults match the formats used within your Agency when building PNR's. To modify any text, simply type over it. To add an additional merge field, place your cursor where you would like it to land within the rule, then highlight the merge field in the *Available Fields* area and click *Insert*.

STEP TWO: Click *Add* to add an Additional Rule, and fill in the following fields:

Practically any information stored within a ClientBase profile can be formatted for your CRS and included when using the Merge to PNR feature. To include additional information, in addition to the six areas addressed in the

default rules, select the appropriate Reservation System and click on the Add button. Do the following to set up a new rule:

- 1. Description of Rule:** Enter a brief description of the type of information you will be including in this rule. This description appears on the PNR Selection Screen when using the Merge to PNR feature.
- 2. Field Groups:** Select the type of profile data you want to format for your CRS PNR's. Click the arrow located to the right of this field to select from a drop-down list of choices. Each field group includes a designated list of profile fields available for use within a PNR Rule. These profile fields appear in the *Available Fields* area when the Field Group is selected.
- 3. Always Move This Rule:** When checked, this field sets the rule to always move this entry into a PNR. When left unchecked, the entry is optional.
- 4. Display on Selection Screen:** The PNR Selection Screen is the screen that appears when you use the Merge to PNR feature and allows you to select the specific profile data to be included and sent to the PNR. It is advisable to review the results of each rule on the PNR Selection Screen
- 5. PNR Custom Rules:** Use the combination of free flow text, special characters, and merge fields from the list of available fields to create a Custom Rule.

Handling Blank Merge Fields

When setting up Rules in ClientBase, you may choose to include Merge Fields that aren't always completed in every profile. These fields include Courtesy Title, Apt/Suite, or Company Name. 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. Here's an example: The brackets around **[5/«CompanyName»§]** suggest that if this is an Leisure Profile so the Company Name Merge Field is blank, then don't include the 5/ or end item formatting either.

Need more help with this? Call support at 310-641-8726 or email interface@trams.com to ask your questions.



Quick Steps for Creating PNR Entries

ClientBase comes with PNR entry tables at the Branch, Agent, Profile and Passenger Level. These tables give you the opportunity to capture any PNR entries or remarks you would like included when sending data to a PNR.

STEP ONE: Go to Branch PNR Tab, Profile PNR Tab, Family Member/Employee PNR Tab, or Agent PNR Tab.

In order to capture profile, passenger or agent-related PNR entries (such as general remarks, special meal requests, air/car/hotel preference, UDID's, department, etc.), a tab is included at the profile level and at the family member/employee level. Use the Add, Modify, and Delete buttons to maintain specific PNR entries for each passenger. There are no limits to the number of PNR entries captured in this table.

STEP TWO: Click *Add* and fill in the following fields:

CRS: Choose your CRS system from the drop-down menu.

Description of Entry: Enter a free-flow "Description" field.

Always Move this Entry: By checking this box, the entry always moves when you do a move to CRS. If this box is not checked, you'll have a choice of moving the entry whenever you want.

Assign Name Field Position: When checked, automatically attaches the passenger's name position at the end of the PNR entry (e.g. 3SSRVGML-1.2).

Display on Selection Screen: When checked, automatically displays this entry on the selection screen when using the Merge to PNR feature.

PNR Entry: Enter the PNR entry the way you would in your reservation system. Click *OK* to save.

NOTES:



Set Up Headers/Footers for Invoices, Document Templates and Reports

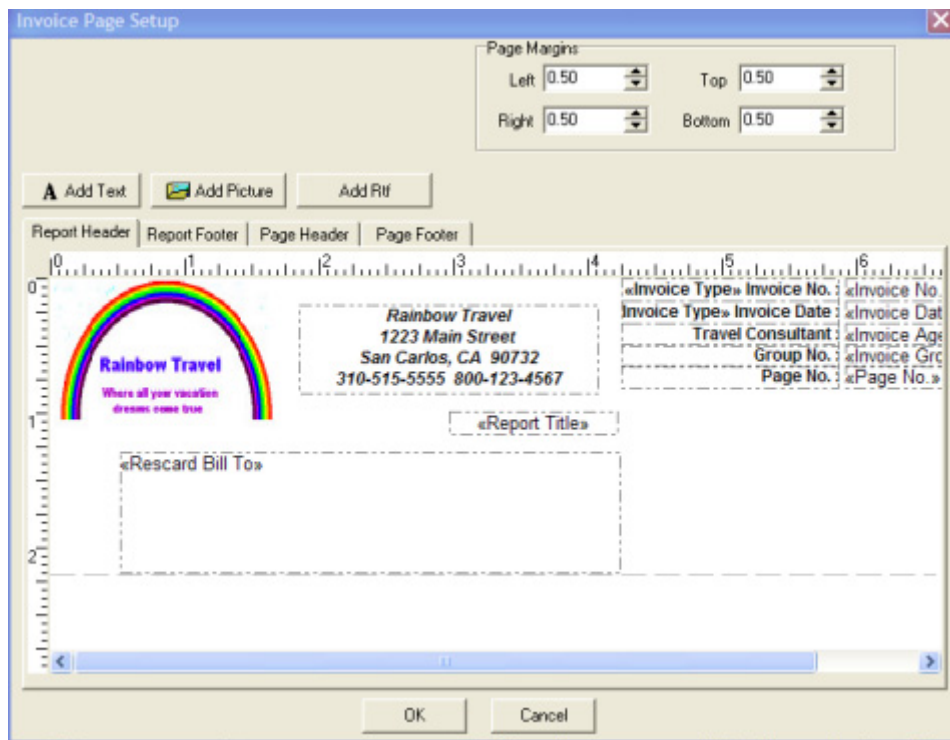


Agencies want to send invoices, documents, and reports with their own customized headers and footers that include company logo, address and company motto. Setting up the Header/Footer under Global Defaults creates a global header/footer.



Example: Rainbow Travel wants to set up its own logo, address and company motto in headers for use with Invoices, Document Templates, and Reports. The ClientBase database administrator goes to Global Defaults|General Setup|Headers/Footers|Invoices and sets up global headers and footers which can be used when invoicing. When he is done, he repeats the process for Document Templates, Reports and any other document he needs a header/

footer on.





Quick Steps to Set Up Headers/Footers for Invoices, Doc Templates & Reports

Because branch merge fields are available, agencies with multiple branches may either setup headers/footers globally or at the branch level under **Utilities|Branch|Invoice Page Setup**. When running an invoice the system looks at the branch settings first, and if nothing is in there, prints out the global default header/footer.

STEP ONE: Go to **Global Defaults|General Setup|Headers and Footers|Invoices**.

Select either the Report Header, Report Footer, Page Header or Page Footer tab. The report header is the header on the first page of the report, the report footer is the footer on the last page in the report. The page header is for each page of the report, and the page footer is for each page of the report. If you have a Report Header/Footer and Page Header/Footer all setup, each prints on each of the pages you designate.

On All Pages: Appears on all pages regardless of the number of pages. If *Report Headers/Footers* exist, the *Page Header* appears just below the *Report Header*, and the *Page Footer* appears just above the *Report Footer*.

On First Page Only: Appears on just the first page, or if a single page document appears on that single page. If *Report Headers/Footers* exist, the *Page Header* appears just below the *Report Header* and the *Page Footer* appears just above the *Report Footer* on Page 1.

Skip First Page: Appears only starting with Page 2 of the document. If it's a single page document then it does not appear.

STEP TWO: Add Text or RTF.

Add Text: Use *Add Text* to insert text into the header or footer. A text box appears in the upper left corner. To type and format text, double-click the text box. A screen appears to enter your desired text, align the text, and set the font. Click *OK* to go back to the main screen. Highlight the text box to click and drag the text box and position it. Click and drag the text box to size it properly.

When you add an rtf box, you are able to do more text formatting. Notice the formatting toolbar for your use. You may also add merge fields.

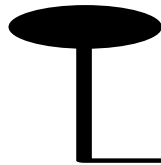
STEP THREE: Add Picture File.

Use *Add Picture File* to insert a graphic file. Use the browse feature to locate the graphic file on any drive/directory and click *Open* once located. (Use *.jpg, *.jpeg, *.bmp, *.ico, and *.emf type graphic files within headers and footers.) Double-click the graphic to access dialog box to set size and page alignment, or highlight the graphic to click and drag, size, and position it properly.

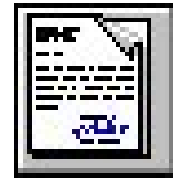
STEP FOUR: Save the Modifications and Continue to Set Up.

Now click on the *Footer Tab* and begin to set this up repeating Step Two and Three above. Save.

STEP FIVE: Next go to **Global Defaults|General Setup|Headers and Footers** to set up a unique header and/or footer for any other document.



