

ClientBase Online Setup for the End User



Setup Order

Step 1. Preparing a Computer

Step 2. Branch Setup

Step 3. Create an Agent Profile & Link to Branch

Step 4. Create User Login Step 5. PNR Setup for Sabre, Amadeus, Worldspan, Galileo and Apollo

Step 5. PNR Setup for Sabre, Amadeus, Worldspan, Galileo and Apollo

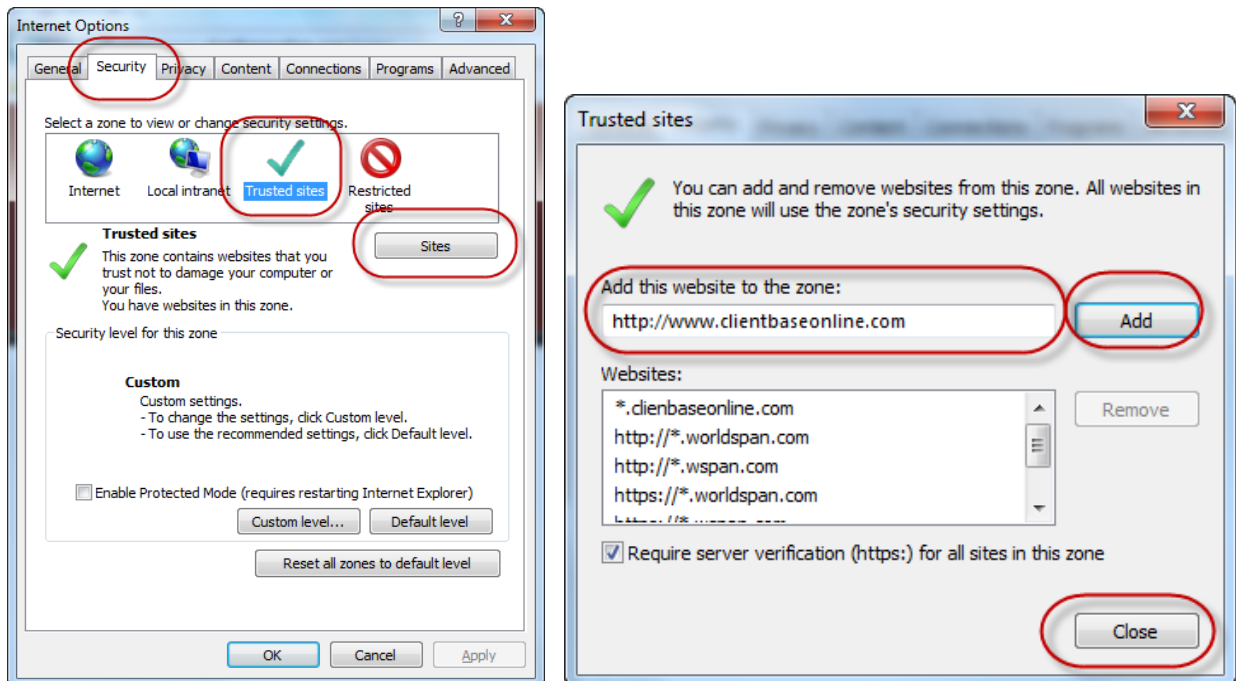
Step 6. Importing an ASCII File.

