

Basic ClientBase Browser Invoicing

- 1) For every invoice interaction, find the client profile using the query field in CBB, put in few letters of the the client's last name and click *Refresh*. If no profile exists, create a new one.
- 2) Click *View* to enter the client profile. Make sure the profile contains the following info: accurate address, phone and email information.
- 3) Click the Family Member link and make sure anyone traveling today is entered, you only need to enter the First/Last Name to start. Add Family Member if appropriate.

The screenshot shows the ClientBase browser interface. At the top, it indicates 'SHARON is logged in.' and the 'ClientBase browser' logo. Below this are navigation tabs for 'Profile Manager', 'Activity Manager', and 'Res Card Manager'. There are also dropdown menus for 'Create Profile', 'Global Saved Queries', and 'Personal Saved Queries'. A toolbar contains icons for 'Merge to...', 'PNR', 'Live Connect', 'Res Card', 'Note', 'Mailer', 'Reminder', 'Tools', and 'Log Out'.

The main content area displays the profile for 'Kenneth Able' with the following details:

- Address:** 1255 Apple Street, Los Altos, CA 94022
- Phone:** +1 (310) 555-1234
- Fax:** (blank)
- E-mail:** kenable@yahoo.co
- Web:** (blank)
- Interface ID:** 4085140518
- Primary Agent:** Sharon Meyer
- Created:** 10/21/97
- Groups:** STANFORD ALUMNI
- Profile No.:** 384

Below the profile information, there is a 'Remarks' field containing the text: 'Call him Ken, met him at Travel show, wears funny ties }'. To the right of the profile is a vertical menu with options: 'Close Profile', 'General Info', 'Remarks', 'Marketing', 'Family Members' (circled in red), 'Activities', 'Cards', 'Res Cards', 'Travel History', 'Groups', 'Attachments', 'PNR Entries', and 'More Fields'.

At the bottom of the profile section, there are two buttons: 'Add Family Member' (circled in red) and 'Paste Family Member'. To the right of these buttons are links for 'Summary View' and 'Detail View'.

Below the buttons is a table listing family members:

	Name	First Name	Middle Init	Last Name	Relationship	Courtesy Title	Origin Count
View	Able/Jon	Jon		Able	Son		
View	Able/Kenneth	Kenneth		Able	Primary		
View	Able/Susan	Susan		Able	Wife		US

- 4) Click the Cards link and make sure any credit card or other card information is entered, with proper expiration dates. Edit or Add Card if appropriate.

CUSTOMER is logged in. **ClientBase** browser

Profile Manager Activity Manager Res Card Manager

- Create Profile - Global Saved Queries - Personal Saved Queries -

Merge to Doc Merge to E-mail PNR Live Connect Page History Log Out Help

Level 1 Query | Level 2 Query

Leisure - Able/Kenneth

Mr. And Mrs. Kenneth Able
546 State Street
Los Altos, CA 94022

Phone: +1 (650) 988-1345
Fax:
E-mail: ken@aol.com
Web:

Interface ID: 6509881223
Primary Agent: Sharon Meyer
Created: 10/21/97
Groups:
Profile No.: 384

Close Profile

- General Info
- Remarks
- Marketing
- Family Members
- Activities
- Cards**
- Res Cards
- Travel History
- Groups
- Attachments
- PNR Entries
- More Fields

Remarks: VIP Client

Add Card Summary View | Detail View

	CARDTYPE_LINKNO	CARDCODE	NUMBER	EXPDATE	NAMEONACCT	CARDDESCRIPT
Edit	Frequent Flyer	UA	5555555555		Susan Able	Mileage Plus
Edit	Frequent Flyer	AA	ntw6767		Ken Able	Advantage
Edit	Frequent Flyer	AA	4567999999		Susan Able	Advantage
Edit	Credit Card	VI	4111111111111111	12/31/08	Ken Able	Visa
Edit	Frequent Flyer	Carnival	CARN1234			
Edit	Frequent Flyer	HP	55667888		Ken Able	America West

- 5) Click the Res Card link to enter a new res card. Click Create a New Res Card and Res Card.

CUSTOMER is logged in. **ClientBase** browser

Profile Manager Activity Manager Res Card Manager

- Create Profile - Global Saved Queries - Personal Saved Queries -

Merge to Doc Merge to E-mail PNR Live Connect Page History Log Out Help

Level 1 Query | Level 2 Query

Leisure - Able/Kenneth

Mr. And Mrs. Kenneth Able
546 State Street
Los Altos, CA 94022

Phone: +1 (650) 988-1345
Fax:
E-mail: ken@aol.com
Web:

Interface ID: 6509881223
Primary Agent: Sharon Meyer
Created: 10/21/97
Groups:
Profile No.: 384

Close Profile

- General Info
- Remarks
- Marketing
- Family Members
- Activities
- Cards**
- Res Cards
- Travel History
- Groups
- Attachments
- PNR Entries
- More Fields

Remarks: VIP Client

- Create Res Card - Summary View | Detail View

Filters

All Res Cards Active Departed Cancelled

	Res Card No.	Status	Trip Locator	Trip Title	Create Date	Destination by
View	798	Active		example	8/14/07	

- 6) In new res card, choose appropriate Reservation Cycle (always use drop-downs if available), enter a meaningful Trip Name (so you can find card in profile or Res Card Manager), Region/Destination and in the agent remarks area type in any notes you want to remember (these don't print anywhere, they are just for you reference). Do NOT enter trip dates here. Click Save.

