Set Up to Use ClientBase Online

Setup Order

Need help setting up? Attend a live CBO WebEx setup class at www.trams.com, click on training, Click on ClientBase WebEx Training.

Step 1. Make CBO a Trusted Site

Step 2. Branch Setup

Step 3. Create an Agent Profile & Link to Branch

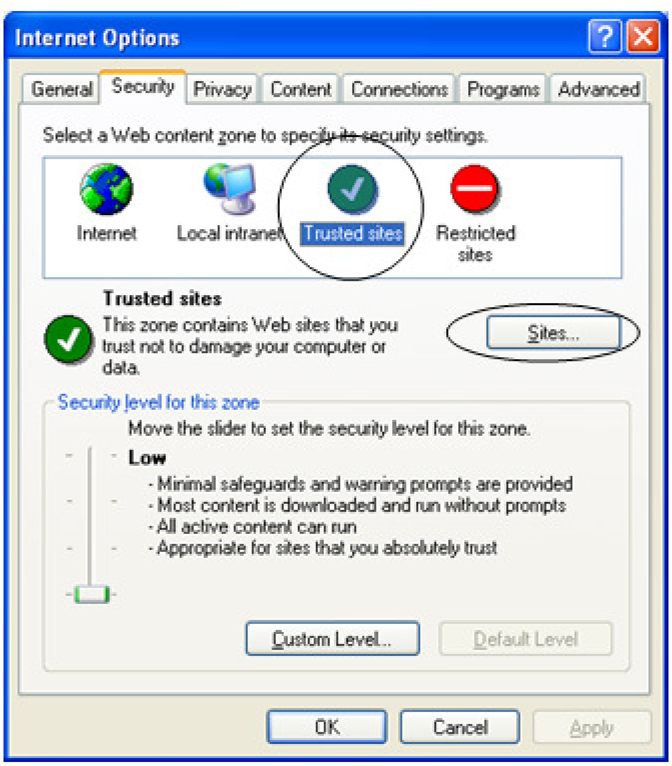
Step 4. Create User Login

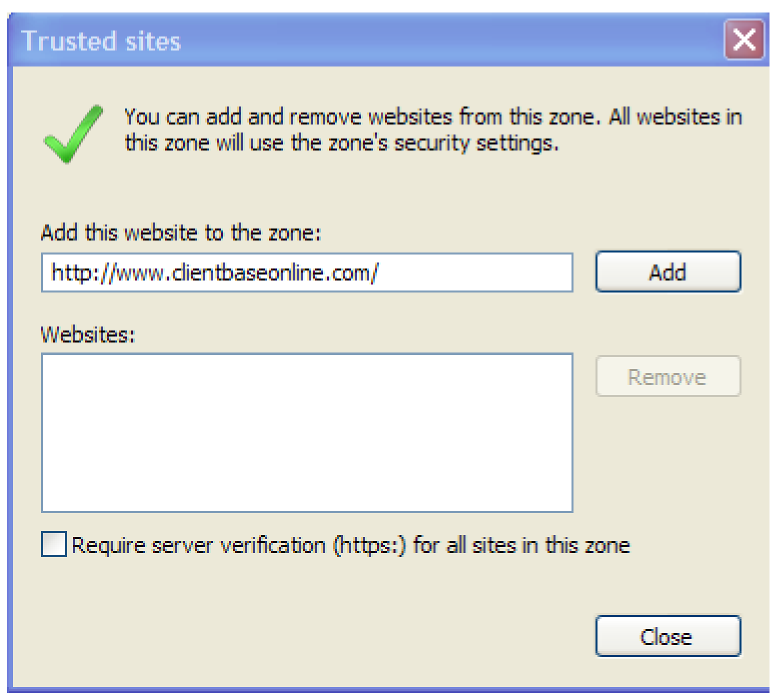
Step 4. Importing an ASCII File

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

Step 1) Make CBO a Trusted Site

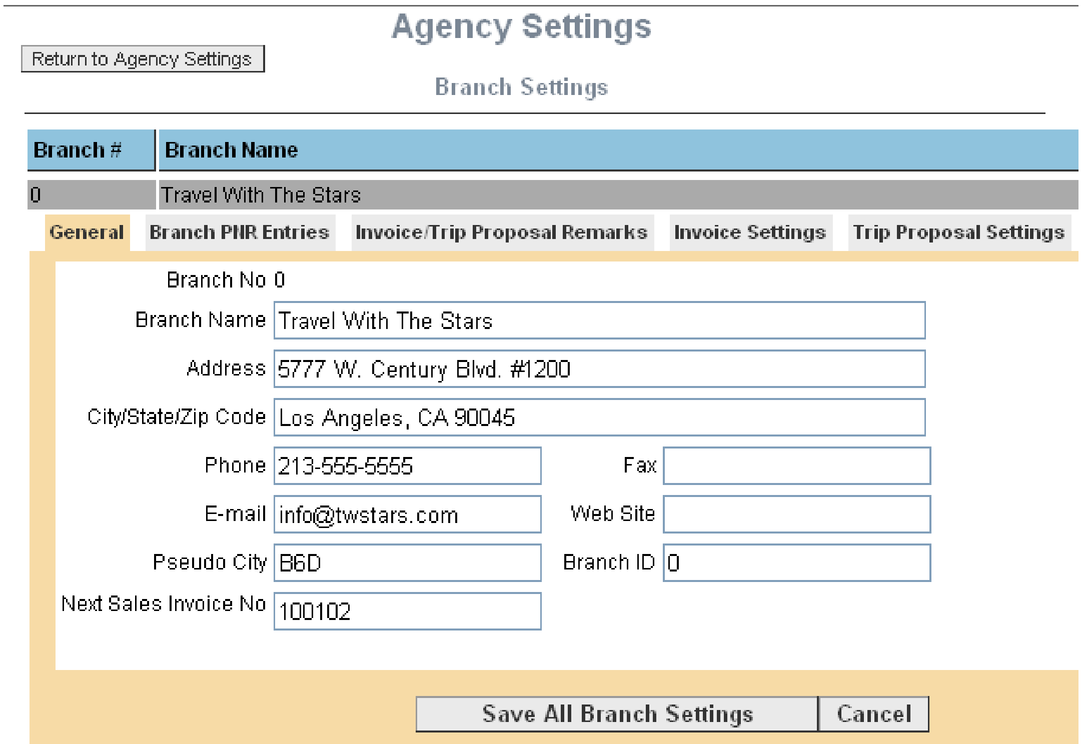
Click on **Tools** and **Internet Options** in Internet Explorer. Click on **Security** and on the **Green Circle, Trusted sites**. Click on **Sites. Add** the http://www.clientbaseonline.com URL. Click OK to save each screen. (Make sure the Security Level for this zone is Low.)





