ClientBase Online



Commission Tracking

This guide will outline the steps to track commissions in ClientBase Online by creating a Reminder for tracking, searching for the Reminder, sending a file to the Host (if applicable) for follow-up and marking the Reminders closed once commission has been received.

Add Commission Due to User Defined Field 'Reminder Type'

1.

Go to Tools > Settings > User Defined Fields.

ClientBase Online Jul Dashboard L profil	LES 🗮 ACTIVITIES 🏥 RES CARDS	X - 0 - ₽
	🚊 — Global Saved Sea	Page History
		Settings
		Mask Credit Card Number
A		Import Profile
Agency Settings		X
		My Login
Global Defaults	Set Up	Audit Reports
Profile Defaults	Agent and Agency Set Up	About
Default Field Values for New Profiles	Branch Settings	
Profile More Fields	User Logins	
Marketing Categories	Login Security Settings	
Marketing Codes	Agency Live Connect Logins	
Communications	Live Connect Provider Setup	
Membership ID Fields	Merge to PNR Settings	
Auto-Case Converter - Profile/Traveler	Merge to PNR Rules	
Res Card Defaults	Group List	
Default Field Values For Res Cards	Workflow and Document Set	Up
Res Card More Fields	Forms	
Insurance Promoting	Required/Optional Fields	
Tax and Commission	User Defined Fields	
Default Field Values For New Invoices	Documents	
Batched Reminders	Header and Footer - Invoices	
Host Codes	Header and Footer - Trip Proposals	
	Document Templates	
	Reports Client Survey Report Settings	
	Prompts Enable/Disable Reminder Alarms	

2. Click on the Field drop down. Move down and select Reminder Type.

ETURN TO AGENCY SETTINGS	Agency Settings User Defined Fields		
eld:	ADD MODIFY DELETE	Meal Service Profile More Field Items Referred By Reminder Type Res Card More Field Items Res Card: Bedding	2

- 3. Select Add.
- 4. Add Commission Due as the field name. Select Save.

Field: Reminder Type					
		Allow "Free	Flow"		
	Reminder Type Appointment Email Mail/FAX Phone Call Task	ADD MODIFY	Reminder Type Appointment Email Mail/FAX Phone Call Task Commisison Due	Allow "Free Flow"	We strongly suggest you uncheck Allow "Free Flow" for data consistancy.

Create a Reminder for Commission Tracking

1. In the Res Card, select **Reminders > Create Single Reminder** OR click on the **Activities link** and select **Create Activity** > **Reminder**.

Merge Options 👻		Generate Invoice Trip Propos	al PNR Live Connect	Note Mailer	Reminders 🔫
Res Card - Young/P	Patrick			act	Create Single Reminder
Currency Trip Tot Res Card Totals 9 Invoiced Total: 1 Balance: 8	AlUSD AlUSD ,716.00 ,000.00 ,716.00 Trip Start Date: 03/09/20 Trip End Date: 03/23/20	3		Act	Create Batched Reminder
About this trip:	Activities			- Create Activity - Reminder	
Travelers	Filters			Mailer Batched Reminders	5
Reservations Invoices Itinerary Report Activities Attachments More Fields X Close Res Card	All Activities Mailers	Notes	Reminders	Open Rem	maers

- 2. Fill in the following fields:
 - a. Date of Reminder = First day of the month the commission is expected in
 - b. **Reminder Type** = Commission Due
 - c. **Subject** = Vendor, Amount Due, Invoice Number, Host/Vendor who is paying the commission, Return Date

Reminder General Info								
Date of Reminder				Profile				- L
04/01/2020	12	Reminder						
		Reminder Type				Priority		
To Do (Timeless)	(Commission Due	-Reminder Sel-	\checkmark		Med		\checkmark
	_	Subject						
		DLV; 358.23; Inv 23459; 23Mar20	>	I	-Subject Sel-		\checkmark	

Search for Commission Due Reminders

1. In the Activity Manager, select **Go To Advanced Search**.

ClientBase Online	ul DASHBOARD			RES CARDS			*	;- (• 6
Activities		/		– Globa	al Saved Searc	hes – 🔽	Person	al Saved S	earches – 🗸
Merge Options 😽				Create New:	Profile 👻	Res Card	Note	Mailer	Reminder
All Activities									
Find Activities by									
Login Name	Select All Notes,	Reminders, and Ma	il 🔽						
From Date	To Date	12							
Q FIND (RESET	GO TO ADVANCE	ED SEARCH							

- 2. Fill in the following fields:
 - a. Activity Type = Reminders
 - b. Select Not Completed/Responded from the drop down
 - c. Activity date:
 - i. Leave the beginning date blank. By leaving this field blank, the results will include all prior reminders.
 - ii. Use the date formula =31,-1,0 to search for Reminders through the prior month. For example, if you run the search in June, the results will include all Reminders through May.
 - d. Reminder type = Commission Due
 - e. Select OK.