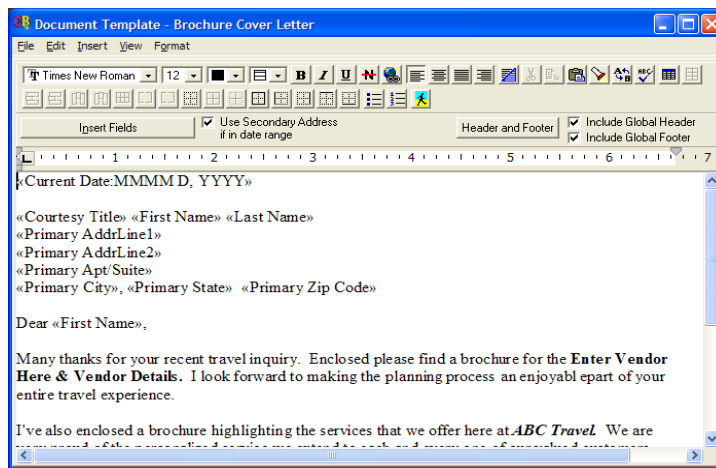
Set Up Document Templates & Label Settings for Agent Use



ClientBase includes the ability to produce and customize form letters or e-mails (Document Templates) or labels and then easily merge those letters or labels within a profile or from the results of a Profile Manager query. ClientBase comes with sample letters in the program that need to be customized for use. Unlimited document templates and email templates can be added as needed.



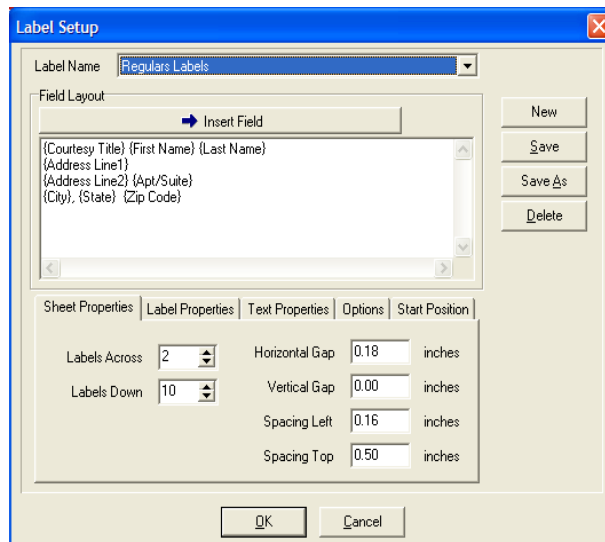
Example: Manager, Jan Jones, wants to customize the document templates that agents will be using to send correspondence to customers (such as a Passport Expiration letter, or a Brochure Cover Letter) or for use with blast e-mail.



Jan goes to **Global Defaults|General Setup|Document Templates** and then **File|Load** and one at a time either modifies or deletes out the defaulted docs that come with the program. She adds her own templates and creates email templates.



Example: Next, Jan create label defaults for agent use:



Jan goes to **Global Defaults|General Setup|Labels** to select the correct labels to use with ClientBase mailings.



Quick Steps to Set Up Document Templates

STEP ONE: Go to **Global Defaults|General Setup| Document Templates and Modify, Delete or Add to the Default Templates that are available for use.**

Retrieve the document template by clicking on **File|Template|Load**, and load the template from within the *Template Editor*. From the list of templates displayed, select the desired template from the drop-down menu to modify and click **OK**. (If you don't want to use this template, click **File|Delete**.)

STEP TWO: **Customize Document Template for Use by Agents.**

Once the template has been loaded, make changes to both the text and the merge fields. Merge fields are the fields in the document surrounded by chevrons, such as <<ProfSalutation>>. When the document template is selected from within a profile or from the results of a profile query, this merge field is replaced with the entry included in the salutation field of the profile. To remove merge fields, highlight them and press the *Delete* key on your keyboard. To insert new merge fields, place your cursor in the desired location and click *Insert Field*. A list of the various profile fields available for selection is displayed. Click on the field to insert into your template.

Margin Modification: To modify page settings in the document template, click **File|Page Setup** to select paper size, orientation, and customize margins.

Include Global Header/Footer: If you have already created a unique global header and/or footer using the Quick Steps above, by default, this area is checked off. To load a unique header/footer for this document, click *Header and Footer*. Follow the directions in the Quick Steps above to create a customized Header and/or Footer. By default once a document is launched, the system looks in the document template first for a header/footer and if none is found, uses the global document header/footer.

STEP THREE: **Click *OK* to save, load the next template and proceed to modify.**

Fifteen document templates come with ClientBase. Customize each to your agency's needs. A new blank template is provided upon loading the template editor, so you can create your own template. With the blank template on your screen, enter the text and insert the merge fields. When completed, click on **File|Save As** and name your template. All templates are automatically stored in ClientBase so a path to the file name is not necessary, just the filename. Each template's name is limited to 40 characters and should easily identify the type of letter.

Create email templates too for use with ClientBase. (**Tip:** Save with the file name of Email File Name so that they all appear in one area under Email when you select for use.)



Quick Steps to Setting Up Labels

STEP ONE: **Go to Global Defaults|General Setup|Labels and Set Up the Default Label.**

By choosing from the drop-down menu, choose an Avery label default. Click **File|Save As**, and name the label file. You cannot delete the default label settings in ClientBase, and by renaming it for your use, you can create as many different type of labels as you want.

STEP TWO: **Customize Sheet, Label, Text and Option Properties.**

When you click on a label, default fields and layout appears for modification. Also, a series of default label properties appears at the bottom of this screen. These too can be modified or used to format a custom label.

Sheet Properties: Select the label layout and dimensions. By clicking the Default Label driver, these are automatically set up for you.

Label Properties: Size of the label. By clicking on the Default Label driver, these are automatically set up for you.

Text Properties: Customize the font selection, color, style and size of the label.

Options: Special features such as zip code barcode, use of upper case, and printing labels for the primary or other address in a profile.

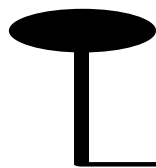
Start Position: This area is really used to easily select the position to start printing on a page of labels by the user.

STEP THREE: Click *Save*, load the next label, name it, and proceed to modify.

You may want to set up different labels to accommodate different mailings. For example, if you are mailing something to the traveller/employee rather than the profile name, you need to set up a label with fields that reflect the traveller/employee name. When completed, click **OK** to save all.

NOTES:





Set Up Invoices, Trip Proposals Itineraries & Trip Statements



When agents use the Res Card feature in ClientBase, they can produce invoices, itineraries and trip statements, while tracking invoiced and uninvoiced balances. 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 Back Office. Invoices generated through the Res Card maintain their own numbering system, separate from the numbering system of invoices generated through interface. Before generating an invoice in ClientBase, some setup is required.



Example: Travel with the Stars has three branches and wants to start generating trip proposals, invoices, itineraries, and trip statements out of ClientBase. Helen, the manager, goes into the branch setup screens, assigns unique branch invoice numbers and sets up invoice/trip statement/trip proposal/itinerary canned remarks & formats. She then goes to Global Defaults to continue setting up. Now each branch is ready to generate trip proposals, invoices, itineraries, and trip statements.!

invoices, itineraries, and trip statements.!

Helen logs in as SYSDBA or herself if she has full access, and goes to **Utilities|Branch** to input a CB starting invoice and refund number in the General Branch Info Tab. She proceeds to do additional setup under Invoice/Itinerary/Trip Proposal/Trip Statement Settings including entering canned remarks and default format settings. Once Helen has set one branch up, she can copy/paste this branch information into another one and assign unique branch invoice/ refund #'s.

Next Helen goes to Global Defaults to set up applicable settings.



Quick Steps to Set Up Res Card Documents

STEP ONE: Go to Utilities|Branch to set up Invoice #'s.

ClientBase can have its own separate sequence of branch invoice/refund numbers for use when generating invoices for the Res Card. Enter the starting Invoice Number and the system will automatically assign the next sequential invoice number each time an invoice is generated. Since *Trams Back Office* does not allow duplicate invoice numbers, be sure to start a series of numbers not currently in use in *Trams Back Office*.

STEP TWO: Setup Trip Proposal, Itinerary, Invoice and Trip Statement Canned Remarks for each Branch by going to Utilities|Branch.

The Trip Proposal/Itin/Invoice/Trip Proposal Remarks are tables providing you with the ability to capture multiple remarks then select them as desired for printing upon invoicing. Use the Add, Modify and Delete buttons to create multiple Remarks for use when launching the trip docs. Each Remark captured includes a Description, Free Flow Remarks (no character limit) and a check box for "Always Print".

Upon invoicing all Remarks with "Always Print" checked off print by default, but can be unchecked upon invoicing. All Remarks with "Always Print" unchecked will not print by default but can be checked upon invoicing. As an example, you may want different remarks printed on your invoices when invoicing a cruise vs. a package. If so, setup 2 different Remarks, one called Cruise Remarks and the other called Tour Remarks. Leave the "Always Print" unchecked and then select the desired Remarks upon invoicing. There is no limit to the number Remark entries you can add to the Remarks table.

STEP TWO: Set Up Global Defaults|Defaults Field Values for New Invoices

Determine whether a cash or check payment should be saved to the database and applied to the invoice to close the Client Balance. A separate setting can be designated for each form of payment: *Cash, Check, Credit Card and CC Merchant*. Adding a check to the form of payment indicates that upon invoicing with that form of payment, the payment is automatically saved and applied to the invoice. Removing the check from the form of payment indicates that upon invoicing with that form of payment, the printed version of the invoice shows as paid, but the payment does not get saved to the database leaving the invoice and Client Balance open.

Tip for Non-Trams Back Office Users: By leaving all these forms of payments unchecked, you have ease when voiding out invoices that are incorrect since this area is designed for use with Trams Back Office.

You can also set Default Field Values for new invoices:

Form of Payment: Set to default to either *Cash, Check, Credit Card, CC Merchant or No Default*. If the default *Form of Payment* is set to Credit Card or CC Merchant, the system automatically defaults the credit card number to the first credit card entry within the profile being invoiced.

