

## CLIENTBASE ONLINE AND CLIENTBASE BROWSER TRAINING LIST

### LIVE WEBEX CLASSES

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

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

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

For additional information or assistance on any features:

Check out our Recorded sessions:

[http://www.trams.com/home/products\\_services/products/clientbase\\_online/#recs](http://www.trams.com/home/products_services/products/clientbase_online/#recs)

Join one of our daily Q & A Sessions:

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

### CLIENTBASE ONLINE AND CLIENTBASE BROWSER

*For Frontline Agents using ClientBase Online or ClientBase Browser*

#### **1) GETTING STARTED WITH THE BASICS**

Overview of the basics of the ClientBase Online and ClientBase Browser versions  
"New user / beginner level of CBO/CBB"

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

Review of basic skills: Profile, Merge to PNR and Marketing Codes classes  
"New user / beginner level of CBO/CBB "

#### **3) BASICS: USING REMINDERS AND RES CARDS**

Review of basic skills: Reminders, Activity Manager and Res Cards  
"New user / beginner level of CBO/CBB "

#### **4) USING RES CARDS FOR INVOICES/ITINS /TRIP PROPOSAL**

Attendee should have working knowledge of Res Card or taken Using Reminders and Res Cards class.  
"Intermediate level of CBO/CBB"

## **CLIENTBASE ONLINE / CLIENTBASE BROWSER Q & A SESSION**

Opportunity to ask questions and discuss uses of CBO and CBB in an open forum

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

For all ClientBase Online and ClientBase Browser users

**CBO and CBB users are also welcome to attend the daily ClientBase Q&A.**

## **CLIENTBASE ONLINE**

### **CLIENTBASE ONLINE SETUP**

Review of setting up the features in ClientBase Online

"New user / beginner level of ClientBase Online