	⊘ OK < CANCEL (RESET
Activity	Activity Type
Profile	Reminders
	Not Completed/Not Responded
	Activity Date
	From
	12 through =31,-1,0
3	Activity Details
	Login Name Create User
	Priority
	Private
	Reminder Type
	Commission DueReminder Type

3. Click on Select Columns.

*** Jorin	ition								
Reminders	(Not Comp	leted/Not Responded)							
Activity D	ate Less	than or Equal to "=31,	-1,0" [2/29/2	020]					
Reminder T	ype Start	s With "Commission Due	e"						~
					First Previous Ne	exter Select Columns	ort by Columns	Saved S	earches
/ COUNT	Туре	Login/Created Name	Name	Activity DateTime	First Previous Ne Subject	Reminder/Mailer Type	ort by Columns	Saved S	earches Comp

- 4. Select the following fields to appear in Fields to Columns. NOTE: You may need to select fields from Fields Available and move them to Fields in Columns (using the blue arrow). And there may be Fields in Columns that you may need to move to Fields Available. They do not need to be in any specific order. **a. PROFILE: Name**
 - b. ACTIVITY: Reminder/Mailer Type
 - c. ACTIVITY: Subject
 - d. ACTDATETIME: Activity DateTime
 - e. RES CARD: Trip Name 5. Select OK.



Save the Search

1. Once the search is complete, select Saved Searches.

leted/Not Responded)								
than or Found to "=31								
man of squar to of,	Activity Date Less than or Equal to "=31,-1,0" [2/29/2020]							
s With "Commission Due	277						~	
			First Previous Ne	ext Select Columns So	rt by Columns	Saved S	Searc	
Login/Created Name	Name	Activity DateTime	Subject	Reminder/Mailer Type	Duration	To Do	C	
	CH BY BACK TO	CH BY BACK TO SIMPLE SEARC	CH BY BACK TO SIMPLE SEARCH	CH BY BACK TO SIMPLE SEARCH FIRST Previous Net	GH BY BACK TO SIMPLE SEARCH ▶ First Previous Next Select Columns So	GH BY BACK TO SIMPLE SEARCH > First Previous Next Select Columns Sort by Columns	GH BY BACK TO SIMPLE SEARCH > First Previous Next Select Columns Sort by Columns Saved S	

2. Select Save Current.

		SAVE CURRENT		
Global Saved Searches				
All Activities	View	Replace with Current Search	Rename	Delete
All Mailers	View	Replace with Current Search	Rename	Delete

- 3. From the drop down, select **Personal** or **Global**.
 - a. Personal is a search available to whomever is logged in creating the search
 - b. Global is a search available to anyone
- 4. Select OK.

Activity View Save As					
Personal Global	-				
Name	-				
Commission Due					
		Ок	CANCEL		

5. This search is now available in the search drop down.

ClientBase Online	aul DASHBOARD	ACTIVITIES	🛍 RES CARDS		* - ? - ₽
Activities				Global Saved Searches 🔽	- Personal Saved Searches - Agent / Activity Date Beth's Open Reminders Commission Due Open Reminders Only Uncomoleted
		CAVE OUDDENT			

Merge to File

1. Select Merge Options > Merge to File.

ClientBase Online	e .ul dashboar	d 💄 profi	LES 🛱 ACTIVITIES	💼 RES CARDS			*	- ?	• 🗗
Activities				.	Global Saved Searc	thes – 🔽	Persona	al Saved S	earches – 🔽
Merge Options 👻	-			Create	New: Profile v	Res Card	Note	Mailer	Reminder
Merge To File	-								
Merge To Printer									
Merge To Label Y									
Reminders (Not Complete Activity Date Less that Reminder Type Starts W	ed/Not Responded) n or Equal to "=31,- ith "Commission Due"	1,0" [2/29/202	0]						
ENTER DATA TO SEARCH	BY BACK TO SI	MPLE SEARCH	•						
				First Previous	I Next Select Col	umns Sort I	by Columns	s Saved	I Searches
Type L	ogin/Created Name	Name	Activity Date Time S	ıbject	Reminder/Ma	iler Type	Duration	To Do	Comp
View 💭 R BE	TH	Young/Patrick 2	/1/20 4:15 PM DLV	/; 358.23; Inv 23459; 23M	1ar20 Commission D	ue 1	5	N	

2. Enter a File Name. Select Export.

File Name	Feb Comm Due ×	
✓ Include	e Field Name	
Ascii File	а Туре	
Comm	a delimited	
🔿 Tab de	elimited	
Results t	to Merge	
All Res	sults in Current Manager	
	ad Deputte in Current Manager	

3. Select **Save** to save the file to your computer or select **Open** to view the file.



eb+comm+bue.csv	clientbaseonline.com			
	Open	Save	•	Cancel

4. The file will open in Excel.

. A	A	В	C	D	E	F
1	Name (PROFILE)	Reminder/Mailer Type (ACTIVITY)	Subject (ACTIVITY)	Trip Name (RESCARD)	Activity DateTime (ACTDATETIME)	
2	Young/Patrick	Commission Due	PCL \$587, Inv 34898, Host, 04Jun15	Anniversary Cruise 2016	6/1/2015 14:30	
3						
4						

Mark Reminders Completed

When commission has been paid, it is important to mark the Reminder completed. By marking the Reminder completed, it will not appear on any future searches.

- 1. Run the **Saved Search** you created above.
- 2. Click on the 'gear' to the left of the name and select Edit.



- 3. Move down to find the Completed field. Enter a check mark to mark the Reminder completed.
- 4. Enter notes in Remarks (optional).

BEIH	-Login Sel-	03/09/2020		
Complete	Completion Date			
Update E E-mails will b	E-mail Calendar after Saving Changes be sent to your address: beth.vollmar@s	sabre.com (You can change your e-mail address on the My Login page.)		
Reminder				
Reminder Ty	ре	Priority		
Commission	n Due -Reminder Sel- 🔽	Med 🔽 🗌 Private		
Subject				
DLV; 358.23	3; Inv 23459; 23Mar20	-Subject Sel-		
Remarks				
Comm received, \$358.23, 4/20/20				