Trip Balance Due Date: Set to default to either the *Earliest Reservation Final Payment Due Date*, or leave blank for no default.

Travel Category Defaults: Set a default *Travel Type* for each reservation *Travel Category*.

Travel Type Defaults: Set a default *Submit To* setting for each *Travel Type* as well as a default setting for *Show as Paid when Invoiced as Comm Track*. (Use this for each travel type if you want a comm track amount paid by credit card to appear in invoice totals printed for the customer.)

Tip for Non-Trams Back Office Users: By setting these up as Supplier except Hotel and Cars (Commission Track), agents will not have to change these fields each time they create an invoice.

STEP THREE: Set Up Tax and Commission Invoice Defaults by going to Global Defaults|Res Card Tax and Commission Defaults.

For non-TBO users, designate which taxes go to which tax fields when invoicing from ClientBase. If desired, for each tax field, specify the two-letter tax Identifiers of the taxes. If you have more than one Tax ID, separate them by a comma. The commission rate for vendors used in reservations is defaulting to the vendor commission field in the vendor profile. If the vendor default commission is blank in the vendor profile, then the commission defaults to the amount entered in the field called Comm Rate. **Helpful hint:** Set all to 0, if you want to enter taxes and commissions on an invoice-by-invoice basis (most agencies do).

STEP FOUR: Set up Default Field Values for ResCards/ResCard More Field Categories/ResCard Insurance Prompting and ResCard Service Fee going to Global Defaults|Res Card Defaults.

Note: You may consider revisiting this area, as most of the defaults will probably work for you to get started.

DEFAULT FIELD VALUES FOR RES CARDS allows for customization of some of your Res Cards and Reservation defaults.

RES CARD LEVEL:

Reservation Cycle: Set to default to any of User Definable drop-down options.

Default All Family Members for Leisure Profiles: Check here if you want all Family Members to automatically be displayed as passengers when you create a new Res Card.

Default Tab Displayed: Select the tab you want to default when entering the Res Card - *Reservations, Invoices, Activities, Agent Remarks, Client Feedback, Attachments, More Fields, or Edit History.*

MORE FIELD LEVEL: From the drop-down options setup for each More Field Category, select the defaults you want displayed for users.

RESERVATION LEVEL:

Booking Status: Select Confirmed, Quoted, or Cancelled from the drop-down menu.

Travel Category: Select Air, Hotel, Car, Cruise, Insurance, Miscellaneous, Rail, Tour, Service Provider, or Transportation from the drop-down menu.

Host Code: If you are using the IC/Host Utility to export invoices to a Host agency, set a default Host Code that automatically populates whenever adding a new Reservation. The Host Code currently defaults blank, but click the drop-down and select a default Host Code from the list. (Host Codes are created under Global Defaults|Host Codes.)

Filter Vendor Profiles for Travel Category Selected: If you have associated Vendor profiles with a Travel Category in the General Information tab of the Vendor profiles, check here to display only those vendor profiles of that particular Travel Category for selection off the drop-down menu.

Filter Service Provider Profiles for Travel Category Selected: If you have associated Service Provider profiles with a Travel Category in the General Information tab of the Service Provider profiles, check here to display only those Service Provider profiles of that particular Travel Category for selection off the drop-down menu.

Default Service Provider Name to Vendor Name: If you do not want the Vendor name to automatically drop into the Service Provider name field in a reservation, uncheck this option.

Reservations Imported from PNR Default to Invoiced Outside of CB+: If you do not want the Invoiced Outside of CB+ to be automatically checked off when you do a PNR import, uncheck this option.

Automatically Launch Live Connect for Live Connect Vendors: If you do not want Live Connect vendors to be automatically launched when creating a reservation, uncheck this area.

Print Address on Itin/Invoice for Hotel/Car/Insurance/Miscellaneous/Tour/Transportation: Check or

uncheck options for printing addresses on the itinerary/invoice for Hotel, Car, Insurance, Miscellaneous, Tour, or, Transportation.

Print Cruise Itin Option: Select the default Cruise Itinerary Option from drop-down, Sort by Date/List Arrive then Depart or Do Not Sort by Date/List Arrive then Depart.

Print Itemization Option: Choose the following from the drop-down for printing itemization details, Print All Itemization Details, Summarize by Passenger, Summarize by Category/Passenger, Summarize by Description/Passenger, or Do not Print Itemization

RES CARD MORE FIELDS are used for capturing any type of trip data that the Res Card currently is not prompting for, giving you the ultimate flexibility in tracking trip information. Res Card More Fields can be linked to a Trams Back Office UDID (User Defined Interface Data) field too, so upon invoicing in ClientBase, the more field entry automatically populates the appropriate TBO UDID field. When setting up the Res Card More Fields, you have the ability to link a Profile More Field to a Res Card More Field which means upon creating a new Res Card, the Res Card More Field automatically is completed with the entry in the profile more field. This means if certain client data is being captured in a profile more field and being merged into a PNR via the PNR rules for the purpose of completing a TBO UDID, you can invoice from ClientBase and automatically complete that data into any new Res Cards, and upon invoicing complete the TBO UDID with no extra steps.

Setup Res Card More Fields categories and items by following these steps:

1) Go to More Field Categories to assign a field name by going to **Global Defaults|ResCard More Field Categories**, and complete the following fields:

Category Name: Enter a descriptive name.

Profile More Field Link: Link this Res Card More Field to a Profile More Field for automatic completion when creating a new Res Card, by selecting profile more field from the drop-down menu. This field can be left blank, and only works if you currently have profile More Fields created.

UDID No.: To link a specific UDID (User Defined Interface Data) from Trams Back Office to a Res Card More Field so that upon invoicing, a Res Card the value in the Res Card More Field automatically populates the value in the TBO UDID, select from the drop-down menu. When the reservation is invoiced, the UDID fields in TBO are populated and appear on TBO invoices/reports, although they do not appear on invoices generated in ClientBase. This field can be left blank.

2. Go to **User-Defined Fields|More Field Items|Res Card More Field Items** and use *Add, Modify, and Delete* to setup the drop-down list of defaults by completing the following fields:

Category Name: Select the desired Res Card More Field category name by selecting from the drop-down menu. This listing was created when you created the more field categories above.

Item Value: Type in the desired Item Value. Click OK.

RES CARD INSURANCE PROMPTING if activated looks at the time of generating an Invoice or Itinerary for any Reservation, Service Provider or Itemization record with a travel category of Insurance to determine if the prompt should appear or not. Insurance Waiver prompting is established under Global Defaults. If none exists, the system prompts with a message: **"No Insurance Reservations Exist for this trip. Accept or Decline Insurance."** Declining insurance then includes an agency- defined waiver message for printing at the bottom of the Invoice or Itinerary.

Turn on Insurance Waiver Prompt for Invoices: Check to activate this prompt.

Turn on Insurance Waiver Prompt for Itins: Check to activate this prompt.

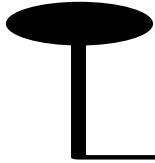
Default Insurance Vendor: If desired, select a default insurance Vendor from your drop down list of Vendor profiles for defaulting new Insurance Reservations.

Default Insurance Waiver Message: If insurance is Declined, a customized Waiver message can be printed on the Invoice/Itin. Type your waiver message into this free flow text area. This message will appear at the bottom of each Invoice/Itin (underneath any Branch Remarks).

RES CARD SERVICE FEE: Create a vendor profile for your agency and set the default commission to the desired amount (usually 100%). Type in the default vendor (your agency name) and service fee amount and click *OK*. When agents click the Service Fee button in res card, it launches this setting as a reservation.

NOTES:





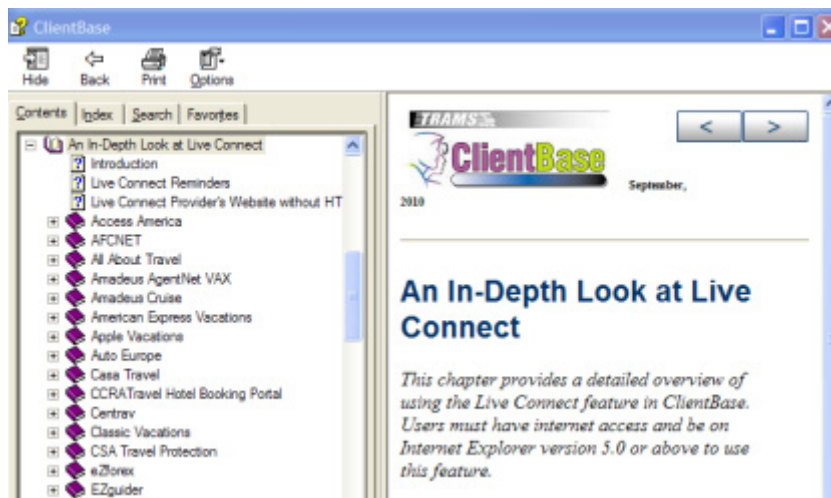
Set Up Live Connect



Save time and improve efficiency by transmitting selected client information to a booking engine on-line. Then electronically transmit back reservation details and automatically complete the reservation form with what's been booked! Print out client quotes or itineraries, generate invoices and trip statements. (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 Back Office.)



Example: Benjamin Primm wants to set up Live Connect for his agents to use with ClientBase. First he contacts all Live Connect Providers he wants to use, and obtains all startup materials. Next, he makes sure all Live Connect Vendors are set up correctly. After that, his agents are ready to use Live Connect.



