ClientBase Browser QuickStart

Training Program

Getting ClientBase Browser Up and Running is as easy as 1, 2, 3, 4, 5 . . .

Corporate Office: 310.641.8726
Support: 310.641.8726, Press 2
Support Fax: 800.288.8728
E-mail: *support@trams.com*

ClientBase Browser Version Implementation Checklist

Thank you for choosing ClientBase Browser Version as your Customer Relationship Management program. **Two *important factors to understand about ClientBase Browser Version is that all the setup is done in ClientBase Windows Version, and that the ClientBase Browser screens and features are considerably different than the Windows version.*** We strongly recommend that you get training on the Windows version of ClientBase, so you understand how to use this in conjunction with ClientBase Browser Version, and also train on ClientBase Browser Version in order to successfully utilize the available features.

We have laid out a checklist to identify the transitional items that you need to address. After reviewing this outline, e-mail any questions to Quickstart@trams.com.

___1. Load Software. For assistance from our Support Desk, e-mail support@trams.com. (If you are using Hosted ClientBase Browser, some one will be calling for set up.) If you have not used ClientBase Windows Version, this must be setup FIRST.

___2. Select an In-House Trainer if your agency is unfamiliar with the ClientBase Windows Version, and schedule her/him for a 2-day Training class at one of our 3 training centers. To enroll, e-mail Training@trams.com.

___3. The In-House Trainer attends on-line *ClientBase Overview* class before attending 2-day training if not familiar with this program. Class is scheduled every Monday at 11:00 a.m. PST and can be accessed at http://tramsevents.webex.com/ .

___4. In-House Trainer attends on-line *ClientBase Browser classes* at http://www.trams.com/training/cbpWebex.thtml#cbb *.*
OR
In-House Trainer listens to *ClientBase Browser Recorded Trainings at http://www.trams.com/training/cbbCBI.thtml* .

___5. Database Administrator works with TRAMS Implementation Team who will be contacting your agency to set up ClientBase for use by ClientBase Browser users including importing existing customer information.

___7. Create an office training program. Utilize the ClientBase Browser QuickStart Training Program.

___8. Have agents attend the *ClientBase Browser* WebEx session entitled *Getting Started with the Basics* at http://tramsevents.webex.com/.
OR

ClientBase Browser Recorded Trainings at http://www.trams.com/training/cbbCBI.thtml

OR BOTH!

___ 9. Review and set up in ClientBase Windows Version for *Learning Basic Profile Skills* using Packet 1.

___10. Train agents using Packet 1, *Learning Basic Profile Skills*. Monitor progress and "mastering" of skill before moving on to next skill.

___11. If applicable, have agents set up Merge to PNR on their workstations using setup instructions contained in Packet 2, *Learning Merge to PNR,* of ClientBase Browser Version QuickStart Training

Program. Review and set up in ClientBase Windows the Merge to PNR Rules using setup instructions contained in Packet 2, *Learning Merge to PNR.*

___12. If applicable, train agents using Packet 2, *Learning Merge to PNR.* Monitor progress and "mastering" of skill before moving on to next skill.

___13. Review and set up Marketing Tables and Codes in ClientBase Windows Version by using setup instructions contained in Packet 3, *Updating Marketing Codes,* of ClientBase QuickStart Training Program.

___14. Train agents using Packet 3, *Updating Marketing Codes.* Monitor progress and "mastering" of skill before moving on to next skill.

___15. Review and set up Reminders and Res Cards in ClientBase Windows Version by using setup instructions contained in Packet 4, *Getting Started with Reminders and Res Cards*. Use Recorded Trainings on our website or attend WebEx specialized courses to learn how to do this.

___16. Train agents using Packet 4, *Getting Started with Reminders and Res Cards*, of ClientBase Browser Version QuickStart Training Program. Monitor progress and "mastering" of skill before moving on to next skill.

___17. Review and set up Res Cards in ClientBase Windows Version by using setup instructions contained in Packet 5, *Enhanced Res Card Skills,* of ClientBase QuickStart Training Program. Use Recorded Trainings on our website or attend WebEx specialized courses to learn how to do this.

___18. Train agents using Packet 5, *Enhanced Res Card Skills*. Monitor progress and "mastering" of skill.

___19. In-house Trainer attends setup WebEx Class for Invoicing, Itineraries and Trip Statements and implement.

___20. Agents and In-House Trainer attend WebEx classes on Res Card use.

___21. In-house Trainer attends setup and usage WebEx Classes for Live Connect.

___22. In-House Trainer trains agents on Live Connect.

___23. All continue to attend WebEx Weekly CBB Q&A on Fridays at 8:30 a.m. PST.

Congratulations! You've taken the necessary steps to start gaining all the benefits ClientBase Browser Version has to offer! Please do not hesitate to contact us should you need any additional assistance at Quickstart@trams.com.

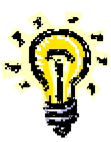
ClientBase Browser Version QuickStart Training Program

We at TRAMS feel strongly that the easiest and fastest way to get ClientBase Browser Version up and running is to assign an In-House Trainer to implement the program. We suggest the In-House Trainer attend a 2-day, hands-on session at any of our three training centers to learn all about ClientBase Windows Version features, setup, and how to train agents. Furthermore, the enclosed 5-step all-inclusive training program is designed to help the In-House Trainer with training agents. It consists of 5 basic ClientBase concepts:

Packet One:	**Learning Basic Profile Skills**
Packet Two:	**Learning Merge to PNR**
Packet Three:	**Updating Marketing Codes**
Packet Four:	**Getting Started with Reminders and Res Cards**
Packet Five:	**Enhanced Res Card Skills**

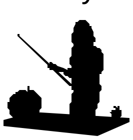
How Does the In-House Trainer Begin?

The following steps outline how to use each of the 5 training packets:

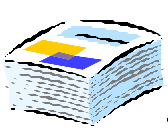


1. Overview – Each training packet starts with a general overview of the skills that will be covered. Read this overview before starting each program.

2. Setup – All setup for ClientBase Browser Version is done in ClientBase Windows Version except for Packet Two: Learning Merge to PNR. Complete directions on set up are contained the ClientBase Windows Version QuickStart Training Program that came in the startup kit you received when you signed up to use ClientBase.



3. Class Outline – To help you train your agents on each skill, a class outline of the material to review is included.



4. Monitor Results/Additional Resources – This is probably the most important part of the training program. The only way to ensure your agents "get it" is to track results. Progress reports you can run in ClientBase Windows Version and additional resources for your training and that of your agents are found at the back of this guide.

Packet One: Learning Basic Profile Skills

GOAL:

Teach agents basic concept of profiles and uses.

Overview

In many agencies client information is stored in too many different locations. With ClientBase, you now have a tool that centralizes all client data into a single location, and makes that information accessible to everyone via a client profile.