Step 7. Training Options

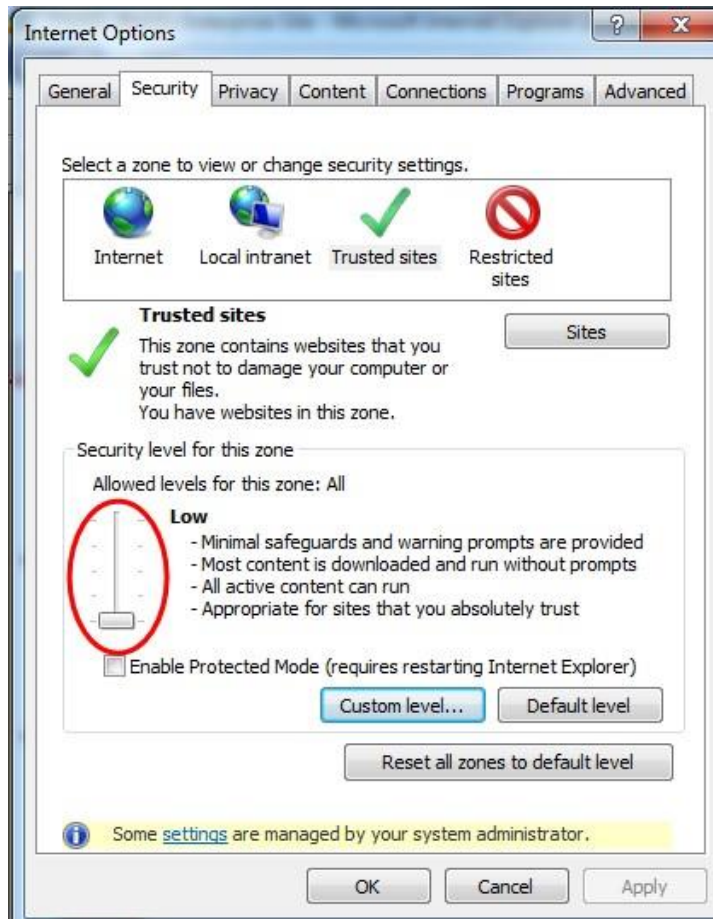
Step 1) Preparing a Computer

1. Mark www.clientbaseonline.com as a trusted site in Internet Explorer

- Open Internet Explorer and navigate to www.clientbaseonline.com.
- Open the Internet Explorer Options dialogue by pressing ALT-T, then choosing **Internet Options** from the list.
- Click on **Security**, then the green checkmark **Trusted Sites**, then the button labeled **Sites**.
- Click **Add** to include www.clientbaseonline.com in the list of trusted sites, then click **Close**.

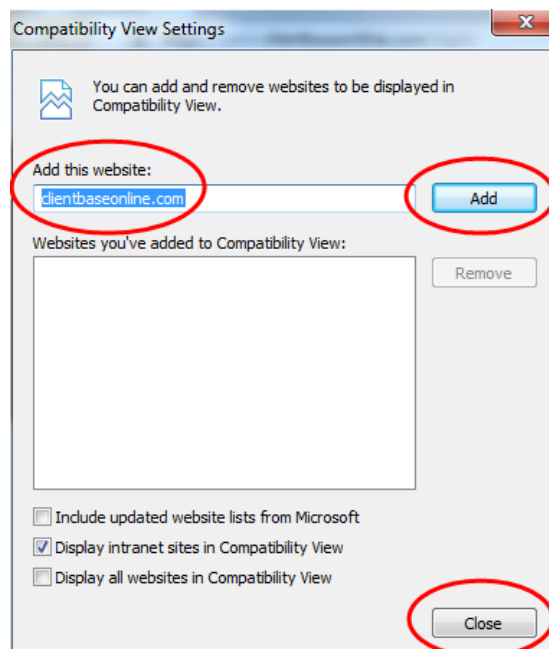


- Move the slider down so the level is set to **Low** and then select **OK**.



2. Add www.clientbaseline.com to Compatibility View Settings

- Open Internet Explorer and Press ALT-T to open the Tools menu, then choose **Compatibility View Setting** from the list.
- Click **Add** to include [clientbaseline.com](http://www.clientbaseline.com) to the list of websites added to Compatibility View, then click **Close**.



3. Run the ClientBase Online Diagnostic Tool

- Once you've completed the above steps, click on the link **Run Diagnostic** from the ClientBase Online login screen (www.clientbaseonline.com/login). Follow the prompts. All of these tests should have a green check mark next to them. If any test fails (has a yellow or red exclamation mark), click the link to learn more.
- Additional help can be found at http://www.trams.com/home/products_services/

Step 2) Branch Setup

- Go to **Tools > Settings > Branch Settings**.
- Click on Branch # 0.
- Enter Branch information.
- Save All Branch Settings.

Branch #	Branch Name
0	Jet Set Travel

General | Branch PNR Entries | Invoice/Trip Proposal Remarks | Invoice Settings | Trip Proposal Settings

Branch No 0

Branch Name

Address

City/State/Zip Code

Phone Fax

E-mail Web Site

Pseudo City Branch ID

Next Sales Invoice No **Enter your starting Invoice number**

Next Refund Invoice No **Enter your starting Refund number**

Step 3) Create an Agent Profile & Link to Branch

- On the menu bar, click **Profile > Agent** to create a new agent profile.
- Enter the *Profile Name* (i.e. Thomas Jones), *Last Name & First Name*.
- Scroll down until you find the field *Branch No*. From the drop-down, select the appropriate branch number.
- Click **Next**. Enter additional information if needed.
- Click **Save**.