Since each Live Connect Provider is set up differently, Benjamin looks in the Helpfiles for complete directions on how to do one time set up for that particular provider and what features that Provider uses. Once setup is complete, agents can immediately start using Live Connect.



Quick Steps to Set Up Live Connect

STEP ONE: Sign up with each Live Connect Provider (booking engine) you are going to use to book reservations.

Obtain a unique User Login and password from each booking engine directly (contact information is found in *Help* files under *An In-Depth Look at Live Connect* and clicking on the Provider's name.

STEP TWO: Enter Logins/Passwords if the Provider passes them to website (more and more Providers are restricting this process). Look in helpfiles to find out if the provider you are setting up passes this information. Log into ClientBase as the SYSDBA and click on Utilities|User Logins|User List. (Each agent can do this themselves if they have permission by going to Utilities|My Login. Also if the same password and login is the same for all agents, just enter it under Global Defaults|Res Card Defaults|Live Connect Logins.) For each User Login, add a Live Connect Login by first clicking on the Live Connect Tab under the User Settings and then on Add. Complete the following fields:

Live Connect Provider: Only a Live Connect Provider which is available for your use is listed on the drop down menu list. Select one that you have registered with.

User Name: For each Live Connect Provider, enter the unique User Name assigned to your agency or to each user within your agency when you registered.

Password: For each Live Connect Provider, enter the unique Password assigned to your agency when you registered. Not all Live Connect providers require a password. The field will be dimmed if that is the case.

Account Number: For each Live Connect Provider, enter the unique Account Number assigned to your agency when you registered. Not all Live Connect providers require an Account Number. The field will be dimmed if that is the case.

STEP THREE: Some Live Connect Providers (booking engines) provide you with vendor codes for each of its participating vendors. Create a profile in ClientBase for each vendor and specify the booking engine together with this unique vendor identifier if necessary.

To do this first retrieve or create the vendor profile from which you would like to book using Live Connect. Click on the Live Connect Providers button in the General Info tab, and then on Add to add a Live Connect Provider. Select the booking engine (Live Connect Provider) from the drop-down menu and enter the vendor code if one applies. Look in helpfiles for the vendor codes for each Live Connect Provider.

When you have finished this setup, you are ready to use Live Connect. Test this by creating a new reservation and entering a vendor. Launch Live Connect to see if you successfully go to the Live Connect Provider's website.

Live Connect not working correctly? Go to www.trams.com, click on *Support|Known Live Connect Issues*. This lists all current problems with Live Connect Providers.

Set Up Batch Reminders, Required Fields & Default Values for New Profiles



Quick Steps to Set Up BATCHED REMINDERS

Batch Reminder Settings enable you to assign multiple reminders at one time to a res card. Although you can add unlimited batches to this area, a default Cruise/Tour Batch has been created for you.

STEP ONE: Go to **Global Defaults|Res Card Defaults|Batch Reminder Settings**. Click *Add* to add an additional batch, *Modify* to edit an existing batch, or *Delete* to remove a batch.

STEP TWO: Fill out the *Batch Reminder Name* and *Description*, and click *Add* to add the first batch reminder, and fill out the following information:

Create Reminder: From the drop-down menu, select *Optional* or *Always*. 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*, *ResCard Start Date*, or *ResCard Return Date*.

Plus/minus|Number of Days: From the drop-down menu select the plus or minus sign and choose the number of days to use in combination with the *Default Date Using* field.

To-Do: Check here if you do not want to set a specific time for this Reminder to appear on your Day-At-A-Glance. All timeless activities appear on a separate area in your calendar, but not under a specific time frame.

Start Time: Enter time if you want alarm to start alerting you about this Reminder; or if you want this Reminder to appear on your Day-At-A-Glance on your calendar as an appointment under the time you specify.

Duration: Specify a block of time for this task to appear on your calendar.

Login Name: Will default to the User logged into the system. Choose a different User by clicking on the drop-down menu.

Priority: Click on the drop-down menu to tag this Reminder with a priority level - high, medium, or low. The Priority Level can be used as search criteria in both Level 2 Query of the Activity Manager and viewed in selected Activity Reports.

Private: Check this box if you want the note to be private. Only the sign-in agent and SYSDBA can access the Reminder.

Reminder Type: Enter the type of follow-up for the Reminder by clicking on the drop-down menu and picking from a customized list. Such types may include phone call, E-Mail, letter, etc. Reminder types are user-defined and set up in **Global Defaults|User Defined Fields|Reminder Type**.

Subject: Enter the subject of the Reminder by clicking on the drop-down menu and picking from a user-defined list. Subjects are set up in **Global Defaults|User Defined Fields|Reminder Subject**.

Set Alarm: To further assist with remembering important tasks, ClientBase Reminders include an optional alarm. Like the alarm which awakens you each morning, the alarm activates at the time designated within the Reminder (regardless of where you are in the ClientBase program, or any other program) as long as ClientBase is running on your PC. When an Alarm is activated, a window appears that includes the details of the Reminder along with three options:

Completed: This field is empty until the Reminder is completed and a date is entered. Entering a *Complete Date* takes this Reminder off the To-Do list.

Remarks: Enter any additional remarks or instructions in the text box at the bottom of the Reminder entry screen.

STEP THREE: Continue entering additional reminders for this batch.



Quick Steps to Set Up Required Fields

Database Administrators can designate certain fields within a Profile, Activity or Res Card record as a mandatory field that must be completed for the record to be saved.

STEP ONE: Go to Global Defaults|Required Fields|Profile Fields.

By default no fields in a Profile are set as mandatory, but by going into and selecting the record type, set any field as either "Required", which means you cannot save the record without completing this field; or as "Optional" which means you get a prompt when saving the record. If this field is left blank, the system still allows you to save the record.

STEP TWO: Repeat setting up required fields for Activity and Res Card fields.



Quick Steps to Set Up Default Field Values for New Profiles

Assign default field values to certain fields when a new profile is created. The following fields can be assigned a default value with this new feature: Courtesy Title, Zip Code, City, State, Country, Salutation and Interface ID. But our suggestion is to leave these alone except for the Interface ID particularly if you have Trams Back Office.

STEP ONE: Go to Global Defaults|Default Field Values for New Profiles|General Tab.

If you want a default field value for *Courtesy Title*, choose the default off the drop down menu. Items in this menu were setup under *Global Defaults|User Defined Fields*.

STEP TWO: Click the Address Tab.

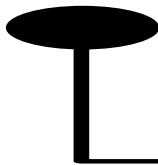
If you want a default field values for Zip Code, City, State, and Country, choose the default off the drop down menu. Items in this menu were setup under *Global Defaults|User Defined Fields*.

STEP THREE: Click the 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>.

STEP FOUR: Click the Interface Tab.

In the Interface ID 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>; <GENERATOR> with starting number set by agency, or <MASK> based on the Full Name field, First Name field, Last Name field, the Residential Phone field, or a combination of the all those fields (from 1-10 alpha-numeric characters).



Streamline Marketing with Point-and-Click Codes

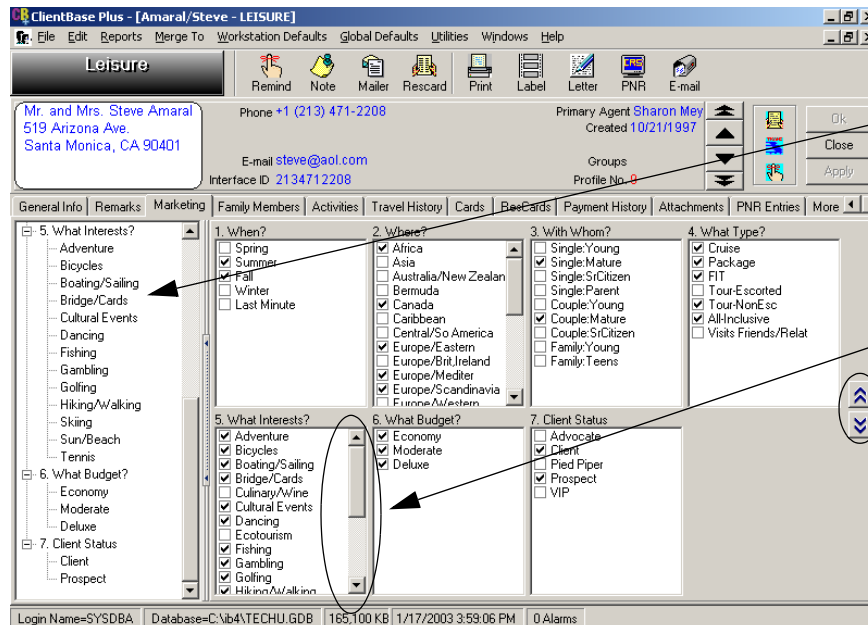


The Marketing Tables in ClientBase identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. These marketing codes make it possible to consistently put the right product in front of the right client, by both your front-line agents and your marketing programs geared towards generating travel interest. In addition, labels, letters, and e-mails can be 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 consistency among your clients and simplicity for your agents.



Example: Steve Amaral 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 Steve'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 Steve is included with the other qualified clients you are tempting with the great deal!



Tree View summary of Client Travel Interests.

Scroll Up & Down for More Interests.

Use these arrows to see more marketing categories.



Quick Steps for Tailoring Your Global List of Marketing Codes

STEP ONE: Tailor the name of each Marketing Category.