In this first packet, **Learning Basic Profile Skills**, you are teaching the agents to master the following Profile skills:

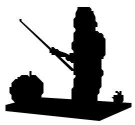
- ☐ **How to launch ClientBase Browser and toggle between other programs.**
- ☐ **How to begin doing Level 1 Lookup (Query) using a *Query* Folder.**
- ☐ **Start a new profile.**
- ☐ **Update existing profiles.**
- ☐ **Complete key profile fields:**
  - **First Name**
  - **Last Name**
  - **Courtesy Title**
  - **Primary Address**
  - **Primary Phones/E-mails**
  - **Interface ID (if agency requires)**
  - **Salutation**
  - **Family Members (Names, Credit Cards, Frequent Flyer Numbers)**
- ☐ **How to use Travel History to view past client travel.**

Packet One: Learning Basic Profile Skills

ClientBase Browser Version QuickStart

Profile Skills Class Outline

GOAL:
Teach agents ClientBase basic profile skills.



Class Outline

After set up in ClientBase Windows Version, you are ready to hold a staff meeting. (**Important!** Please have your agents attend the 1-hour live WebEx class ClientBase Browser Class, *Getting Started with the Basics* at www.trams.com as a prerequisite to this training session; or make sure they have listened to the recordings on ClientBase Browser.)

☐ **Brief introduction from Owner or Manager**: What is ClientBase and why is it important to us as an agency? This is a pep talk, buy-in, demonstrating enthusiasm for the program. **(3-5 Minutes)**

☐ **In-House Trainer Intro:** How does ClientBase benefit agents? **(3 Minutes)**

- Helps me organize my daily routine
- Instead of having client info in lots of places, I can now access it from just one place
- Helps me remember more about my clients
- Helps me qualify my clients
- Everyone knows which clients are mine
- Easier for others to help my clients
- Service my clients better
- Saves me time
- Makes it possible for agency to market effectively and drive profitable business in through the doors
- My agency thrives

☐ **In-House Trainer Discussion:** How do I log into ClientBase Browser and toggle between multiple applications? **(2 Minutes)**

☐ **In-House Trainer Discussion:** What is a profile? **(3 Minutes)**
In today's marketplace travel agents are finding a need to shift their

focus away from just being order takers and processing transactions. A profile is a folder that contains all traveler information.

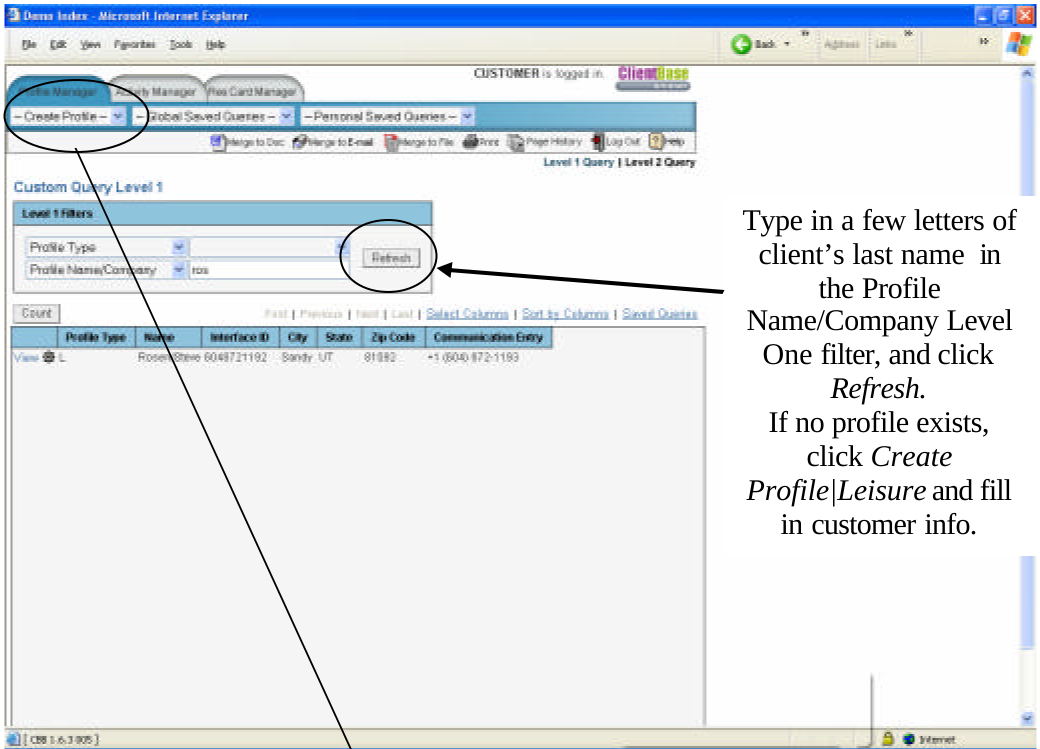
☐ **In-House Trainer Demonstration:** How to look up a profile using Level 1 Query folder, and update profile fields. Bonus: Click on Travel History tab to view what travel client has done in past if agency has TRAMS Back Office! **(2 Minutes)**

☐ **In-House Trainer Demonstration:** How to create a new profile, complete fields and review concept of drop-down fields set by the agency**. (12 Minutes)**

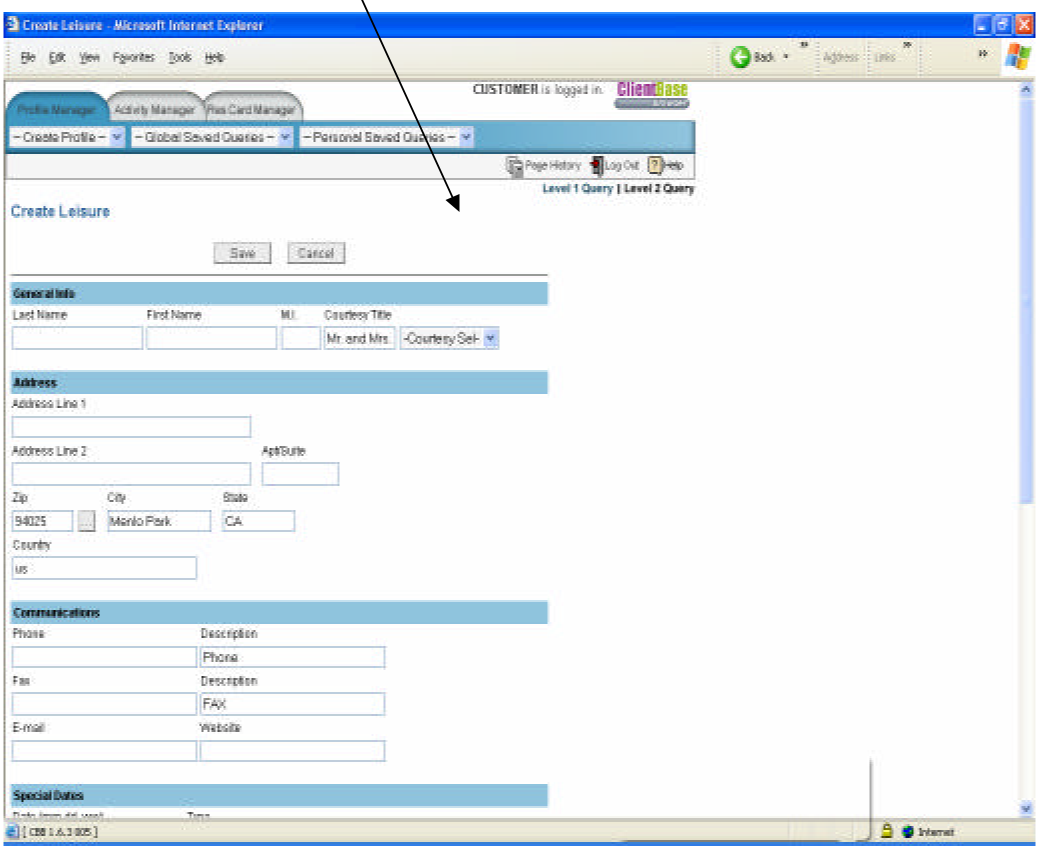
- First Name
- Last Name
- Courtesy Title
- Primary Address
- Primary Phones/E-mails
- Interface ID **(if agency requires; auto-fill field or how to use if not an auto-fill field)**
- Salutation
- Family Members (Legal Names, Credit Card Numbers, and Frequent Flyer Numbers)