ClientBase Online DASHBOARD PROFILES ACTIVITIES RES CARDS ✕ ? 📄

Profiles

-- Global Saved Searches -- -- Personal Saved Searches --

Create New: **Profile** Res Card Note Mailer Reminder

Leisure Clients

Find Profiles by...

Profile Type Leisure

Profile Name/Company

[GO TO ADVANCED SEARCH ▶](#)

Leisure

Corporate

Vendor

Service Provider

Agent

Other

Profile Quick Entry Screen

General Info

Profile Type Profile Name

Agent Tom Jones

Last Name First Name Middle Name

Jones Tom

Courtesy Title

Address Line 1 Address Line 2 Apt/Suite

Zip Code City State Country

USA

Primary Profile Phone Number Primary Profile Phone Description

+ 1 (586) Cell Agrees to receive marketing calls at this number

Interface ID Branch No.

TJ [0]Jet Set Travel

Step 4) Create User Login

- Go to **Tools > Settings > User Logins** and click **Add**.
- Enter *Login Name, Password, User Name, Title, E-Mail*, and **very important**, from the drop-down find the Agent Profile you created and link it.
- Select the appropriate *Authorization and Security Level*.
- **Save**.
- Note: If you are using Sabre Red Workspace, [click here](#) on how to access CBO in that tool.

User Settings
 Saved Search Defaults
 Profile Defaults
 Communication Defaults
 Live Connect
 PNR Import
 E-Mail Settings

Login Name:
Sabre PCC:
Enable SSO:
CBO Enabled:
Sabre Agent ID:

Password:
Verify Password:

User Name:
Title:

E-Mail:
Automatically Update Email Calendar for Uncompleted Reminders:

Agent Profile: Start typing the profile name you just created. You MUST select the agent profile to link it.

Authorization:

Security Levels:

Disable Account

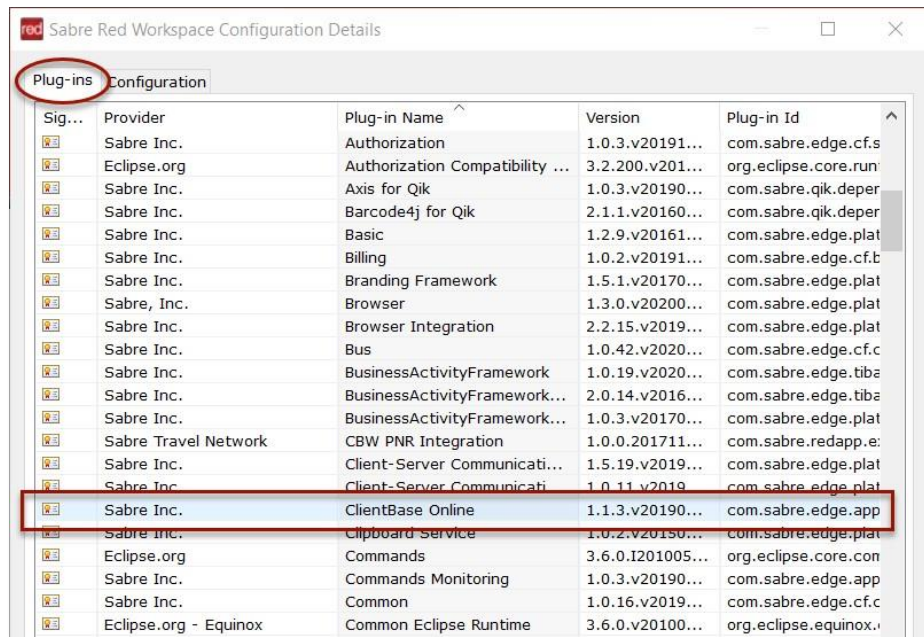
Step 5) PNR Setup for Sabre, Amadeus, Worldspan, Galileo & Apollo

