

ClientBase Training List

LIVE WEBEX CLASSES

Here is a suggested order, topics and class level for our live *ClientBase* WebEx classes.

Note: It would be beneficial for the Database Administrator to attend the *ClientBase* Overview class to understand the program prior to any setup training with our Implementation specialists.

To enroll or join a class, use this link: <https://clientbase.webex.com/>

If you require assistance with setting up ClientBase or with our Quick Start Training Program, please contact: Trams.implementation@sabre.com

Implementation will contact you for basic setup. For more advance setup or assistance on any features including:

- Setting Up User Logins and Permissions
- Setting Up Global Defaults
- Dupe Check
- Global Modify
- Case Converter
- Backup/Restore
- Import Profiles from another source

Please contact

Our support deskSupport (Support@trams.com)

Or check out our Recorded sessions: (All Live Webex Classes are recorded)

http://www.trams.com/home/products_services/products/clientbase#recs

Or join one of our daily Q & A Sessions:

<https://clientbase.webex.com/>

CLIENTBASE DAILY Q & A SESSION

Daily opportunity to ask questions and discuss uses of the program (Windows version, but CBO & CBB users are welcome as well) in an open forum.

For All Users -No registration required – Join at any time during the hour

GETTING STARTED – THE BASICS

We recommend that all ClientBase users join our basics classes

1. CBW OVERVIEW

Beginning Level- Offered weekly, this session reviews the functionality, setup capabilities and the various benefits of ClientBase. It's ideal for new users to ClientBase.

2. BASICS: PROFILES, MERGE TO PNR AND MARKETING CODES

Beginning Level - Learn to use Profiles, Merge to PNR and Marketing Codes

3. BASICS: USING RES CARDS AND REMINDERS (PART 1)

Beginning Level -Basic Res Card Skills and Using Res Cards with Reminders to Follow Up on Trip Inquiry.

IN-DEPTH CLASSES FOR FRONT LINE AGENTS

1. ADVANCED PROFILES

Intermediate Level - In-depth look at building a client profile. Searching an existing profile, key fields with advanced features.

2. ACCESSING PROFILES AND MERGING TO A PNR IN THE SABRE RED WORKSPACE

Intermediate Level - Utility allows agents to use command line entries from the Sabre Red Workspace emulator to query CB profile info to move to PNR

3. USING RES CARDS (PART 2) FOR INVOICES, ITINERARIES & TRIP STATEMENTS

Intermediate Level- Attendee should have working knowledge of Res Cards or attended Using Res Cards (Part 1)

4. USING ACTIVITY MANAGER TO ORGANIZE YOUR DAY

Beginning/Intermediate Level - Attendee should be comfortable with the basic concepts of CB

5. USING TO COMMUNICATE WITH CUSTOMERS: MERGE TO DOCUMENT TEMPLATE, MERGE TO LABEL AND MERGE TO E-MAIL

Intermediate Level-The basics of Merge to Document Template, Merge to Label, Merge to Email

6. USING RES CARDS (PART 3) – ADVANCED SKILLS

Advanced Level - Attendee should have working knowledge of Res Cards or taken the Basics - Res Card Skills and Using Res Cards to Invoice class.

7. USING QUERIES TO INCREASE SALES ON THE AGENT LEVEL

Intermediate Level- Attendee should have working knowledge of the following basics: building profiles, merging to templates, labels. Provides a tool to help agents stimulate travel for their own clients.

8. USING LIVE CONNECT TO ARRANGE TRAVEL

Intermediate Level - Live Connect process including a demonstration of the booking and import process

9. INVENTORY MANAGER – USING INVENTORY MANAGER

Intermediate/Advanced Level - Review of utilizing the Inventory Manager. This class can be taken by any user involved in managing group Inventory.

MANAGEMENT/MARKETING TEAM

1. **USING REPORTS TO MANAGE, MARKET AND UNDERSTAND YOUR DATABASE**
Beginner/Intermediate Level - Attendees should have a working knowledge of CB profiles and query capabilities.
2. **QUERY AND PRINT LABELS AND LETTERS**
Beginner/Intermediate Level - Attendees should have a working knowledge of CB profile fields and knowledge of merging to Letters and Labels.
3. **USING BLAST EMAIL**
Intermediate/Advanced Level - Attendees should have working knowledge of CB profile fields and understanding of e-mail

SPECIALIZED CLASSES

NOTE: These classes have an alternate link to enroll and attend <https://tbo.webex.com>

1. **ENHANCED GROUP MANAGEMENT IN TRAMS BACK OFFICE AND CLIENTBASE**
Intermediate/Advanced Level - Learn how to setup groups in TBO and *ClientBase* geared to Bookkeeper/Manager/Group Specialist
2. **TRAMS/CLIENTBASE CRYSTAL REPORTS, ADDITIONAL TRAINING RESOURCES AND SOFTWARE UPDATES**
Intermediate/Advanced Level - Learn how to install the free Crystal Report Viewer and utilize Crystal Reports for *ClientBase* and *Trams*. Review the training resources that are available within *ClientBase* and *Trams*, as well as our website. Learn also how to confirm the agency's installed software version and access update files online.
3. **CLIENTBASE & TBO: AUTOMATE YOUR TRAMS PROCEDURES**
Intermediate/Advanced Level - Geared to Managers and Database Administrators

ADVANCED

1. **SETTING UP TO INVOICE FROM RES CARDS**
Intermediate/Advanced Level - Attendees should be familiar with issuing Invoices from Res Cards
2. **SETTING UP RES CARD DEFAULTS**
Intermediate/Advanced Level - Attendees should be familiar with Res Cards
3. **CUSTOMIZING RES CARD TRIP DOCUMENTS**
Intermediate/Advanced Level - Attendees should be familiar with Res Card trip documents
4. **SETTING UP LIVE CONNECT FOR AGENCY USE**
Intermediate/Advanced Level - Attendees should have an understanding of Live Connect