From the main ClientBase screen, click on *Global Defaults|Profile 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.

STEP TWO: Tailor the Marketing Codes included in each Marketing Category.

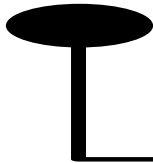
From the Main ClientBase Screen, click **Global Defaults|Profile Defaults|Marketing Codes**. A list of any Marketing Codes already setup in the system appears, including the category name and the code value. From here you can Add, Modify or Delete marketing codes.

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. A warning message appears advising you of the number of profiles with that marketing code attached. Once you delete the marketing code, it deletes it out of each profile. All marketing codes need to be deleted first, before you can delete a Marketing Category.

Note: If many profiles have been tagged with a marketing code, using Level 2 Query to call up profiles that have this marketing code checked off and remove it using **Utilities|Global Modify**. Then delete the marketing code as above.



Setting Up E-mail for MAPI or SMTP



There are two E-mail options available for using ClientBase's Merge to E-mail feature: **MAPI** (Messaging Application Protocol Interface) and **SMTP** (Simple Mail Transfer Protocol). **MAPI** requires use with compatible E-mail programs such as Microsoft Outlook, Microsoft Express, Netscape and Eudora. The **SMTP** option offers 2 benefits: It does not require a MAPI compatible E-mail program for the Merge to E-mail feature in ClientBase to work, and with this option, you can use extensive text formatting, even using HTML, as well as using Document Templates within your E-mail messages.



Example: Rainbow Travel wants to start sending out specials in HTML format. Jim, the database administrator sets up each agent with SMTP E-mail. If any outside agents wants to overwrite these selections to use MAPI compatible E-mail, they can do so at the Workstation level.

First, the ClientBase database administrator, Jim, goes to **Utilities|User Logins|User Lists|E-mail Settings**. He carefully completes the necessary SMTP settings and does this for each of his users.

Next, Jim makes sure that under **Workstation Defaults|Environment|E-mail Settings**, the *Default E-mail Client* is set to <ignore>. Agents who want to overwrite what Jim has set up in the User Logins can do so in here, by customizes settings for their own E-mail preference.



Quick Steps to Setting Up MAPI E-mail

STEP ONE: Be sure you are MAPI Compatible.

Some sample MAPI compatible E-mail programs include Microsoft Outlook, Microsoft Express, Netscape, and Eudora. To learn if your E-mail program is MAPI compatible, we recommend you visit the website of your E-mail provider and search for information on MAPI compatibility. When you install the ClientBase program, MAPI is the option which is defaulted in the User Logins.

STEP TWO: Go to **Utilities|Users Logins|User List**.

To obtain a list of all User Login records, log into your database as SYSDBA (System Database Administrator). Highlight each User Login, click *Modify* and select the *E-mail Settings* tab. The *Default E-mail Client* is *MAPI*. No further setup is required.

STEP THREE: Click *OK* to save.

STEP FOUR: From each workstation, sign into ClientBase and go to **Workstation Defaults|Environment**. Unless you need special workstation settings to override your User Settings setup by the SYSDBA as described above, verify that *Default E-mail Client* is set to *Ignore*.



Quick Steps to Setting Up SMTP E-mail

STEP ONE: Find Your Mail Server's SMTP Settings

SMTP is a standard protocol (language) used for sending E-mail on the Internet or a network. Every mail server is capable of handling SMTP E-mail. Your agency can utilize this SMTP feature providing it has the proper mail server configuration.

Contact the entity responsible for maintaining your mail server to confirm your SMTP settings:

1. If you are hosting your own E-mail server, contact the tech person who maintains or originally set up the server.
2. If you are using another party for your E-mail server, contact them by going to their website or calling their support line.

You'll need to obtain the following information:

- Your outgoing mailserver name (e.g., mail.domainname.com, smtp.domainname.com, or gmail.wspan.com).
- E-mail account login and password if authentication to SMTP mail server is required.
- TCP/IP Port used for E-mail. (Usually Port 25, but confirm this with your network administrator.)

STEP TWO: Setting Up ClientBase with Your Mail Server's SMTP Settings. Go to **Utilities|Users Logins|User List**.

To obtain a list of all User Login records, log into your database as SYSDBA (System Database Administrator). Highlight each User Login, click *Modify* and select the *E-mail Settings* tab. Change the default *E-mail Client*

from *MAPI* to *SMTP Client*, from the drop down list.

STEP THREE: Complete the *User Login SMTP Settings* obtained from the entity responsible for maintaining your mail server:

Default E-mail Client: Choose SMTP off the drop down menu.

Default SMTP Mode: Offers different options for creating the body of the E-mail message. Select either *Formatted Text*, *Document Templates*, *Raw HTML* or *Plain Text* from the drop down list. This setting determines the default *Mode* when using the *Merge to E-mail* feature, but can be changed when sending an E-mail.

Outgoing Mail Server: Enter your outgoing mail server name determined in your steps above. Examples: mail.domainname.com, smtp.domainname.com, or gmail.wspan.com).

Port: This setting defines the TCP/IP port which your E-mail application listens on for incoming mail. If left blank, this setting uses port 25 by default, which is the Internet standard for receiving SMTP mail. In some situations, you may have chosen to move the SMTP service to another port. Perhaps you already have a service on port 25, and you do not want the services to conflict over the port assignment. In such a case, enter the port ClientBase should use.

From E-mail Address: Enter the E-mail address for the User Login you are setting up. The address entered here appears as the from address for all E-mails sent from this User. If you wish to change this address frequently, you can do so at the E-mail level when you are sending it out.

In the From E-mail field, if you type **joseph@Trams.com** and a message is sent, you see the From field saying **joseph@Trams.com**. Some people prefer it to look like this instead, **Joseph Melika**. To have it appear like this, type **Joseph Melika<joseph@Trams.com>** instead of just **joseph@Trams.com**. You can also use your company name or department name; for example, **Travel With the Stars<sales@TWTS.com>** or **Star Travel Marketing<sales@TWTS.com>**.

Login Type: Set to either *None* or *Simple Login*:

Simple Login: A setting used to authenticate your connection to the SMTP mail server by forcing a USER Name and Password. If your network login does not handle this authentication automatically, then set this field to *Simple Login*.

None: If your agency is hosting your own E-mail server and your network login has been configured to handle the authentication to your SMTP Server automatically, set this field to *None*.

E-mail Account Login and Password: Use when *Login Type* is set to *Simple Login*. Enter your E-mail Account Login and Password here.

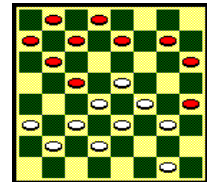
STEP FOUR: Click *OK* to save.

STEP FIVE: From each workstation, sign into ClientBase and go to **Workstation Defaults|Environment**.

Unless you need special workstation settings to override your User Settings setup by the SYSDBA as described above, verify that *Default E-mail Client* is set to *Ignore*.



Maintain Your ClientBase Database With Profile Dupe Checker

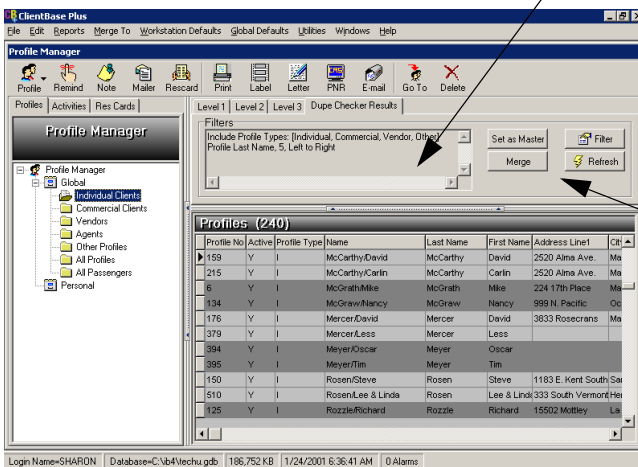
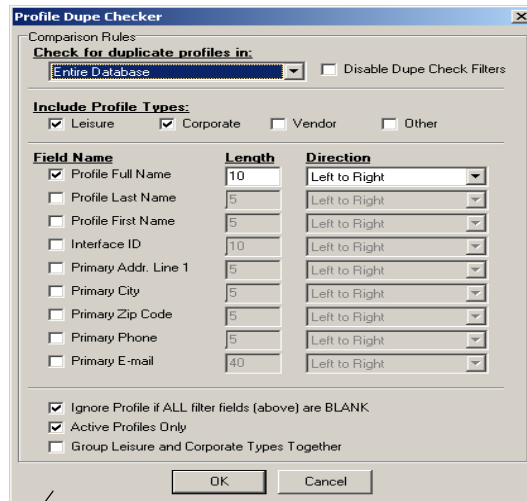


As your customer database in ClientBase grows, so does the possibility of having duplicate profile records for the same entity. Many of you who have Trams Back Office already have loads of duplicate client and vendor profiles. Since duplications only water down the effectiveness of your database, a utility has been created in ClientBase that lets you identify common criteria within multiple records that can be used to display *possible* duplications in your system. The program then allows you to set one profile as the *master* and then merge the duplicate profiles into that master profile. Then you can delete, or mark as inactive, these unwanted profiles.



Example: Mary, the agency manager, wants to clean up duplicate profiles. She sets up the Profile Dupe Checker. Ensuring that the duplicates displayed in the Results Screen are valid, she chooses the master for each duplicate and merges other profile data into it. Thereafter, Mary maintains a regular Profile Dupe Checker schedule.