1. Download and Install CBBComps.exe

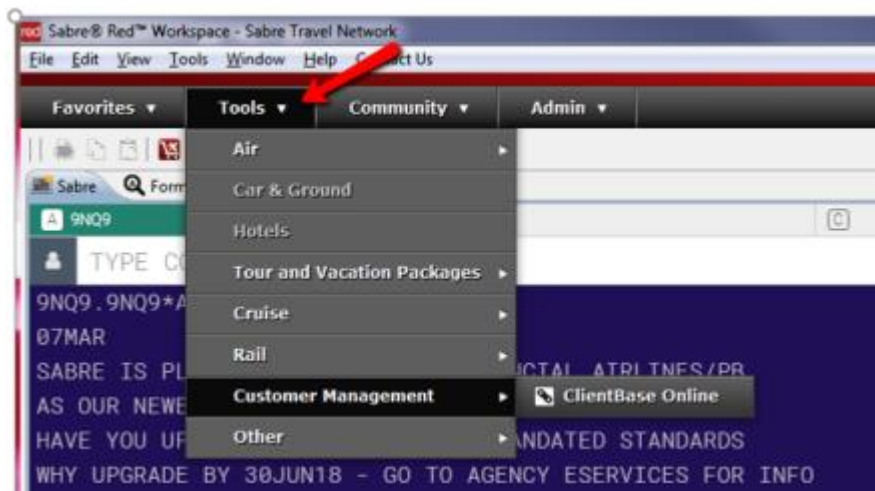
- Click [here](#) to go to the cbbcomps.exe files.
- Scroll to your GDS, read the applicable notes, and click on the **here** link to download the file. When prompted, select **"Run"**
- Follow the prompts.
 - i. If using Worldspan, you'll be prompted to enter the connection ID assigned by Travelport (The "Connection ID" will be required for setup. The connection ID is assigned by Travelport and is in the format of six numeric characters, and underscore (_) and then three more characters. For example, it may look like 123456_000. If this information is not available, contact Travelport support.)

a. Select your GDS in ClientBase Online

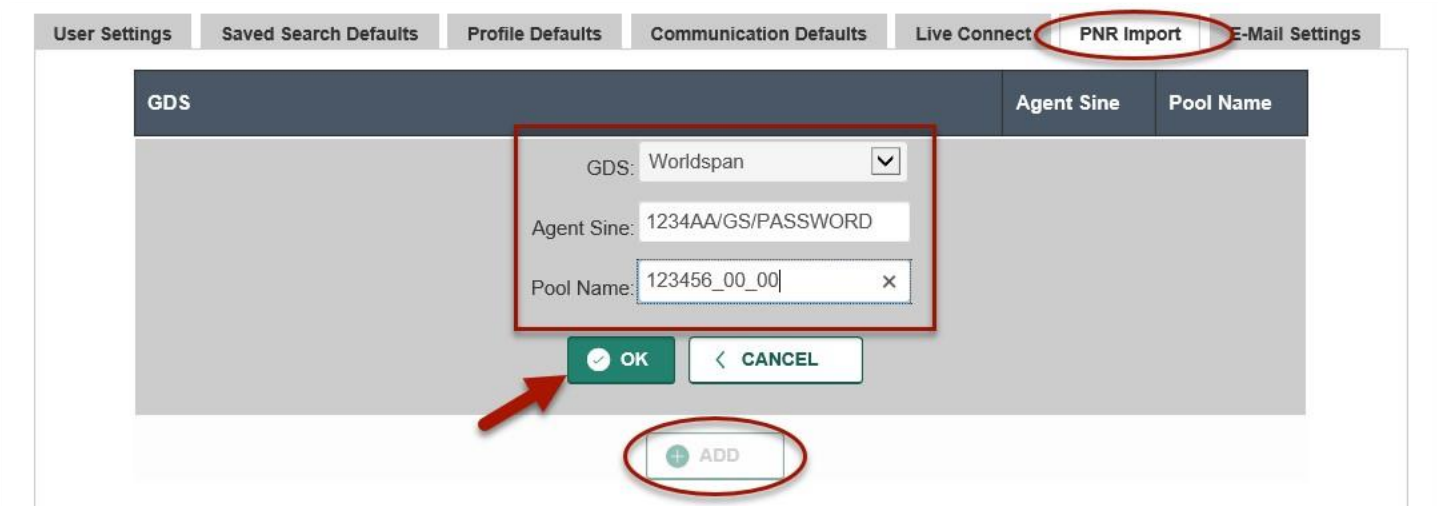
- Go to **Tools > Settings > Merge to PNR Settings**
- Select your GDS
- Select "Use API" for all Sabre, Amadeus, Galileo and Apollo; "Use Clipboard" for Worldspan.
- **SABRE RED USERS ONLY:** Installing Active X Controls for the Merge to PNR and PNR Import features is no longer necessary, however, you will need to access ClientBase Online from within the Sabre Red 360 Platform to use the ClientBase Merge to PNR and PNR Import features. In Sabre Red 360, go to **Help > About Sabre Red Workspace**. Click on **Configuration Details**. Under the **Plug-ins tab**, verify that **ClientBase Online** is listed.