☐ **In-House Trainer Demonstration:** *How to Save Entered Information and Navigate in the Browser*. **(1 Minute)**

☐ **Q & A Session. (Cap at 5 Minutes)**



Type in a few letters of client's last name in the Profile Name/Company Level One filter, and click *Refresh.*
If no profile exists, click *Create Profile|Leisure* and fill in customer info.



Packet Two: Learning Merge to PNR

ClientBase Browser Version QuickStart

PNR Skills Overview

GOAL:

Teach agents basic concept of Merge to PNR.

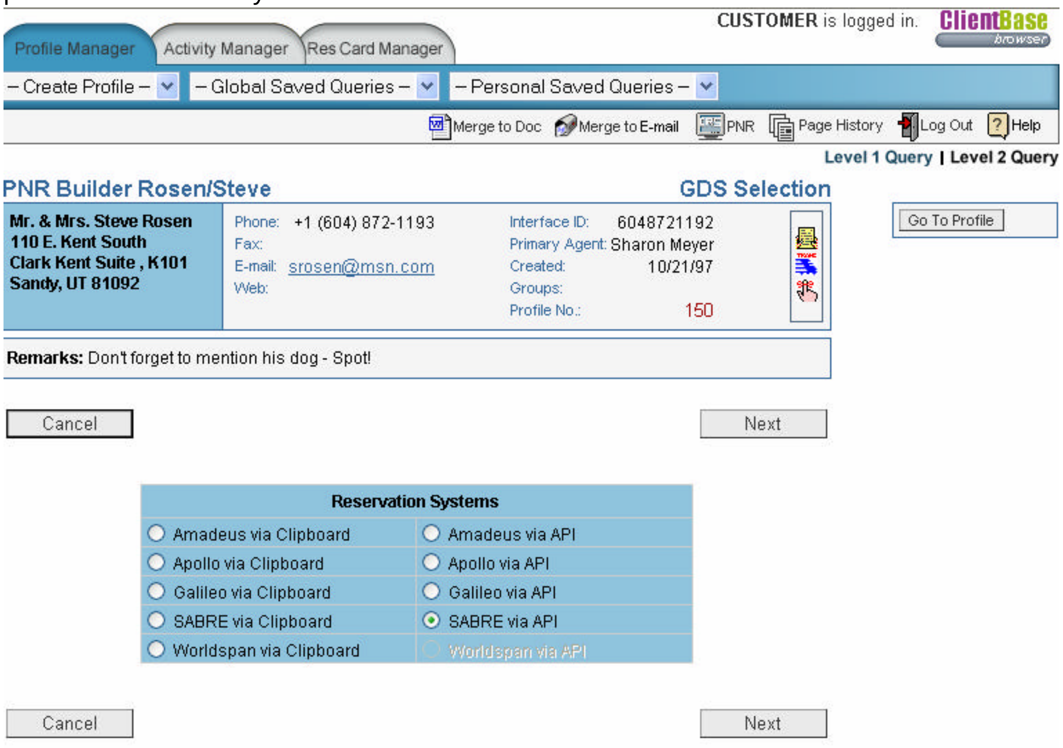
Overview

You will discover that your database grows rapidly once your agents are trained on the practical applications of ClientBase Browser Version. Using Merge to PNR provides an everyday tool that demonstrates the value of the program to your agents. In this second packet, **Learning Merge to PNR**, you are teaching the agents to master the following associated skills. (Important: Users need to set up their own workstations for use with this feature as outlined on next page.)

- ☐ **How to toggle back and forth between the GDS and ClientBase Browser.**
- ☐ **How to initiate the Merge to PNR process using one of two methods.**
  - Start in the GDS by checking availability and booking flights. Toggle into ClientBase Browser Version, display or build a new profile and merge customer data to the PNR.
  - Start in ClientBase Browser Version and search for profile. Display or build a new profile and merge data to PNR. Toggle into GDS to check availability and book flights.
- ☐ **How to use the Merge to PNR Feature.**
  - **Selection Screen**
    - How to use Merge to PNR *Selection Screen*
    - Click *Preview* or *Finish*
  - **PNR Preview Screen**
    - Update in GDS format
    - *Finish*
- ☐ **How to toggle and review merged data in PNR.**

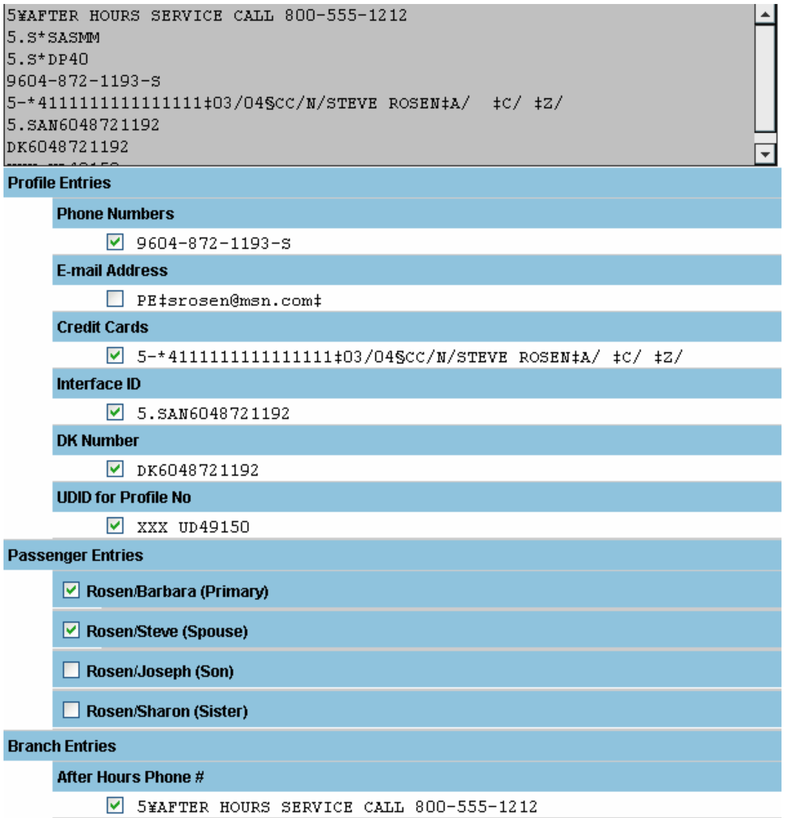
Set Up and Use of Merge to PNR

Step 1) First time users will select the platform to use to send profile information to the GDS, and download the platform applet. The very first time you use the Merge to the PNR feature, a screen appears from which to pick this platform one time only:



Unless you are using Worldspan or Sabre WebTop which use the Windows Clipboard, you are using an API (Application Protocol Interface). Select the appropriate platform and click *Next.* For users selecting an API platform, an applet is downloaded on your computer so that PNR data can integrate with your workstation. **Important Note:** Make sure to check off *Always trust content from TRAMS, Inc.* That way you won't see this dialog every time you do a Merge to PNR. In the future whenever you delete cookies or files from your Internet Explorer, you will be asked again to download this applet.

Step 2) After you have downloaded the applet (for API platform users only), you are prompted with a series of check boxes in the PNR Builder Selection Screen. The gray area recaps (previews) entries which have been setup by the database administrator to always move into the PNR. Select the information you want to move to a PNR by scrolling down and checking or unchecking any optional entries. Click *Cancel* to abort the Merge to PNR process, *Refresh* to see an edited version of the gray recap screen at the top of the selection screen, or *Preview.*



Step 3) Clicking *Preview* takes you to a PNR screen where you can edit and get a full-page preview of any entries you have approved. The screen displays all information in the exact format that it will land into your current PNR. Information on this screen can be modified, but does not permanently update your ClientBase profile.

Step 4) Pressing *Finish* does the following depending on your GDS:

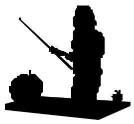
Sabre for Windows, MySabre, Amadeus Plus Scripts (APS), Vista, and Apollo/Galileo Users: When clicking *Finish*, the previewed information is pasted into your current PNR. If this occurs successfully, a confirming message appears. Use your normal Windows command (<Alt+Tab>) to toggle into your GDS, hit *Display All* and view the updated PNR.

Special Note to Amadeus Users: Amadeus has 3 platforms - APS (which stands for Amadeus Pro Software), Vista, and ProWeb. The Amadeus tool we use for Merge to PNR and PNR Import is called Amadeus +Script and is available with both APS and Vista platforms. (If the agency's APS or Vista platform did not come with this +Script tool activated, then contact the Amadeus support desk to turn it on. Amadeus has agreed to waive a fees associated with +Scripts for all TRAMS customers, so there is no cost, just a phone call to the support desk.)

Special Note to MySabre Users: In order to integrate with ClientBase, TA Sharing needs to be enabled which is a simple setting in the MySabre configuration. There is no cost for this and agency should contact Sabre support desk for assistance on setting this up. Also, use your mouse to toggle between open PNR and ClientBase **NOT** <Alt><Tab>.

Worldspan and Sabre Webtop Users: When pressing *Finish*, the previewed information is placed in the Windows clipboard. If this occurs successfully, a confirming message appears. Use the normal Windows command (<Alt+Tab>) to toggle into your GDS, retrieve or display the appropriate PNR, and paste what was placed in the clipboard using either <Ctrl+V>, <Shift+Insert>, or Edit/ Paste, then press Enter to transmit the entries, and Display All to view the updated PNR.

GOAL:
Teach agents how to Merge to PNR.



Class Outline

You are ready to hold a staff meeting.

☐ **In-House Trainer Review: How to edit/create Profiles. (3 minutes)**
Quick review of key applicable fields such as Bill To/Ship To addresses, communication entries, traveler names, credit cards, frequent flyer #'s, etc.

☐ **In-House Trainer Intro: Why use Merge to PNR and how does this benefit the agency and agents? (2 minutes)**

- Saves me time when I create a PNR for clients who don't have a GDS profile.
- Adds details to the PNR in much the same way as a GDS profile would.
- With every profile built, the agency's marketing database has been verified/updated. This is the key to successful marketing programs.
- All client details are merged in a uniform, standardized format, regardless of the agent.
- If the agency has multiple reservation systems, only one profile needs to be maintained and data is converted to the applicable GDS formats.
- More efficient for accounting (TRAMS Back Office) if PNR is started in ClientBase Browser Version, as the back office Interface ID is automatically sent to PNR.

☐ **In-House Trainer Discussion: How do I toggle between open PNR and ClientBase Browser? What are two methods to use *Merge to PNR*? (4 minutes)**

- Start by checking availability in the GDS. Toggle into ClientBase Browser Version and search for an existing profile. If found, verify data is current and accurate. If none found, create a new one. Merge to PNR.
- Search for an existing profile in ClientBase Browser Version. If found, verify data is current and accurate. If none found, create a new one. Merge to PNR. Toggle back to GDS and check availability.

☐ **In-House Trainer Demonstration: Step-by-step how to *Merge to PNR*. (8 minutes)**

- Search for profile either prior to doing availability in GDS, or after.
- Verify client data and that a Bill To/Ship To address exists.
- Merge to PNR.
- Review Selection Screen. Select and unselect as desired.
- Review *PNR Preview Screen*, explaining how to make changes.
- *Finish* and explain process of clipboard or API.

☐ **In-House Trainer Demo**: How to navigate back to GDS to review merged data, check for errors, and display PNR. **(2 minutes)**

☐ **Q & A Session. (Cap 5 minutes)**

☐ **In-House Trainer Sets Expectations:** Expectation is that all PNRs will now be created from ClientBase Browser Version. (**1 minute)**

Packet Three: Updating Marketing Codes

Marketing Codes Skills Overview

GOAL:

Teach agents how to update marketing codes.

Overview

Tracking your clients' travel preferences is simple when a checklist of marketing codes is available to select from. The Marketing Tab in the ClientBase profile makes it easy for agents to check off client demographics and preferences. These codes can then be used for future marketing and to help agents qualify clients for new trips.

In this third packet, **Updating Marketing Codes**, you are teaching the agents to master the following skills:

- ☐ **To update client profiles with Marketing Codes which reflect travel interests.**

- ☐ **Profile Marketing Link**
    - o Scroll up and down
    - o Add/delete codes by clicking *Edit.*

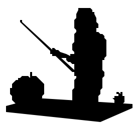
- ☐ **Using Marketing Codes to qualify clients**

Packet Three: Updating Marketing Codes

Marketing Codes Class Outline

GOAL:

Teach agents how to get started with Updating Marketing Codes.