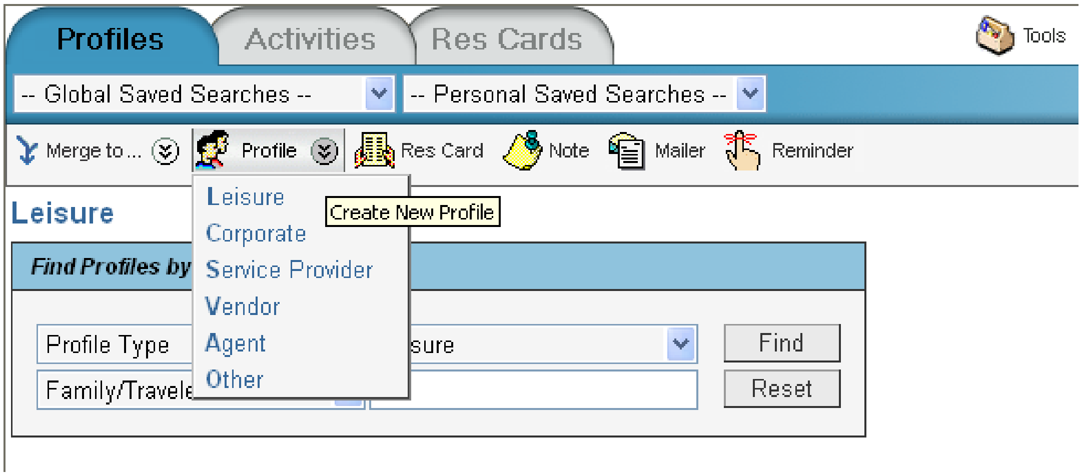
Step 2) Branch Setup

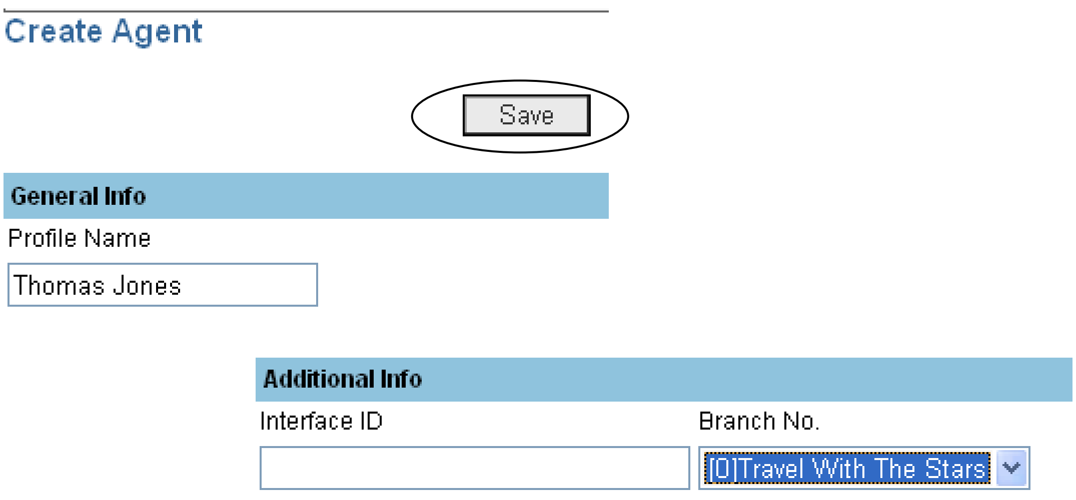
Go to **Tools|Settings|Branch Settings**, click on 0 Branch, enter Branch information, and **Save All Branch Settings**:



Step 3) Create an Agent Profile & Link to Branch

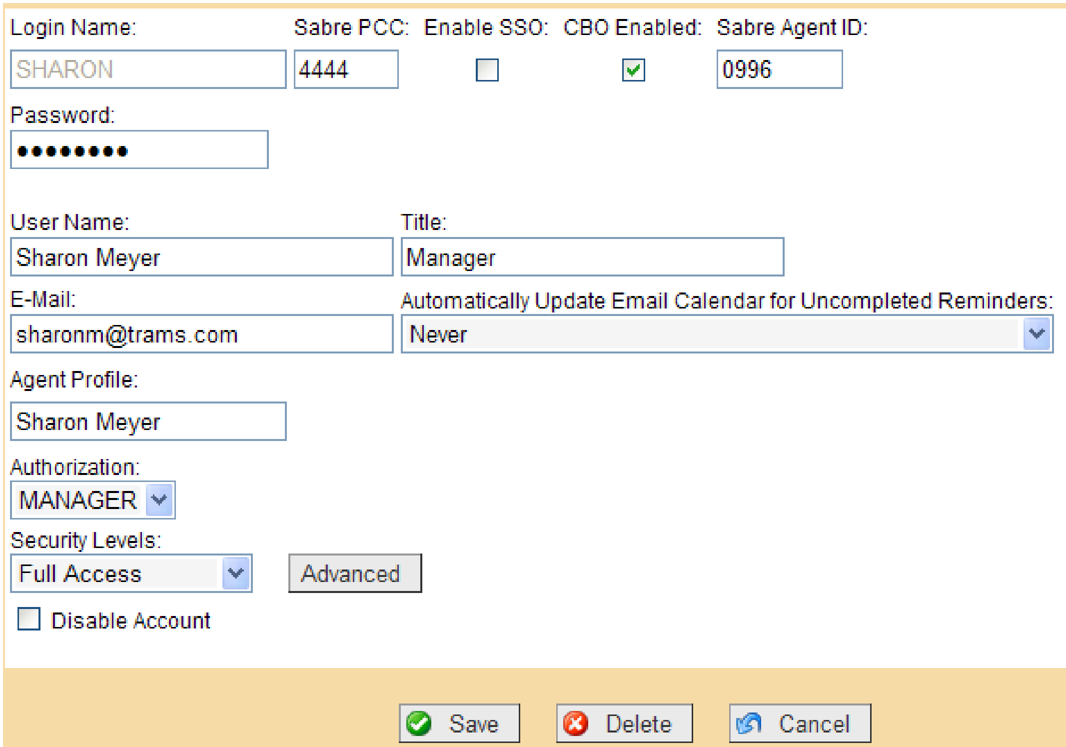
On toolbar, click **Profile|Agent** to create a new agent profile. In *Profile Name*, type your Name, i.e., Thomas Jones. Scroll down until you find the field *Branch No.* From the drop-down, select Branch 0 and **Save.**





Step 4) Create User Login

Go to **Tools|Settings|User Logins** and click ***Add.*** Enter *Login Name, Password, User Name, Title, E-Mail, check CBO Enabled,* and ***very important,*** from the drop-down find the Agent Profile you created and link it. The *Authorization* is Manager and the *Security Level* is Full Access. **Save.** Repeat for every user.