- If the ClientBase Online plug-in is not found in your list, go to Help and click on Check for Updates. After updates, restart Sabre Red 360 and check again.
 - To launch ClientBase Online from SR360, from the black toolbar, select **Tools > Customer Management > ClientBase Online**.



- **WORLDSPAN USERS ONLY:** In CBO, go to the agent login screen. Users can click on **Tools > My Login**. Database administrators can click on **Tools > Settings > User Logins > Select the Agent**. Select **PNR Import**. Click on **Add**, then enter the **Agent Sine** (the same information an agent enters after BSI\$ when logging into Worldspan). The **Pool Name** is assigned by Travelport. When the information is entered, click **OK**, then **Save**.



3. Merge to PNR Rules

- Go to **Tools > Settings > Merge to PNR Rules** to review 6 pre-defined rules, and modify as needed for your GDS. Test by doing a Merge to PNR from any profile (see No. 4 below) and verify that the codes are correct. If not, go back to **Merge to PNR Rules** and update as needed.

4. Usage

- Search for an existing profile in ClientBase Online. Verify data is current and accurate. If no profile is found, create a new one.
- Verify that client data is correct and a Bill To and Ship To address exists. Client data includes accurate address, phone and email information, passengers, and card information.
- Select **PNR** on the Menu Bar.
- Select the correct **GDS**. All are API except Worldspan which uses the clipboard.
- Review the Selection screen. Select and unselect as desired.
- Click **Finish**. Go into the PNR and review the merged data. For Sabre, do a Display All; for Worldspan, paste the data

Step 6) Importing an ASCII File

The ClientBase import utility can only import tab or comma delimited ASCII text files. This means that the file you are importing must be saved in .txt format and use a carriage return between each profile record, and either a tab or comma between each field within each record. If the file you would like to import is not in this format, use a program like Excel to open the file and then save in .txt format.

Step 1: Start the Import Wizard.

- Agencies that obtain profile data in a tab or comma delimited ASCII file (.txt file) can import these profiles directly into *ClientBase* as a user with administrative permissions and clicking **Tools > Import Profile**.

A wizard steps the user through the following steps making it very simple to map the fields included in the ASCII file to the profile fields included in a *ClientBase* profile. All profiles imported via the Import Profile feature are appended to any existing profiles within your current database. (The import feature does not currently update existing profiles.)



Step 2: Retrieve the .txt file that you would like to import by clicking **Browse**.

Profile Import: Select File for Importing

First Line is Header

Delimiter

- **First Line is Header:** If the first line is a table header, check in this box to read the headers for the file.
- **Delimiter:** The default is set to *Tab*. From the drop-down menu, indicate whether the file to import is comma delimited.
- Click **Upload File** to continue.

Step 3: Map Profile General Information

Profile Import: Map Profile General Information

Interface ID Filter:

Update Rule:

ClientBase Fields	Assigned Field in File
Profile No	
Profile Type	

- **Interface ID Filter:** From the drop-down menu, select *Import as is (DO NOT FILTER)* which brings over all special characters such as dashes, parentheses, etc.; or *Only Grab Alpha-Numeric Characters* which strips all special characters from Interface ID by dropping dashes, brackets, etc. (PREFERRED)