Class Outline

After setup in ClientBase Windows Version, you are ready to hold a staff meeting.

☐ **In-House Trainer Intro: How does Updating Marketing Codes in ClientBase Browser Version benefit agents? (2 minutes)**

- Helps agents to qualify clients
- Agency can perform target marketing to get right product to the right customers
- Agents can do target marketing to their own clients
- Agents can be pro-active with their own client lists to stimulate travel

☐ **In-House Trainer Discussion: Review the Marketing Link. (5 minutes)**

- Scroll up and down
- Click *Edit* to add/delete codes (explaining life cycle of a client and how these codes change)

☐ **In-House Trainer Discussion: Review of Marketing Categories and Codes. (5 minutes)**

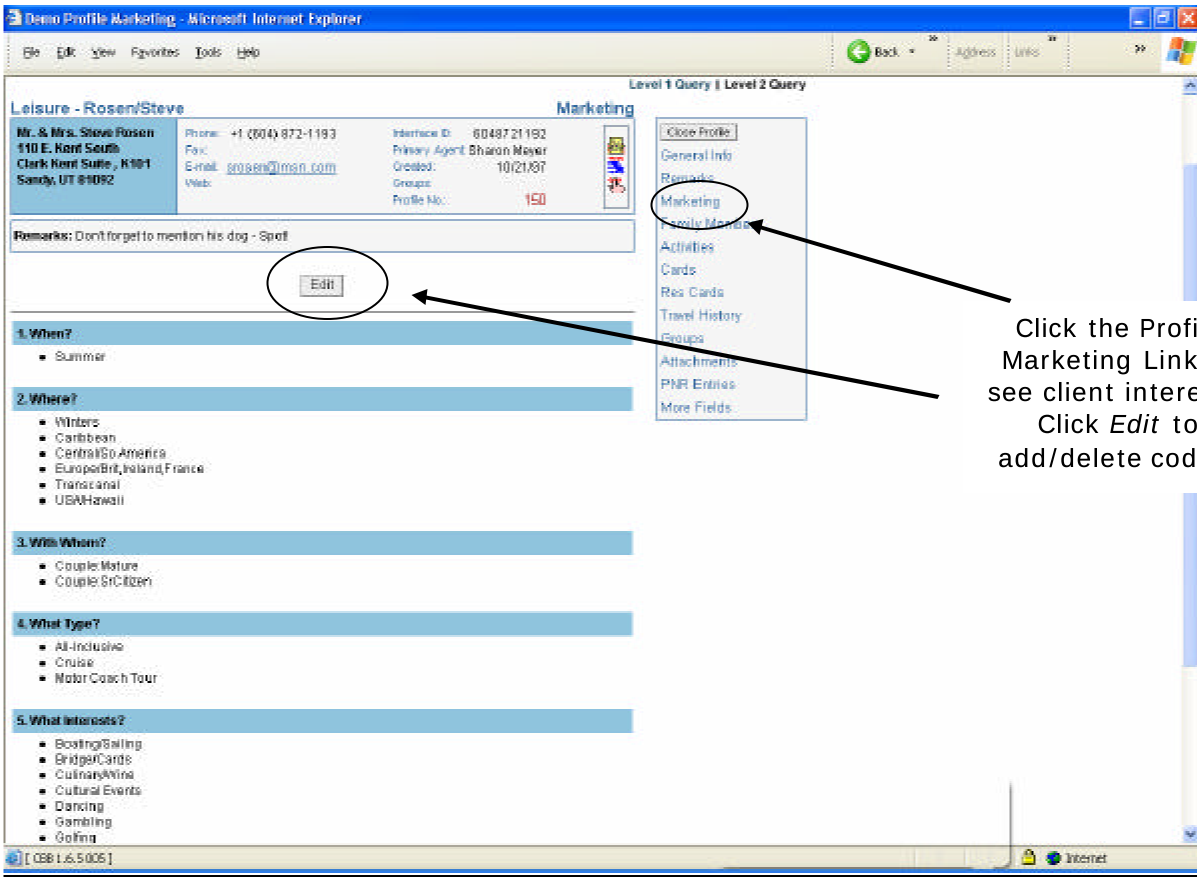
- Review and define any codes that might be open to interpretation
- Ask for suggestions from agents on what codes they feel are missing

☐ **In-House Trainer Discussion: Populating Marketing Tab by talking with Client: (8 minutes)**

- During sales process
- During Welcome Home call
    - Listen during a conversation with a client, take notes, update profile

☐ **Q & A Session. (Cap at 5 minutes)**

☐ **In-House Trainer Sets Expectations:** Whenever an agent has contact with a customer and picks up on an interest while booking a trip, doing a welcome home call, or just in general conversation, agent checks off marketing code in Profile Marketing Link. **(2 minutes)**

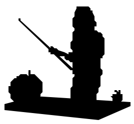


Click the Profile Marketing Link to see client interests. Click *Edit* to add/delete codes.

Packet Four: Getting Started with Reminders & Res Cards

GOAL:

Teach agents how to create and use Reminders & Res Cards.