Mary goes to **Utilities/Profile Dupe Checker** and checks off the profile type (Leisure), Field Name, Length and Direction. Keeping it simple, she uses only the Last Name, Address 1 and Phone as the criteria and clicks on OK.



The profiles with common elements are displayed shaded in grey on the Results Screen. After reviewing, Mary then decides which profile is the “Master” highlights it and clicks on *Set as Master*. She then highlights the profile/s she wants to merge and clicks on *Merge*. Mary repeats this process for each profile type and thereafter maintains a regular Profile Dupe Checker schedule.



Quick Steps to Use Profile Dupe Checker

STEP ONE: **Backup your database** using the Trams Backup utility by going to **Start|Programs|Trams|Trams Backup Restore**. (There is no "Undo Merge All" feature!)

STEP TWO: **Access the Profile Dupe Checker.** Go to **Utilities|Profile Dupe Checker**, right-mouse click in the results screen after performing a Level 1, 2, or 3 query and click *Dupe Check*, or in the Profile Manager Screen, click the *Dupe Checker Results* tab and then *Filter* to access the Profile Dupe Checker utility.

STEP THREE: **Do the Comparison.** Designate the criteria with which the system searches and compares profiles. Be sure to include aggressive filters to narrow your results as much as possible. You do not want to merge profiles that really are not duplicate profiles after all.

Check for duplicate profiles in: From a drop-down menu, select the type of profiles to include in the duplicate search. Choices include *Entire Database*, *Current Results in Level 1 Query*, *Current Results in Level 2 Query*, and *Current Results in Level 3 Query*. If you do not want any filters on profiles, check *Disable Dupe Check Filters*.

Include Profile Types: Select the type of profiles to include in this duplicate search. Check any or all profile types by clicking once on the check box. (**Hint:** It may be easier to search for duplications one profile type at a time except in the case of Leisure/Corporate.)

Field Name, Length, Direction: Select the fields to compare and search for common entries. The fewer you select, the more results you are likely to find. The more you select, the more discriminating the system is in displaying possible duplications.

To select a field name, place a check in the box by clicking once. Then, the length of the field search and direction can be established. The length is a numeric field, indicating the number of characters within that field to be compared. Select the direction by clicking the arrow to the right of the field and choosing either *Right to Left* or *Left to Right*.

Keep it simple, perhaps using only the Last Name, Address 1, and Phone (or e-mail) as criteria. By default *Ignore Profile if ALL filter fields (above) are BLANK* is checked. Also defaulted is the checked box, *Active Profiles Only* if you don't want to include profiles that have been designated as "inactive." Since duplicates can exist within inactive profiles, unchecking this box may produce more thorough results. To display duplicate corporate and leisure profiles grouped together, check *Group Leisure and Corporate Types Together*.

The system compares profiles, then displays a list of all those with common elements sorted by the fields used as search criteria. For example, if last name and e-mail are the search fields, all profiles with the same last name and e-mail are listed together shaded in gray or blue in the results screen of the profile manager under the Dupe Checker Results tab.

Keep in mind the resulting profiles with common data may not actually be a duplication of the same customer. For example, if the criteria entered for doing the comparison are last name and first name, your results may include different customers with the same name.

STEP FOUR: **Decide which profile to use as the Master (the one that information is merged into).** You can manually select the Master profile from within each dupe grouping by clicking on the desired Master Profile and clicking *Set as Master*. You can also use *Auto Set Your Masters* which allows you to set a Master for every dupe grouping all at one time by using the profile within each that has either the *Earliest Creation Date*, *Latest Creation Date*, *Earliest Modified Date* or *Latest Modified Date*.

(When using *Auto Set Masters*, be sure to follow step 5 below.)

STEP FIVE: **Review your entire listing of possible dupe groupings to identify any groupings that are not definitely duplicate profiles and un-select the master profile so they do not result in merging.** For example, your Dupe Check results may include 100 profiles made up of 40 possible dupe groupings. You may determine that 5 of those possible dupe groupings may not be dupes and so you do not want to merge them. Be sure to unset those Masters so they do not get merged. This is done by individually highlighting each undesired Master (the profile in red) and clicking *Set as Master*, a button, which toggles between set and unset as Master (profile is no longer in red). Any dupe grouping without a Master set will not get merged. You can also use this technique to

change the Master profile set by the *Auto Set Master* feature in the cases where you would prefer a different master than the one selected by the *Auto Set Master*.

Next, highlight the profile you want to merge into the master and click *Merge* if you are merging profiles one at a time, or *Merge All* if you want to merge each grouping of dupes within the Dupe Check results that has a *Master* profile set for that grouping, all at one time.

Upon clicking either *Merge* or *Merge All*, the system prompts with a screen that allows you to select and include merging data from the following profile tabs: *Addresses, Communications, Special Dates, Cards, PNR Entries, Family Members/Employees, Groups and Attachments*. (The system automatically merges all Activities, Marketing Codes, Res Cards, Invoices, Payments and Unapplied Balanced from the duplicate profile into the profile designated as the Master profile.)

When including any of these tabs of data in the profile merge, all data is appended to existing data within the master profile and removed from the duplicate profile. Place a check next to each tab you choose to include in the merge. These check marks are saved locally and will be "remembered" the next time you merge profiles from the Dupe Check feature.

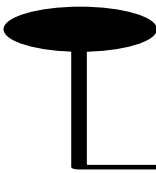
Delete Profile/Set Profile to Inactive: Once deleted, all data from the old profile not included in the merge is erased. If you are unsure you may want to say no to deleting and mark these profiles, once merged into the master, as inactive instead.

Upon clicking *OK*, the merge takes place. If you have selected *Merge All* you will receive a prompt with a message *XX Profiles will be merged into 14 Masters. Merge ALL profiles to their Masters?* Verify that the numbers align with what you are trying to merge before selecting *OK*.

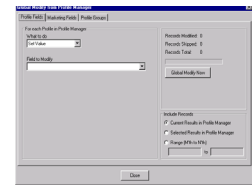
Note: Sync Activated databases can only be set to inactive rather than deleted upon merging. This setting has been hard-coded to reduce the potential for unresolved items to occur during synchronization as the result of one location updating a profile while the other location is deleting that profile via Dupe Checker.

***Important Note:** Steps 1 and 5 are the most important steps within this process. Once a profile is merged to another, there is no way to "un-merge" them so you want to be very careful that you review the listing of potential dupes and unset any Masters that you have any question are not actually duplicate profiles. We also recommend that you limit access to this feature via your ClientBase User permission settings (go to **Advanced Permissions|Menu Options** and uncheck *Profile Dupe Checker* within the Utilities menu options when you set user up by going in as SYSDBA and clicking **Utilities|User Logins**). Consider this a power tool that should be used with great caution and proper training.

STEP Six: **Maintain Regular Dupe Checker Schedule.** Maintaining a rich (yet clean) database of accurate customer information improves the effectiveness of every marketing effort. Run the dupe checker regularly to eliminate duplicate profiles.



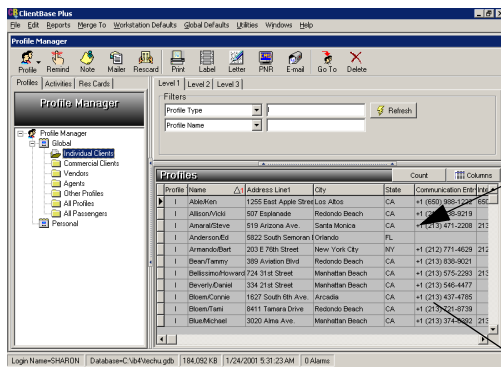
Improve Efficiency With Global Modify



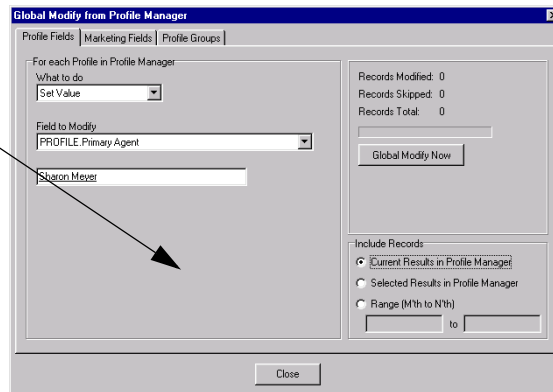
Global Modify allows you to change multiple profiles simultaneously without having to enter each profile to make the desired change. Use this feature to enter a value in a profile field or replace an existing value in a profile field. Use the Global Modify feature to add or remove a Marketing Code, or to Add, Remove, or Change Profile Group Names.



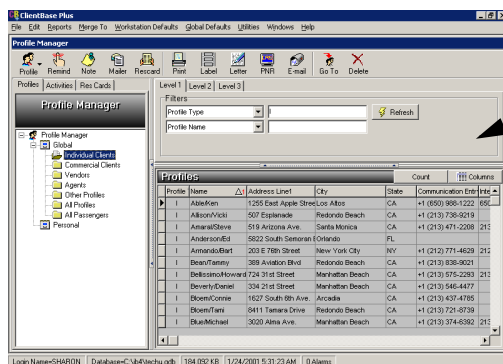
Example: For example, you have an agent, Mary, who left your company and is listed as the primary agent in a number of corporate profiles. You have assigned a new agent, Sharon, to these corporate clients and want to replace Mary's name on all the corporate profiles with the Sharon's.