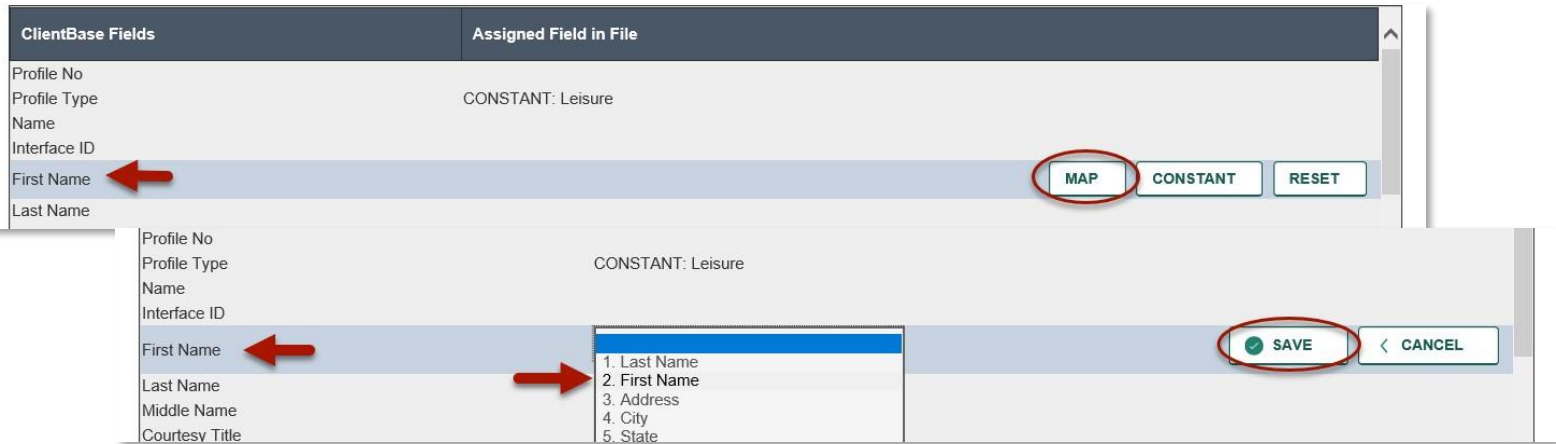
(In order to easily and consistently identify an existing customer or vendor within different applications used within the agency (your GDS, your Back Office etc.), a unique ID should be assigned to each profile. This ID is called the "Interface ID". As an example, this field is associated with the interfacing of records generated from the GDS (Front Office) to the agency accounting system (Back Office). If your agency works with client or vendor data within multiple systems, then we strongly suggest creating a unique Interface ID for each profile.)

Click on each ClientBase Field to assign a field in your ASCII file. Upon clicking a specific field for importing to, notice two buttons that are used to describe how that data can be imported.

- **Constant:** Use this feature when using the same value for every profile being imported. If all the files being imported are Leisure profiles, set the Profile Type field as a constant with a value of Leisure.

ClientBase Fields	Assigned Field in File
Profile No	
Profile Type	<input type="button" value="MAP"/> <input type="button" value="CONSTANT"/> <input type="button" value="RESET"/>
Name	
Interf	
First	Profile No
Last	Profile Type

- **Map:** Mapping is used when a data field exists and is populated in the file while importing. You want to bring the data in "as is" to a field in the database. Select the name of the field that exists in the source file from the dropdown.



- **Reset:** Click to reset any mapping or constant value for that field.
- **Save:** Make sure to save each mapping or constant value. Repeat this process for each *ClientBase* field you want to populate. Be sure to move down and assign a Primary Agent (Constant) and a Branch (Constant). After mapping or setting your constant for each field click **Next** to continue.

ClientBase Fields	Assigned Field in File
Profile No	
Profile Type	CONSTANT: Leisure
Name	
Interface ID	
First Name	MAP: First Name
Last Name	MAP: Last Name
Middle Name	
Active	
Salutation	
Primary Agent	CONSTANT: Beth Vollmar
Referred By	
Branch	CONSTANT: [0] Jet Set Travel
Web ID	
Web Password	
More Field 1: Member ID	

Step 4: Map Communication Entries

- **Default Country Code/Area Code:** Enter a default country and area code.

Click on each *ClientBase Field* to assign a field in your ASCII file. Upon clicking a specific field for importing to, notice two buttons that are used to describe how that data can be imported.

- **Map:** Mapping is used when a data field exists and is populated in the file while importing. You want to bring the data in "as is" to a field in the database. Select the name of the field that exists in the source file from the dropdown,
- **Constant:** Use this feature when using the same value for every profile being imported.
- **Reset:** Click to reset any mapping or constant value for that field.
- **Save:** Make sure to save each mapping or constant value. Repeat this process for each *ClientBase* field you want to populate. After mapping or setting your constant for each field click **Next** to continue.