Save Cancel

Res Card

Agent
Sharon Meyer [- Select Agent -]

Create Date Branch Status
8/31/07 [0] Travel With The Stars Active

Reservation Cycle
3 Under Deposit -Reservation Cycle Sel-

Marketing Source
-Marketing Source-

Group
-Group Sel-

Region/Destination
Alaska -Region/Destination Sel-

Prepared for Trip Name Locator No.
[384] Able/Kenneth Alaska 0708

Trip Start Date Trip End Date

Ship to Address
Mr. And Mrs. Kenneth Able
546 State Street
Los Altos CA, 94022

Bill to Address
Mr. And Mrs. Kenneth Able
546 State Street
Los Altos CA, 94022

Agent Remarks
First Time Cruiser

- 7) Once saved, click on Passenger Link and Add Passengers one at a time. Make sure you see all passengers listed.

CUSTOMER is logged in. ClientBase browser

Profile Manager Activity Manager Res Card Manager

- Create Res Card - - Global Saved Queries - - Personal Saved Queries -

Generate Invoice Live Connect Page History Log Out Help

Level 1 Query | Level 2 Query

Res Card - Able/Kenneth

Res Card No.: 806
Res Total: 0.00
Invoiced Total: 0.00
Balance: 0.00

Agent: Sharon Meyer
 Status: Active
 Res. Cycle: 3 Under Deposit
 Trip Name: Alaska 0708

Trip Start Date:
 Trip End Date:

Passengers

Close Res Card
 General Info
 Invoice
 Passengers
 Reservations
 Activities
 Itinerary Report
 Attachments
 More Fields

Add Passenger

	Name	Last Name	First Name	Type	Primary
Edit	Able/Ken	Able	Ken	Adult	N
Edit	Able/Susan	Able	Susan	Adult	N

- 8) Click on Reservation Link and Add Reservation to enter reservation details. Select the Reservation Type from drop-down.

CUSTOMER is logged in. ClientBase browser

Profile Manager Activity Manager Res Card Manager

- Create Res Card - - Global Saved Queries - - Personal Saved Queries -

Generate Invoice Live Connect Page History Log Out Help

Level 1 Query | Level 2 Query

Res Card - Able/Kenneth

Res Card No.: 806
Res Total: 0.00
Invoiced Total: 0.00
Balance: 0.00

Agent: Sharon Meyer
 Status: Active
 Res. Cycle: 3 Under Deposit
 Trip Name: Alaska 0708

Trip Start Date:
 Trip End Date:

Reservations

Close Res Card
 General Info
 Invoice
 Passengers
 Reservations
 Activities
 Itinerary Report
 Attachments
 More Fields

- Add Reservation -
 - Add Reservation -
 Air
 Hotel
 Car
 Cruise
 Insurance
 Miscellaneous
 Rail
 Tour
 Service Fee
 Transportation

- 9) Type in a few letters of vendor's name, tab, & choose from drop-down. Enter confirmation #, pricing, and any other details & Save. (If you enter a deposit or final payment due date, these will create reminders upon saving when you click Create Reminders.)

Cruise Live Connect

Date Reserved: 8/31/07 Booking Status: Confirmed Promo ID:

Vendor: Princess Cruise Lines [- Select Vendor -]

Confirmation Number: 12345 Record Locator:

Booking Method: [- Booking Method -]

Reservation Status: [- Reservation Status -]

Duration: No. of Pax: 2 No. of Cabins: 1

Issued Outside CB+: No Issued through ARC: No

Domestic/International:

Passengers

Able/Ken
 Able/Susan

Charge As: Per Cabin

	Base	Tax		Commission	
Total:	1300.00	130.00	10.00 %	400.00	0.00 %

Payment Due Date

Deposit Due Date: Final Payment Due Date: 12/15/2007

Itin/Invoice Remarks

10) After saving, scroll down to bottom of webpage until you get to Service Provider area and click View and Edit. We are going to add more info to your reservation. Type in the Ship Name (this can be free-flow), the dates of travel, Category and any other info you want to put on invoice. Click Save and Close Service Provider.