Class Outline

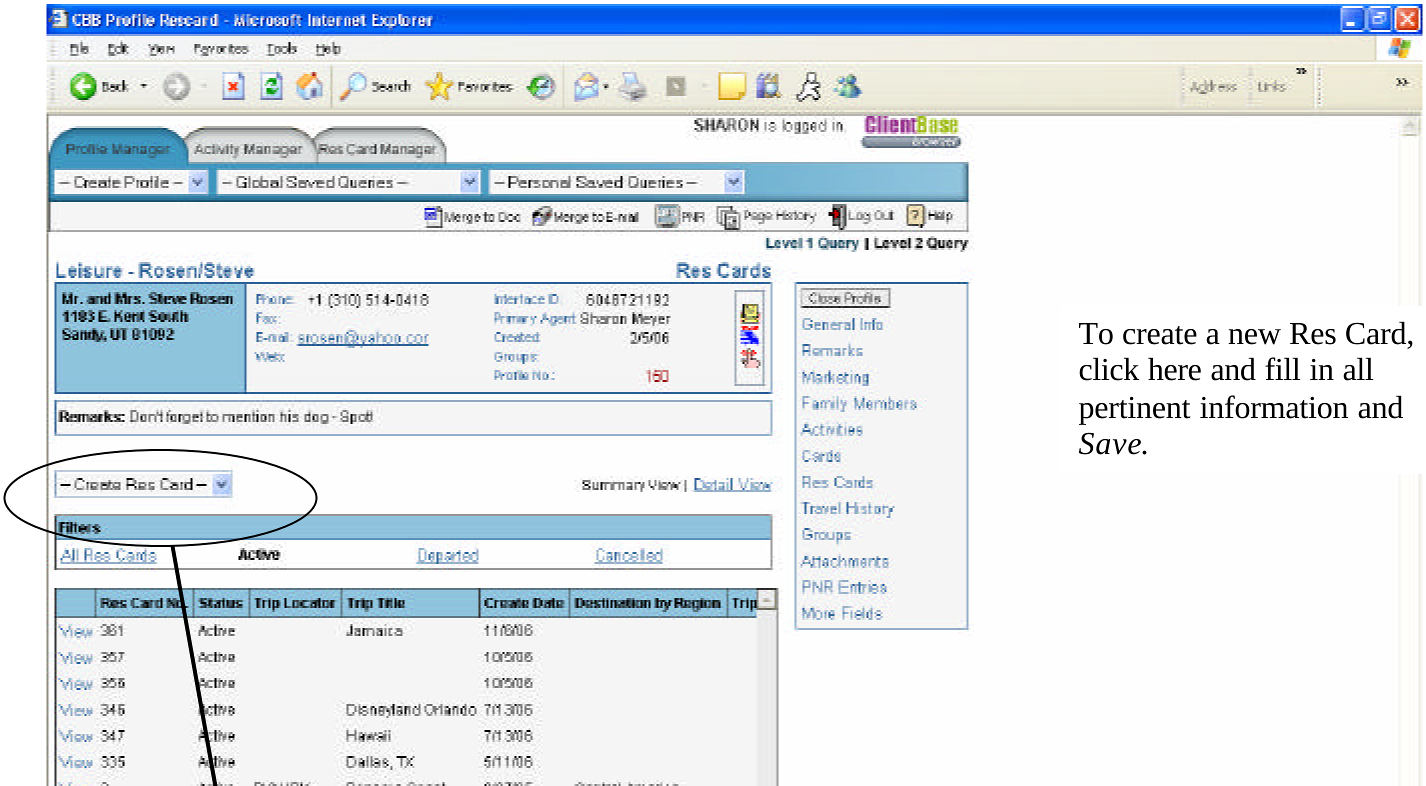
After set up in ClientBase Windows Version, you are ready to hold a staff meeting.

☐ **In-House Trainer Intro: How do Res Card Reminders benefit agents? (2 minutes)**

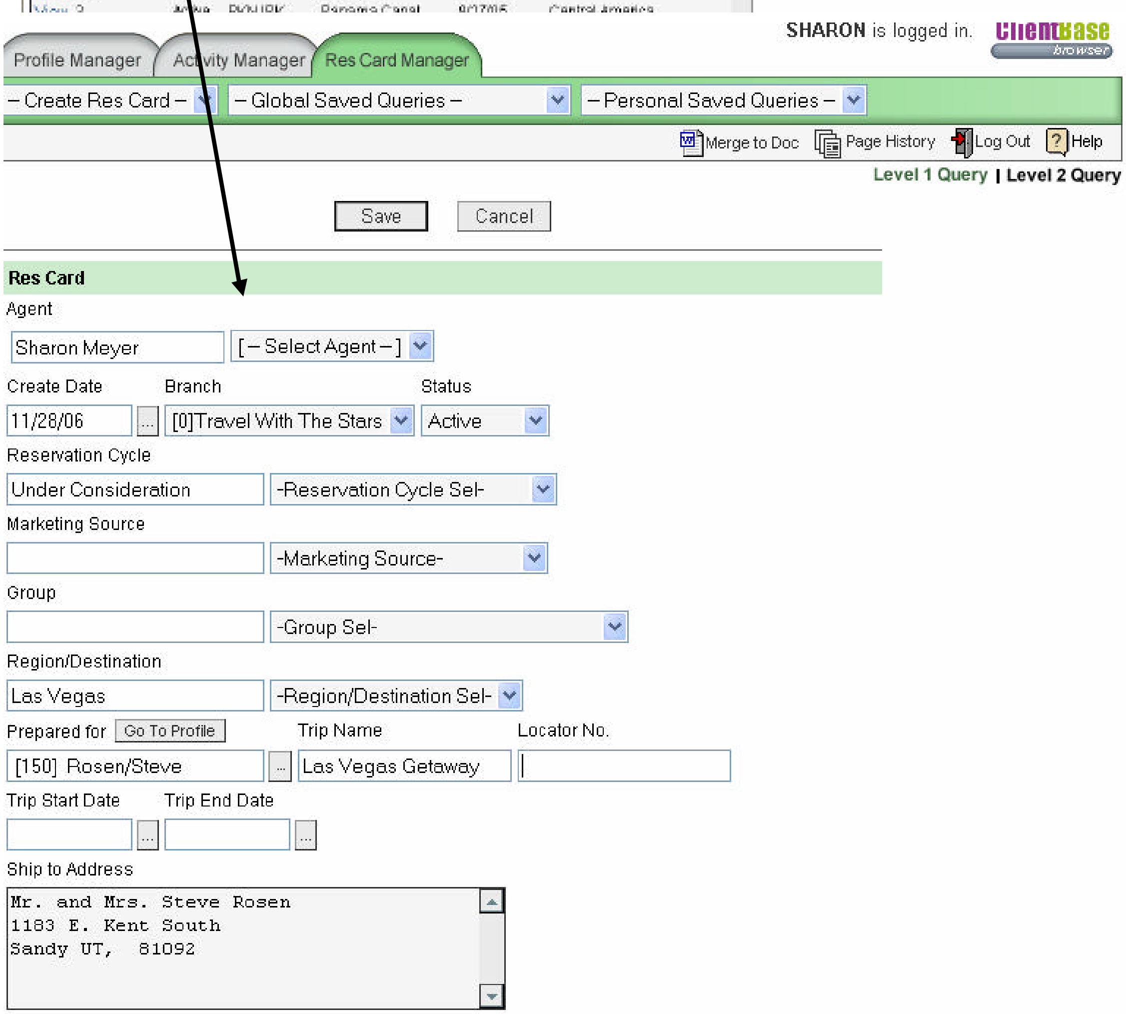
- Helps me organize my daily routine.
- Helps me manage the sales process: I'll get alerted when it's time to follow-up on that sales inquiry.
- Helps my agency determine how many new trips are inquired about on a daily, weekly, monthly basis, and how many of these trip inquiries turn into actual bookings.
- All details about a particular trip are kept in one place.