Profile Import: Map Communication Entries

Default Country Code Default Area Code

ClientBase Fields	Assigned Field in File
Phone Number 1	MAP: Phone
Phone Description 1	CONSTANT: Cell
FAX Number 1	
FAX Description 1	
Email Address 1	MAP: Email
Email Description 1	
Email Permit Marketing 1	
Phone Number 2	

Step 5: Map Address Entries

- Click on each *ClientBase Field* to assign a field in your ASCII file. Upon clicking a specific field for importing to, notice two buttons that are used to describe how that data can be imported.
- **Map:** Mapping is used when a data field exists and is populated in the file while importing. You want to bring the data in "as is" to a field in the database. Select the name of the field that exists in the source file from the dropdown,
- **Constant:** Use this feature when using the same value for every profile being imported.
- **Reset:** Click to reset any mapping or constant value for that field.
- **Save:** Make sure to save each mapping or constant value. Repeat this process for each *ClientBase* field you want to populate. After mapping or setting your constant for each field click **Next** to continue.

Profile Import: Map Address Entries

ClientBase Fields	Assigned Field in File
Primary Bill To Ship To Address Line 1	MAP: Address
Primary Bill To Ship To Address Line 2	
Primary Bill To Ship To Apt/Suite	
Primary Bill To Ship To City	MAP: City
Primary Bill To Ship To State	MAP: State
Primary Bill To Ship To Zip Code	MAP: Zip
Primary Bill To Ship To Country	

Step 6: Map Marketing Entries

- If you have Marketing Entries to map or for which to set a constant, click *Add Marketing Code*. Choose the marketing table you want to use. Notice two buttons that are used to describe how that data can be imported.
- **Map:** Mapping is used when a data field exists and is populated in the file while importing. You want to bring the data in "as is" to a field in the database. Select the name of the field that exists in the source file from the dropdown.
- **Constant:** Use this feature when using the same value for every profile being imported.
- **Reset:** Click to reset any mapping or constant value for that field.

- **Save:** Make sure to save each mapping or constant value. Repeat this process for each *ClientBase* field you want to populate. After mapping or setting your constant for each field click **Next** to continue.

Step 7: Map Profile Remarks

- If you have remarks of additional fields that you have not found a place for, click *Add Remark*. By default the *ClientBase* remarks field is selected. Notice two buttons that are used to describe how that data can be imported.
- **Map:** Mapping is used when a data field exists and is populated in the file while importing. You want to bring the data in "as is" to a field in the database. Select the name of the field that exists in the source file from the dropdown.
- **Constant:** Use this feature when using the same value for every profile being imported.
- **Reset:** Click to reset any mapping or constant value for that field.
- **Save:** Make sure to save each mapping or constant value. Repeat this process for each *ClientBase* field you want to populate. After mapping or setting your constant for each field click **Next** to continue.

Step 8: Review Summary and Import your records.

- Upon completing the wizard's 7 steps above, click the **Finish** button and the summary page will display a message "Importing profiles. Please wait." When this message disappears, the import is complete, and you can scroll to the bottom of the summary page to view the number of profiles successfully imported.

Profile Import: Summary

Date/Time: Tuesday, March 17, 2020 10:33:22 AM

Source File: C:\Users\SG0220510\OneDrive - Sabre\Desktop\agencyimport.txt
 Delimiter: Tab
 First Line is Header

Profile:

Profile Type -----> CONSTANT: Leisure
 First Name -----> MAP: First Name
 Last Name -----> MAP: Last Name
 Primary Agent -----> CONSTANT: Beth Vollmar
 Branch -----> CONSTANT: [0] Jet Set Travel

Communication:

Phone Number 1 -----> MAP: Phone
 Phone Description 1 -----> CONSTANT: Cell
 Email Address 1 -----> MAP: Email

Address:

Primary |Bill To| Ship To Address Line 1 -----> MAP: Address
 Primary |Bill To| Ship To City -----> MAP: City
 Primary |Bill To| Ship To Address State -----> MAP: State

Review before selecting Finish.

If you see a mistake, select Previous to move back to the page to make the correction.

CANCEL PREVIOUS **FINISH**

Step 7) Training Options

Go to training to learn how to use *ClientBase Online*! Go to www.trams.com, click on Training link and *ClientBase Online Getting Started* for complete set of training options.

- 1) Help files are found in the *ClientBase Online* Program by going to **Tools > Help**.
 - 2) Additional *ClientBase Online* Documentation is found [here](#).
 - 3) *ClientBase Online* Recordings are found [here](#).
 - 4) *ClientBase* Daily WebEx Q&A are found [here](#).
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