

CLIENTBASE

Tip of the month

Efficiency rules! ClientBase is rich with functionality to assist with making every work hour a productive hour. Perhaps there are more features that you may not be aware of that can improve efficiencies? Tip of the month is a series designed to open new doors that could just make that work hour even more productive!

Problem:

Our agency database has several required and optional fields. When creating a profile, I don't see all of those fields until after I click apply or ok.

Solution:

In the latest release of ClientBase, we replaced the old method of creating new profiles with a new Quick Entry form. The Quick Entry form consists of two screens, one for the Profile and one for the Primary Traveler. All Required and Optional fields are displayed, along with the basics: Profile Type, Name and Address fields, Primary Phone, Interface ID, Primary Agent, and Branch. Required fields are indicated with a red asterisk. The required and optional fields are also listed on the right side, and as the user completes the entries, they disappear.

Profile

Type: Leisure

Last: _____ First: _____ Middle: _____ Courtesy Title: _____

Address Line 1: _____

Address Line 2: _____ Apt/Suite: _____

Zip Code: _____ City: _____ State: _____ Country: _____

Primary Phone: +52 (813) _____ Description: Home Phone

Primary E-mail: _____ Description: Email

Interface ID: _____ Primary Agent: _____ Branch No.: _____ Released By: _____

Marketing When:

Spring (March - May) Fall (September - Nov) Last Minute (books w/) Winter Break

Summer (June - Aug) Winter (December - Fe) Spring Break

More Fields:

Language: _____

Legend:

- * Required
 - Profile Primary Agent
 - Profile Released By
- Optional, but Recommended
 - Marketing When

Buttons: Cancel, Back, Next

Remember, if you have questions regarding this or any of our great features, join one of our daily Q&A's. Visit www.trams.com/home/training/ for more information.