Step 5) 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.**

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 feature are appended to any existing profiles within your current database. (The import feature does not currently update existing profiles.)

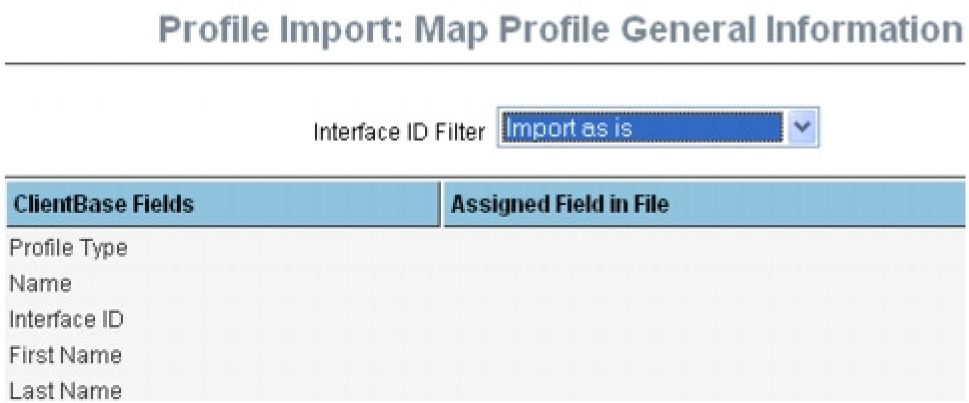
Step 2: Retrieve the .txt file that you would like to import by clicking *Browse*.

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



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.

(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.

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 drop-down.

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.

Reset: Click to reset any mapping or constant value for that field.

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 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.

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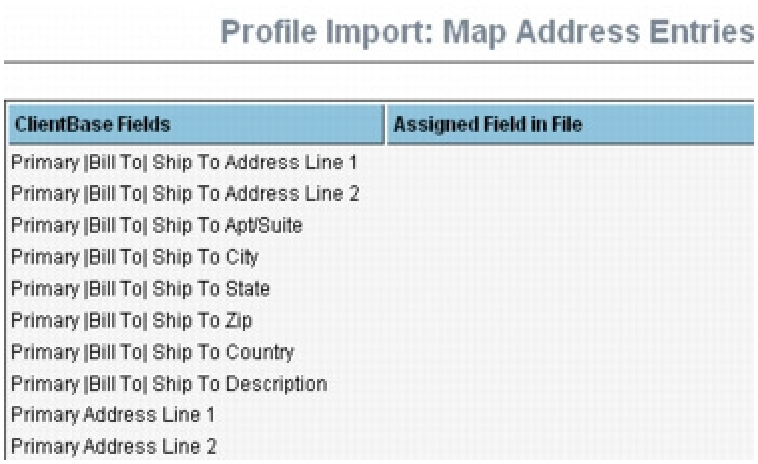
Constant: Use this feature when using the same value for every profile being imported.

Reset: Click to reset any mapping or constant value for that field.

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 5: Map Address Entries



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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.

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 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 drop-down,

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.

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 drop-down,

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.

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.

Step 6) PNR Setup Including Set Up of MySabre, Amadeus, Galileo, Apollo, and Worldspan

A. **Go to Tools|Settings|Merge to PNR Settings** and select the GDS. **Note to Sabre Red Users:** Enable the Sabre API within Sabre Red by going to Tools|Options|Sabre System|Advanced and checking MySabre API. A message informs you to log out and log in again to activate the MySabre API. When you go into CBO's *Merge to PNR Settings,* select *Use MySabe API.*

B. 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 and verify that the codes are correct. If not go back to #2 and modify rules.

C. Usage

Start by checking availability in the GDS. Toggle into ClientBase and search for an existing profile. If found verify data is current and accurate. If none 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.
- Merge to PNR by using the icon on the profile toolbar.
- Select the correct GDS (all are API) except Worldspan which uses the clipboard.
- Review Selection screen. Select and unselect as desired.
- Click *Finish*. Go into PNR and review merged data. (For Sabre do a *Display All* to see; for Worldspan, paste the data.

Step 7) Training Options

Go to training to learn how to use ClientBase Online! Go to www.trams.com , click on Training link and Getting Started - CBO Training for complete set of training options. Help files are found in the ClientBase Online Program by going to **Help.**