Use Level 2 Query to display all Mary's corporate profiles in the Results Screen.



Go to Utilities/Global Modify and under the Profile Fields set the Profile Primary Agent field to SHARON. Include Current Results in the Profile Manager box, and click *Global Modify Now*.



Check one of two profiles to make sure the global modify has worked.

IMPORTANT NOTE: Before you do any global modify, make sure to do a backup first!



Quick Steps to Using Global Modify

STEP ONE: Perform a backup of the ClientBase Database by going to Start|Programs|Trams|Trams Backup/Restore.

When you use global modify, you make permanent and automatic changes, therefore, we suggest you backup your database before using this feature. In doing so, you will find that you are covered in case you change something unintentionally. If you have a backup, you have the option to overwrite the changes you have made and try again.

STEP TWO: Query your database.

Use the Level 1, 2, or 3 Queries for the profiles, activities, or res cards to modify. In the above example, to replace one agent in a profile with another, go to the Profile Manager tab for this query. Select Level 2 query, click Filter, and enter the original agent in the Primary Agent field. Click OK to execute the query.

STEP THREE: Select Utilities|Global Modify and indicate whether to input, set a value in a field, or exchange the values in a field with the values in another field.

Globally Modifying Profiles: Select *Set Value* or *Exchange With*. Fields available to modify:

Profile: Last Name, First Name, MI, Courtesy Title, Interface ID, Primary Agent, Branch, Web ID, Web Password, Referred By, Salutation, Creation Date, Create By, Active, Vendor Commission % (Vendor Only), Travel Category (Vendor Only),

Primary PhoneTable/FaxTable: Country Code, Area Code

PhoneTable, FaxTable, EmailTable: Marketing Permission

PrimaryAddrTable, BillToAddrTable, ShipToAddrTable, AlternateAddrTable: Address Line 1/Line 2, Apt/Suite, City, State, Zip Code, Country, Description

More Fields

Marketing Codes: Add or remove marketing codes from query results.

Groups: Add or remove groups from query results.

Globally Modifying Activities: Globally modify Activities or Profiles to which Activities are linked. Select *Set Value* or *Convert Type*. Select *Activity to Modify* (*Reminders, Notes, Mailers*). Fields available to modify:

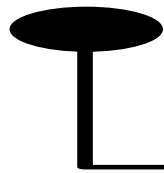
Activity: Date of Reminder, To Do, Login/Created Name, Priority, Private, Type, Subject, Completed, Remarks.

Globally Modifying Res Cards: Globally modify Res Cards or Profiles to which the Res Cards are linked. Fields available to modify:

Rescard: *Status, ResCycle, Create Agent, Marketing Source, Group Name, Branch #, Trip Name, Locator #, and Region/Destination*

STEP FOUR: Identify Records to Include. On the bottom right side of the Profile Fields and the Marketing fields screen, there is a setting called Include Records. This defines whether you use all the profiles that are in the profile query result screen, or use only ones that have been highlighted and selected. You also have the ability to apply changes to a range of profiles within the current results. When selecting Range (Mth to Nth), enter the range of profiles you want to Global Modify. This range is based on the line number from and to within the results of the current query.

STEP FIVE: Click Global Modify. Finally, select *Global Modify Now*. Confirm that you want to global modify. Remember, this makes an automatic change that is not reversible. Please check your steps carefully before committing. Click Yes to continue or No to cancel. You are notified once the global modify is complete. You also see statistics of how many of the total records were skipped or modified.



Using Merge to File, Merge to File Handoff, & Export



ClientBase provides agencies with the ability to export data in three different ways. For your own protection, make sure that only the ClientBase Database Administrator has the ability to export files using these utilities.



Quick Steps to Merge to File

Merge to File: You can use the results of a profile query to Merge to File. This enables you to create a text (.txt) file which can be E-mailed to a location of your choice or put on a disk. This is particularly useful for agencies who use mailing houses to do bulk mail or need to send their computer lists to consortiums for special mailings.

STEP ONE: Query the profiles you want to merge to file.

The first step in using the Merge to File feature is to use the Profile Manager to find the profile(s) you want to merge to the File.

STEP TWO: Go to Merge|File.

Fill in the File name and select to which folder or disk you want the file exported; select type of delimiter you used to create the fields (usually tab); specify if you want to Include Field Names; and select which records you would like to include.

STEP THREE: Click Export to Merge to File.

By clicking "Export", your file is created and ready for you to either E-mail or send to the recipient.



Quick Steps to Merge to File Handoff

Merge to File Handoff: The File Handoff feature is a streamlined approach to creating and sending files to another entity, such as a mailing house or consortium for participation in a direct mail program. The Merge to File Handoff uses a Wizard approach, walking you through setting up the ASCII file, keeping a history within the profiles included via a Mailer record, and then sending the file via E-Mail (or saving to disk).

STEP ONE: Query the profiles you want to use with Merge to File Handoff.

Use the Level 1, 2 or 3 Query to query your database for just those profiles you would like included in the ASCII file created by this feature. Use also the Edit Menu or right mouse click in Results Screen to "Invert All", "Select All" or "Unselect All" in your Results Screen.

STEP TWO: Go to Merge|File Handoff.

A wizard appears for you to identify what profiles to include, what address information to include and what Branch ID should be used for any profiles that do not have a Branch ID associated.

Please note, the Branch ID is mandatory to ensure that each profile from your database is associated with your agency or branch identification, in case the file is consolidated into a larger database of other agency profiles. The Branch ID can be entered here or by going into the Utilities Menu, selecting Branch, using Modify to enter the Branch record, and then completing the Branch ID field, located to the right of the Pseudo City field.

STEP THREE: Map Marketing Tables

The file created by this process is hard-coded to include 7 Marketing Fields labeled with the field names of When, Where, With Whom, What Type, What Interest, What Budget and Client Status.

Map the marketing tables in your database to the appropriate marketing field in the file by clicking on the down arrow next to each marketing field, and selecting from your drop down list of marketing tables. If your agency does not maintain a marketing category for any of the 7 hard coded marketing fields, then simply leave that field blank.

STEP FOUR: Select Delivery Method

Select the delivery method of either E-Mail (MAPI or SMTP) or Save to Disk. If either MAPI or SMTP E-Mail is selected then an E-Mail message will appear and the ASCII file will be automatically attached.

STEP FIVE: Click *Finish* to Complete the Export

Review a summary of the options selected so far in Steps 1 to 4. Use the *Previous* button to go back and make any changes. Click *Mailer* to create a mailer record for those profiles included in the file. Click *Finish* to create the file and complete the handoff.



Quick Steps to Export File

File Export: This is the most robust export option in ClientBase. The File Export menu item provides the capability to export even more ClientBase data into files. This exported data can be used in web site design or for loading into other software programs.

STEP ONE: Query the profiles you want to use with File Export.

Use the Level 1, 2 or 3 Query to query your database for just those profiles you would like included in the ASCII file created by this feature. Use also the Edit Menu or right mouse click in Results Screen to "Invert All", "Select All" or "Unselect All" in your Results Screen.

STEP TWO: Go to File|Export.

File Name: Start the Export File process by naming the new file and selecting the created file's location. By clicking on the selection box directly to the right of the File Name field, a dialog box appears to make your selections.

ASCII File Type: Select Comma or Tab Delimiters.

Include Field Names: Check this box to include field names (also known as headers) in your Export File.

Export Clean Address Data Only: Check here if you do not want incomplete addresses to be included in export file.

No Sorting: Check here to create a file that is not sorted to lessen compilation time.

Include Records: To determine which profile records are included in the export file, select Current Results in Profile Manager, Selected Results in Profile Manager or Requery Profile Manager.

Include Columns: From the drop down menu, select from which columns you wish to choose - Profile General Information, Profile Marketing Information, Profile Passenger Information, or Profile Card Information. Each selection has a separate list of fields available for including in your exported file.

Include Marketing Information: If the Include Columns is set to Profile General Information, then this check box appears. If in addition to the fields included in the General Information folder of a profile, you want to include the marketing categories and codes included in the Marketing folder, check this box. Upon selection, notice that you must choose a Marketing Information delimiter - either a caret or a semi-colon. Each marketing category will be separated with a comma or tab (as designated in Ascii File Type), and multiple codes within a category will be separated with either the caret or semi-colon depending on which is selected here.

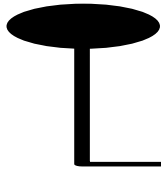
Fields Available/Fields in Export Files: Based upon the item selected in the Include Columns field, a listing of Fields Available will be included to the left. This listing represents all fields that you can include within the file you are exporting.

To add a new field to the file you are exporting, highlight the field name in the Fields Available area and use the right chevron to move it to the Field In Export File area using the right chevron (>). To remove a column from the Field In Export File area, highlight the field you do not want to include and use the left chevron (<) to move it over to the Fields Available area. These fields can be reordered by using the U and D arrow keys located to the right of the field.

To add all fields in the Fields Available area to the Field in Export File area, use the double right chevron (>>). To move all fields from the Field in Export File area to the Fields Available area, use the double left chevron (<<).

STEP THREE: Click **Export**.

Once all fields to be included meet your needs, click *Export* to complete the export and generate the file.