Res Card - Able/Kenneth

Cruise Service Provider

Res Card No.: 806	Agent: Sharon Meyer	Trip Start Date:
Res Total: 1,430.00	Status: Active	Trip End Date:
Invoiced Total: 0.00	Res. Cycle: 3 Under Deposit	
Balance: 1,430.00	Trip Name: Alaska 0708	

Fare: 1,430.00	Base: 1,300.00	Tax: 130.00	Com: 400.00	Net Fare: 1,030.00
Start Date:	End Date:			

Save Delete Cancel

Cruise

Ship

Start Date ... End Date ...

Category Deck Cabin/Room

Dining

Smoking

Description

Passengers

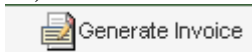
- Able/Ken
- Able/Susan

Itin/Invoice Remarks

- 11) On next screen click Create Reminder so that the final payment will appear on your To-Do list in the Activity Manager to handle. Click Proceed and Close Reservation. If you need to add another Reservation, follow the instructions above to repeat.

Cruise						Live Connect	Inventory	Edit
Booking Status: Confirmed			Reservation Status:					
Vendor: Princess Cruise Lines			Promo ID:					
Date Reserved: 08/31/2007			Duration:					
Confirmation #: 12345			No of PAX: 2					
Record Locator:			No of Cabins: 1					
Booking Method:			Invoice Outside CB+: No					
Domestic/International:			Issued through ARC: No					
Passengers								
Able/Ken								
Able/Susan								
Charge As: Per Cabin								Itemize
Base	Tax		Com		Total Fare			
\$1,300.00	\$130.00	10.00%	\$400.00	0.00%	\$1,430.00			
Tax								Edit
Tax 1: \$0.00 0.00%								
Tax 2: \$0.00 0.00%								
Tax 3: \$0.00 0.00%								
Tax 4: \$0.00 0.00%								
Payment Due Date							Create Reminders	
Deposit Due Date:								
Final Payment Due Date: 12/15/2007								
Itin/Invoice Remarks								
Agent Remarks								
Service Provider						- Add Service Provider -		
		Type	Start Date	End Date	Service Provider	Code		
View	Edit	Cruise	7/1/08	7/10/08	Crown Princess	PRINCESS		

- 12) Click the Generate Invoice Button on toolbar at top of screen:



- 13) Select any remarks you want to appear on bottom of invoice by clicking Remarks, enter a Trip Balance Due Date if applicable, choose the Form of Payment and pick cc# from

drop-down, and in the This Invoice area, put amount of this invoice. Make sure to put the correct Submit To/Travel Type and preview.

Cancel Preview Generate Invoice

Issue Date
08/17/2007

Canned Remarks are here.

Remarks
Trip Balance Due Date
09/30/2007

Invoice Payment
 Form of Payment: Credit Card | Check / CC Number: 4111111111111111 | -Select Credit Card-

Category: Cruise

Vendor: Carnival Cruise Line

Passenger: Able/Ken;Able/Susan;

Confirmation No: 12345

Depart Date:

Return Date:

Pass Name:

Start Ticket No:

End Ticket No:

Agent: Sharon Meyer

1.0	✓	Base	Tax	Comm	Total Fare
Total		1,800.00	180.00	180.00	1,980.00
Sale					
Not Invoiced		1,800.00	180.00	180.00	1,980.00
This Invoice		500.00	0.00	0.00	500.00

Submit to: Supplier

Travel Type: Ship-Dpet

Agent: Sharon Meyer

Use Inside Rate

Use Outside Rate

Booking Payment
 Form of Payment: Credit Card | Check / CC Number: 4111111111111111 | -Select Credit Card-

Cancel Preview Generate Invoice

- 14) If the amounts don't look right in preview, return to reservation and correct. Otherwise click *Generate Invoice* to issue the invoice. The invoice will launch into an Adobe Acrobat Reader and can be emailed, saved on your computer for emailing, or printed out. The invoice now resides in the Invoice link in the res card where it can be reprinted or emailed to customer as long as your program is setup with SMTP email

settings:

https://cbb-asp.trams.com/demo/print_invoice?invoiceno=1392&type=inline - Microsoft Internet Explorer Provided by Sabre Inc.


File Edit View Favorites Tools Help

Back Links Address https://cbb-asp.trams.com/demo/print_invoice?invoiceno=1392&type=inline Go

Save a Copy Print Email Search Review & Comment Sign

Select Text 117%

Travel with The Stars



Invoice No. : 100328
Invoice Date : 8/17/2007
Travel Consultant : Sharon Meyer
Group No. :
Page No. : 1

Mr. And Mrs. Kenneth Able
546 State Street
Los Altos CA, 94022

Cruise Reservation

Vendor	: Carnival Cruise Line	Confirmation No.	: 12345
Booking Status	: Confirmed	No. of Passengers	: 2
Passengers	: Able/Ken; Able/Susan;		

Remarks go here that appear on invoice.

8.5 x 11 in