☐ **In-House Trainer Demonstration: How to create Reminders in conjunction with Res Card. With every trip inquiry (non-ARC), an agent creates a basic Res Card. What is a Res Card? (5 -8 minutes)**

- Search for Profile
- Update/Create Profile if none exists
- Create Res Card
- Add Agent name if not defaulted
- *Status* "Active" defaults
- Select *Reservation Cycle* "Under Consideration"
- Give trip a name
- Identify region
- *S*ave Res Card and stay in

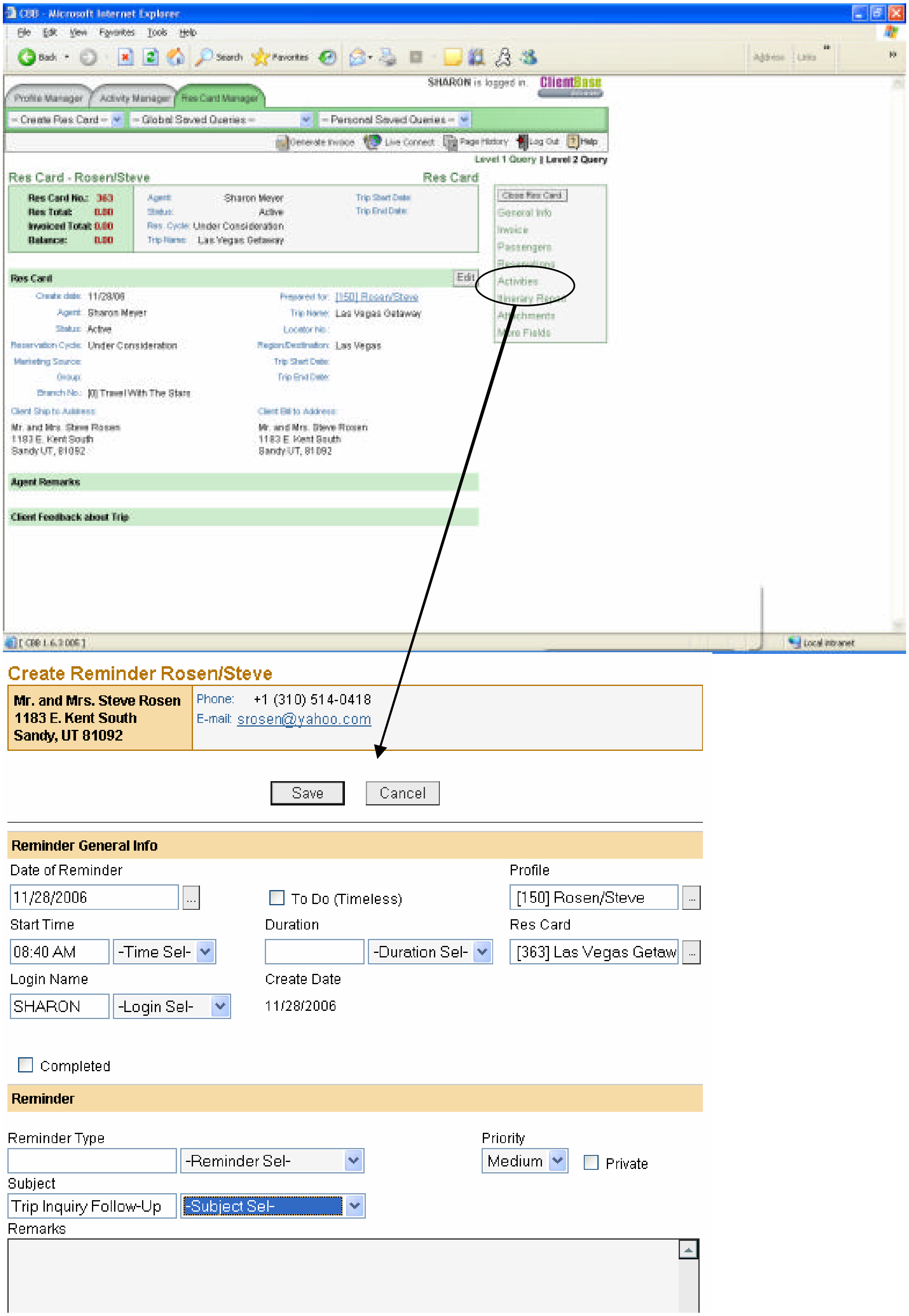


To create a new Res Card, click here and fill in all pertinent information and *Save.*



☐ **In-House Trainer Demonstration -** How to create a Reminder in the Res Card Activity link for trip follow-up: **(6 minutes)**

- Set a follow-up date
- Explain dated and timed activity vs. to-do timeless
- Review screen details
- Select *Trip Inquiry Follow-up* as subject from drop-down



- ☐ **In-House Trainer Demonstration -** Show how to find all activities in the activity link of customer profile. (**2 minutes)**

- ☐ **In-House Trainer Demonstration –** How to work off a *To-Do* List daily in the Activity Manager. Either closing the *Reminder* by rescheduling it, or using the *Completed* field to take of list after it is refreshed. **(3 minutes)**

- ☐ **Q & A Session (Cap at 5 minutes)**

- ☐ **In-House Trainer Sets Expectations:** Expectation is that with all new trip inquiries, agents will create a new Res Card a *Trip Inquiry Follow Up* Reminder. **(2 minutes)**

Packet Five: Enhanced Res Cards Skills

ClientBase Browser Version QuickStart

Res Card Skills Overview

GOAL:
Teach agents how to enhance their Res Card skills.

Overview

Now that your agents have been introduced to the ClientBase Res Card to manage the sales process, it's time to expand the use of the Res Card for tracking the reservation details once a booking is made, and to use other Reminders to manage the trip planning process. In this fifth packet, **Enhanced Res Cards Skills**, you are teaching the agents to master the following skills:

☐ **How to find Res Cards they have created**

- Moving between Reminders and the Res Card
- Retrieving Res Cards from the Client Profile or from the Res Card Manager

☐ **Review General Info Section**

- Auto-fill fields: Create Date, Agent, Status
- How to change *Reservation Cycle* to *Booked*
- Bill To and Ship To Addresses

☐ **Key Additional Fields in Res Card**

- Group
- Regions
- Passenger Name – Insert from Profile, and add other travelers

☐ **How to Create New Reservation and input Vendor, trip pricing, and trip dates**

☐ **How to use Reminders to manage the trip planning process.**

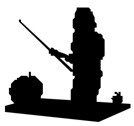
Packet Five: Enhanced Res Cards Skills

ClientBase Browser Version QuickStart

Res Cards Class Outline

GOAL:

Teach agents additional Res Card skills.



Class Outline

After set up in ClientBase Windows Version, you are ready to hold a staff meeting.