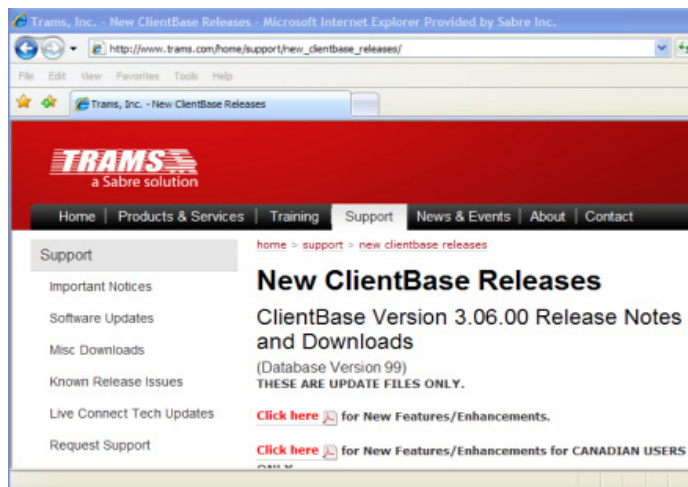


Download New Releases & Update Your Database

When there is a new ClientBase release, your agency is notified via E-mail. To download the release, go to www.Trams.com and click the download link. Complete instructions on how to install the release on the ClientBase server and workstations, as well directions on how to update the database are included on the download site. There are also release notes on New Features; General, Res Card, and Live Connect Enhancements; and Fixes and Cosmetic Changes. Of course when you update ClientBase, the Help Files, Overview Files, and Manual Files are automatically updated as well.



Example: Travel With The Stars received an e-mail stating there is a new release of ClientBase. Linda, the manger, goes to the www.Trams.com website, updates the server, workstations, and database. After printing out the release notes, she knows what's new in the program. Anytime she needs complete instructions, she clicks on the updated help files inside the program.



Linda makes a full backup of ClientBase and makes sure everyone is out of CB and TBO. She goes to www.Trams.com, clicks *Support*|*Product Updates*, and clicks *ClientBase*.

Linda then follows instructions on the Web site that outlines how to upgrade the server, the database, and the workstations. She looks over the release notes (or prints them out), so she can see how the program has changed.



Quick Steps to Download & Update

We now offer two (2) different upgrade files for you to choose from. The first file is a full "UPDATE" file and upgrades your program from any previous version to the current version. This file is quite large. The second file is a "PATCH" and is quite small but will only upgrade you from the previous version to the current version. Step 3 is not needed if you are installing just the PATCH file.

STEP ONE: Go to *Start*|*Programs*|*Trams*|*Backup/Restore*.

Do a backup before doing any kind of upgrade. Also, be sure everyone is logged out of both ClientBase and Trams Back Office.

STEP TWO: Update the ClientBase exe (program) on the ClientBase Server.

Save the upgrade CBUPDATExxxxx.exe or CBPPatchxxxxx.exe (CBPCANUPDATExxxxx.exe or CBPCANPatchxxxxx.exe for Canadian installations) file to a drive accessible to all workstations. Run this file first from the ClientBase server. This can be done by going to **Start|Run**, then selecting the drive:\directory\ where the file was saved and select the CBUPDATExxxxx.exe or CBPPatchxxxxx.exe. Click *OK*.

Select *OK* on the Welcome screen to start the upgrade process. Choose the Destination Directory. The system defaults to the c:\program files\Trams\cbplus\directory. If you changed this during your initial installation please click on browse and select the proper destination folder. Next you get prompted to backup your current ClientBase exe's, press Yes, then *OK* to the default backup directory. The upgrade process begins and upon completion you are prompted with a message "Your copy of ClientBase has been upgraded to Version x.xx.xx. This computer needs to reboot to complete the upgrade process." NOTE: With this upgrade, you must restart your server upon completion of the installation.

STEP THREE: Run the ClientBase Database Update to upgrade your database if you are using the full UPDATE file.

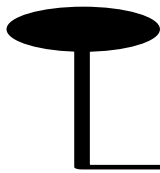
The ClientBase exe (program) has been updated on your server, and now you need to upgrade your database to work with this Version. This is done only once at the Server, by going to **Start|Programs|Trams|Database Update**. Identify the path to your ClientBase database file (Trams.ib or .gdb in older versions), then enter the SYSDBA login and password. Press *OK* to begin the upgrade. Upon completion you get a message indicating the upgrade is "Done". Before going to Step Four and installing the ClientBase upgrade at each workstation, verify that you can connect to the database from the server, by logging into ClientBase and your database.

STEP FOUR: Upgrade the ClientBase exe (program) at each workstation.

From each workstation setup for ClientBase, upgrade the program to x.xx.xx by running the upgrade file CBUPDATExxxxx.exe or CBPPatchxxxxx.exe (CBPCANUPDATExxxxx.exe or CBPCANPatchxxxxx.exe for Canadian installations) that was downloaded to a network drive in Step Two. This can be done by going to **Start|Run**, then selecting the drive:\directory\ where the patch file was saved and select the CBPPatchxxxxx.exe. Click *OK*.

Select *OK* on the Welcome screen to start the upgrade process. Choose the Destination Directory. The system defaults to the c:\program files\Trams\cbplus\ directory. If you changed this during your initial installation, click on browse and select the proper destination folder. Next you are prompted to backup your current ClientBase exe's, press Yes, then *OK* to the default backup directory. The upgrade process begins and upon completion, you are prompted with a message "Your copy of ClientBase has been upgraded to Version x.xx.xx. This computer needs to reboot to complete the upgrade process." NOTE: With this upgrade, you must restart your workstation upon completion of the installation. Repeat these steps at each workstation. It is not necessary to rerun the ClientBase Database Update on the workstations.

****Please note**, if you chose not to install local copies of the ClientBase exe's on each workstation when you did your initial ClientBase installation, then Step Four can be skipped.



Train and Motivate Front-Line Agents on ClientBase



We at Trams 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 the in-house trainer take WebEx classes and listen to recorded trainings on the www.trams.com site to learn all about ClientBase features, setup, and how to train agents. Furthermore, the 5-step all-inclusive training program posted on the Trams website under Training|ClientBase|Getting Started 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

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

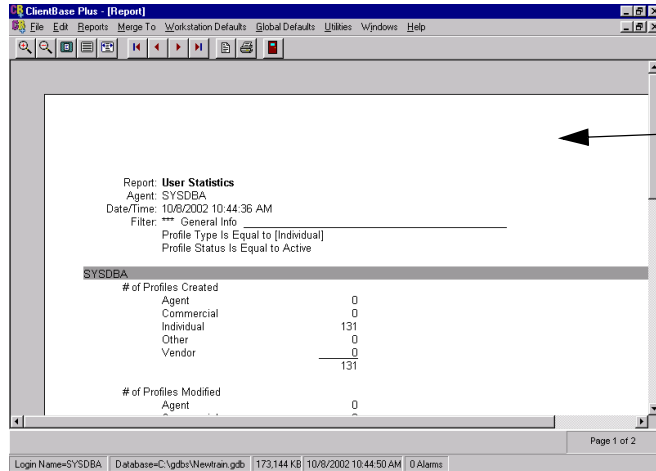
- 1. Overview** – Each training packet starts with a general overview of the skills that will be covered. Read this overview before starting each program.
- 2. Setup** – This section guides you through the process of setting up the area of ClientBase you need to utilize to train your agents.
- 3. Class 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.



Example: Mary, the agency manager, after attending class, holds a staff meeting introducing her agents to the ClientBase QuickStart Program. She has done all setup and preparation for Packet 1 and proceeds to follow the class outline to teach this concept. She has agents practice the concept using the agent handouts included in the course. Agents practice each new skill for 1-2 weeks, before beginning the next packet. Mary tracks agent

progress by using ClientBase reports outlined in the QuickStart manual. As agents learn each new skill, they slowly but surely learn how to use ClientBase.

Mary introduces her front-line agents to the ClientBase QuickStart Training Program found at [www.Trams.com/Training/ClientBase Getting Started](http://www.Trams.com/Training/ClientBaseGettingStarted).



As her agents learn a new skill, Mary tracks agents' progress by using ClientBase reports outlined in her program. If she sees one agent is not following through, she offers one-on-one help. She also thinks of ways to motivate agents as they practice each new habit.

Sample Reports:

- 1) **Quantity** - How many Profiles are being created/modified, and by whom? Query Profile Mod Date: From =-1,0,0 To =-1,0,0 - User Stats/Client Survey.
- 2) **Quality** - What fields are being missed when a Profile is created, and by whom? Query Profile Mod Date: From/To =-1,0,0 User Stats/Completed Field Stats.
- 3) **Tools for Measuring Agents' Progress** -
 - Why are agents not finishing reminders? Past Due Reminders (Activity Reports) Query Open Reminders To =-1,0,0 – Current Query Results or User Stats by Type.
 - How are Reminders being closed out? Closed Reminders (Activity Reports) Query Closed Reminders From/To =-1,0,0 and look at remarks.
 - How many new trips inquiries were made? By whom? Did agents set up reminder to follow-up on inquiry? New Trip Inquiry (Res Card Reports) Query Res Cards, Sales Cycle Under Consideration, From/To =-1,0,0 List or Agents Stats.
 - When a trip is booked, are reminders being set up for first deposit, final deposit, documents check, and Welcome Home? Query Res Cards, Sales Cycle Booked, From/To =-1,0,0 List.

For additional reports, refer to the ClientBase QuickStart Training Program.

Need help with training agents? Email training@trams.com.