

ClientBase

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 basic agent classes to understand the program prior to participating in the Setup classes.

To enroll or join a class, use the following link:

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

If you require assistance with setting up ClientBase or with our Quick Start Training Program, please contact:

implementation@trams.com

For additional information 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
- ClientBase Online or ClientBase Browser

Please contact

Support (Support@trams.com)

Or check out our Recorded sessions:

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

No registration required – “Join” at any time during the hour
For all users

GETTING STARTED – THE BASICS

Geared to System Administrators, Management, Trainers, Frontline Agents

1) CBW OVERVIEW

Offered weekly, this session reviews the functionality, setup capabilities and the various benefits of ClientBase. This Overview provides a basis to determine agency focus and determine future classes to attend. It's ideal for new users to ClientBase.

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

Learn to use Profiles, Merge to PNR and Marketing Codes
"New user / beginner level"

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

Basic Res Card Skills and Using Res Cards with Reminders to Follow Up on Trip Inquiry
"New user / beginner level"

AGENCY DATABASE ADMINISTRATORS

1) SETTING UP TO INVOICE FROM RES CARDS

Attendees should be familiar with issuing Invoices from Res Cards
"Intermediate / advanced level"

2) SETTING UP RES CARD DEFAULTS

Attendees should be familiar with Res Cards
"Intermediate / advanced level"

3) CUSTOMIZING RES CARD TRIP DOCUMENTS

Attendees should be familiar with Res Card trip documents
"Intermediate / advanced level"

4) SETTING UP LIVE CONNECT FOR AGENCY USE

Attendees should have an understanding of Live Connect
"Intermediate / advanced level"

5) CLIENTBASE ENHANCEMENTS

Review of enhancements included in the latest release
Offered only after a new release
Geared to all users

FRONT LINE AGENTS IN-DEPTH CLASSES

1) ADVANCED PROFILES

In-depth look at building a client profile. Searching an existing profile, key fields with Advanced features.
" Intermediate level"

2) USING TO COMMUNICATE WITH CUSTOMERS: MERGE TO DOCUMENT TEMPLATE, MERGE TO LABEL AND MERGE TO E-MAIL

The basics of Merge to Document Template, Merge to Label, Merge to Email
"Intermediate level"

3) USING ACTIVITY MANAGER TO ORGANIZE YOUR DAY

Attendee should be comfortable with the basic concepts of CB
"Beginning / Intermediate level"

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

Attendee should have working knowledge of Res Cards or attended Using Res Cards and Reminders (Part 1)
"Intermediate level"

5) USING RES CARDS (PART 3) – ADVANCED SKILLS

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

6) USING QUERIES TO INCREASE SALES ON THE AGENT LEVEL

For the best results 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.
"Intermediate level"

7) USING LIVE CONNECT TO ARRANGE TRAVEL

Live Connect process including a demonstration of the booking and import process
"Intermediate level"

8) INVENTORY MANAGER – USING INVENTORY MANAGER

Review of utilizing the Inventory Manager.
This class has no definitive targeted group and can be taken by any user involved in managing group Inventory.
"Intermediate / advanced level"

MANAGEMENT/MARKETING TEAM

1) USING REPORTS TO MANAGE, MARKET AND UNDERSTAND YOUR DATABASE

Attendees should have a working knowledge of CB profiles and query capabilities.
"Beginner / intermediate level"

2) QUERY AND PRINT LABELS AND LETTERS

Attendees should have a working knowledge of CB profile fields and knowledge of Merging to Letters and Labels.
"Beginner / intermediate level"

3) USING BLAST EMAIL

Attendees should have working knowledge of CB profile fields and understanding of e-mail

"Intermediate / advanced level"

SPECIALIZED CLASSES

Please note that these classes have an alternate link to enroll and attend

<https://tbo.webex.com>

1) ENHANCED GROUP MANAGEMENT IN TRAMS BACK OFFICE AND CLIENTBASE

Learn how to setup groups in TBO and ClientBase

Geared to Bookkeeper/Manager/Group Specialist

"Intermediate / advanced level"

2) CLIENTBASE & TBO: AUTOMATE YOUR TRAMS PROCEDURES

Geared to Managers and Database Administrators

"Intermediate / advanced level"

3) TRAMS/CLIENTBASE CRYSTAL REPORTS, ADDITIONAL TRAINING RESOURCES AND SOFTWARE UPDATES

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.

"Intermediate / advanced level"