☐ **In-House Trainer Review:** What is a Res Card and how does using Res Cards benefit agents? **(3 minutes)**

- Manages sale from start to finish
- Easily create Reminders all at once for all the things you need to track
- Provides valuable trip details in one place
- Management and owners can get valuable reports on trips
- Res Cards enable you to use Live Connect Providers
- Saves time by typing details into Res Cards instead of writing them on paper and transferring them
- Invoices from Res Cards fall directly into TRAMS Back Office

☐ **In-House Trainer Demonstration:** How to retrieve previous created Res Cards. **(3 minutes)**

- From Profile's Res Card Link
- From Res Card Manager

☐ **In-House Trainer Demonstration: General Info Res Card Section (3 minutes)**

- Change *Reservation Cycle* from *Under Consideration* to *Booked.*
- Show *Page History* to go to Profile and to hop back into Res Card
- Explain Bill to and Ship To Addresses, Regions, Group
- Add passengers – Insert from Profile, and add other travelers

☐ **In-House Trainer Demonstration –** Create a new reservation and input vendor, trip pricing, and trip dates. **(3 minutes)**

- ☐ **In-House Trainer Demonstration -** Click Reminders to set up all reminders for the trip. Show how to save and check in Activity Tab for all reminders created. (**3 minutes)**

- ☐ **Q & A Session (Cap at 5 minutes)**

- ☐ **In-House Trainer Sets Expectations (for Agent accountability):** Agents are to setup a Res Card for each new trip and create a reminder for *Trip Inquiry Follow-up.* When client books trip, agent will query up the Res Card, fill in key Res Card information such as passengers, vendor, trip pricing and dates, and created reminders for Deposit, Final Payment, Check for Documents, and Welcome Home call. **(3 minutes)**

Agency Operations Reports Run in ClientBase Windows Version

Daily

- ***Review Profile Quantity (Profile Reports)***
  - → Level 2 Query Profile Modified Date: From =-1,0,0 To =-1,0,0
  - → Go to **Reports|Statistics|User Stats**

- ***Review Profile Quality (Profile Reports)***
  - → Level 2 Query Profile Modified Date: From =-1,0,0 To =-1,0,0
  - → Go to **Reports|Profile Reports|Statistics|Completed Field Statistics** (if you have not setup Required Fields profile fields, this is a way to see if these fields are being completed by each agent)
  - → Go to **Reports|Profile Reports|List|Detailed or 3 Line summary.** Check that each profile has marketing data, review the profiles for missing data.
  - → Click *Columns,* add *Create by Agent* and/or *Primary Agent* plus any specific fields you are interested in viewing.
  - → Go to **Reports|Profile Reports|Current Query Results** to print out a "What you see is what you get report."

- ***Past Due Reminders (Activity Reports)***
  - → Level 1 Query Open Reminders Date: From = (Leave Blank) To =-1,0,0 and Agent Field blank.
  - → Go to **Reports|Statistics|User Stats** and sort by **Type**
  - → Click *Columns*, and add *Create by Agent* plus any specific fields you are interested in viewing (Activity Remarks)
  - → Go to **Reports|Activity Reports|Current Query Results** or **Reports|Activity Reports|List|Detail**

- ***New Trip Inquiries (Activity)***
  - → Level 2 Activity Query, Check Reminders, Create Date: From =-1,0,0 To =-1,0,0, with Subject *New Trip Inquiry Follow-up*
  - → Go to **Reports|Activity Reports|List in Summary or Detail,** or **Reports|Activity Reports|Statistics|User Stats**

- ***New Trip Inquiries (Res Card Reports)***
  - → Level 2 Query Res Cards with Sales Cycle *Under Consideration* From =-1,0,0 To =-1,0,0
  - → Go to **Reports|Res Card Reports|Res Cycle Report** sorted by Agent
  - → Level 2 Query Res Cards, Active Status From=-1,0,0 TO=-1,0,0
  - → Go to **Reports|Res Card Reports|Statistics** and sort by *Reservation Cycle.*

Weekly

- **Welcome New Customers (Profile Reports)**
  - → Level 2 Query Profile Create Date: From =Mon To =0,0,0
  - → Go to **Reports|Profile Reports|Client Survey.** Print to include with *Welcome to the Agency* letter

- **Publish Weekly Statistics (Profile Reports)**
  - → Level 2 Query Profile Modified Date: From =Mon To =0,0,0
  - → Go to **Reports|Profile Reports|Statistics|User Stats**

- **Review Completed Reminders (Activity Reports)**
  - → Level 2 Query Reminders Completed From =Mon To =0,0,0
  - → Go to **Reports|Activity Reports|Statistics|User Stats** sort by Subject
  - → View results of completed reminders by going to **Reports|Activity Reports|Lists|Detail**

- **Review Activities Created (Activity Reports)**
  - → Level 1 Query All Notes, Mailers, Reminders, From =Mon To =0,0,0 and Login Name blank
  - → Go to **Reports|Activity Reports|Statistics|User Stats** sorted by Type or Subject

- **Welcome Home Customers (Activity Report)**
  - → Level 2 Activity Query Open Reminders From =Mon To =0,0,0 with Subject *Welcome Home*
  - → Go to **Reports|Activity Reports|Statistics|User Stats** to check if agents are creating reminders

- **Review Bookings Not Paid Yet (Res Card Reports)**
  - → Level 2 Res Card, Deposit Due From =Mon To =0,0,0 and Invoiced = No
  - → Go to **Reports|Res Card Reports|Current Query Results**
  - → Go to **Reports|Res Card Reports|Vendor Booking Report** to review vendors booked to see if any non-preferred vendors have been booked.

Monthly Routine

- **New Customer Analysis (Profile Reports/Res Card Reports)**
  - → Where did they come from? (Level 2 Query Create Date From=1,-1,0 To=31,-1,0
  - → Go to **Reports|Profile Reports|Statistics|Referred by Stats**
  - → Did they book anything? (Level 2 Res Card Query Create Date From=1,-1,0 To =31,-1,0
  - → Go to **Reports|Res Card Reports|Reservation Cycle**

- → Did we get Surveys? Was data updated? (Level 2 Query Profile Create Date From=1,-1,0 To =31,-1,0 and and Survey Received customized More Field or Marketing Code
- → Go to **Reports|Profile Reports|List|3 Line Summary**

- **Current Customer Analysis (Profile Reports)**
  - → Where are the niches? Query All Leisure Clients and go to **Reports|Profile Reports|Statistics|Marketing Code Stats**
  - → ***What are upcoming birthdays? Level 2 Query in Family Member|Employee tab, and put in present Month in FROM/TO dates. Make sure columns selected are Passenger Last Name and First Name. Go to **Reports|Profile Reports|Lists or Reports|Profile Reports|Current Query Results**
  - → ***Special Dates - query All Clients and go to **Reports|Profile Reports|Statistics|Special Date Stats**

***** Check out enhanced Birthday and Special Reports on our website at **www.trams.com, Products|TRAMS Crystal Reports.**

- **Marketing Activity Analysis (Activity Reports)**
  - → Query All Marketing Activities for month and go to **Reports|Activity Reports|Activity Stats** sorted all ways
  - → Query all Mailers for month with response date to see how successful were mailings for the month
  - → Go to **Reports|Activity Reports|Lists|Summary**

- **Res Card Analysis (Res Card Reports)**
  - → Query all Res Cards for month and go to **Reports|Res Card Reports|Reservation Card Cycle** (What cycle are they in and are there any cancellations?)
  - → Go to **Reports|Res Card Reports Final Payment Report**
  - → Go to **Reports|Res Card Reports Vendor/Service Provider** (What vendors or service providers are they booking? What are destination/vendor trends?)
  - → Query *Source of Booking* using the Mailer name, and go to **Reports|Res Card Reports|Client Booking Reports.**