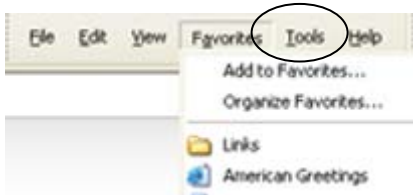


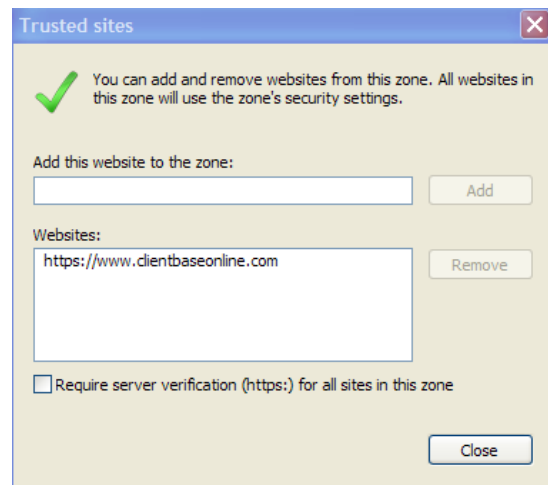
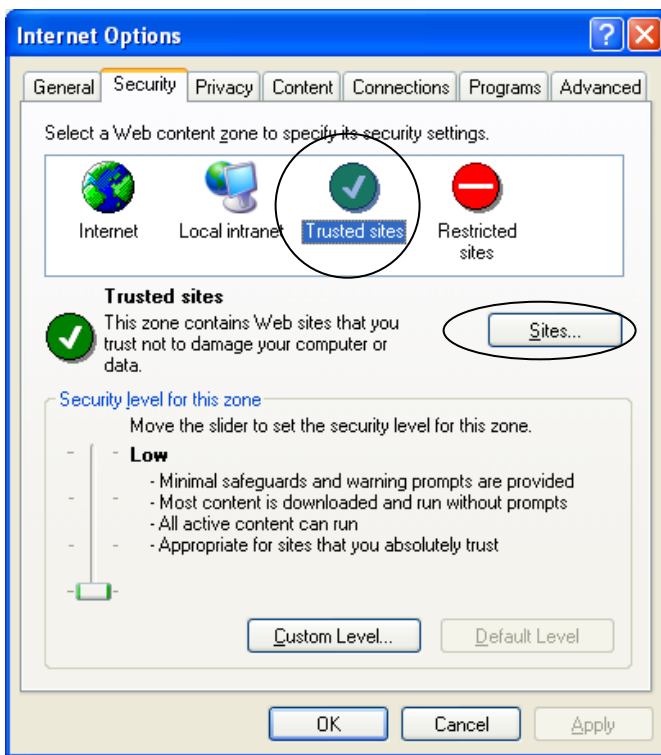
Basic ClientBase Online Invoicing

STEP 1) Make ClientBase Online a **TRUSTED SITE** on your computer (one time setup):

- Click on Tools and Internet Options in Internet Explorer.



- Click on Security and click on the Green Circle, Trusted sites. Next click on Sites.



1. Add https://www.clientbaseonline.com to Trusted sites.
2. Click OK.
3. Make sure the Security Level for this zone is Low.
- 4.

STEP 2) Find the client's profile using the *Simple Search* in CBO. Enter the first few letters of the client's last name and select the appropriate client from the drop down list. Click on *Find*, then *View*. If no profile exists, create one by clicking on the 2 heads icon on the toolbar.

Profiles Activities Res Cards Help Tools

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

Merge to ... Profile Res Card Note Mailer Reminder Reports

Find Profiles by...

Profile Type: Leisure Find Reset

Profile Name/Company: Rosicki/Jaime [Go to Advanced Search](#)

Count First | Previous | Next | Last | [Select Columns](#) | [Sort by Col](#)

	Profile Type	Name	Interface ID	City	State
View L		Rosicki/Jaime			

- Ensure that the client profile includes accurate and up-to-date information:
 - In the **General Info** page, check for Address, Bill-to and Ship-to address(es), primary telephone number and primary e-mail address.
 - In the **Family Members** page, ensure that each traveler is listed and includes at least his or her full name. If a traveler is not listed, click **Add** and enter the traveler's information.

Leisure - Able/Kenneth **Family Members**

Kenneth Able
5432 Chestnut Ln
Los Angeles, CA 90045
USA

Phone: +1 (310) 555-9891 Interface ID: 3105559891
 Fax: Primary Agent: Rebecca
 E-mail: kenandsue@example.com Created: 7/12/10
 Web: Groups: Profile No.: 1392827

Remarks:

More about Able/Kenneth... **Family Members - Summary** [Switch to Detail View](#) Paste Add

	Name	Relationship	Age	Birth Date	Gender	First Name	Middle Name	Last Name
View	Able/Kenneth	Primary	49	11/15/60	M	Kenneth	Alan	Able
View	Able/Susan	Spouse	48	6/21/62	F	Susan	Elizabeth	Able

- It's also helpful to save the client's credit card information to his or her profile. To enter/review credit card information, click on the **Credit Cards** link.

Leisure - Able/Kenneth

Credit Cards

Kenneth Able 5432 Chestnut Ln Los Angeles, CA 90045 USA	Phone:	+1 (310) 555-9891	Interface ID:	3105559891
	Fax:		Primary Agent:	Rebecca
	E-mail:	kenandsue@example.com	Created:	7/12/10
	Web:		Groups:	
			Profile No.:	1392827

Remarks:

More about Able/Kenneth...

- General Info
- Remarks
- Marketing Codes
- Family Members
- Activities
- Credit Cards**
- Loyalty Programs

Credit Cards - Summary [Switch to Detail View](#) + Add

	Card Type	Card Code	Number	Exp Date	Name on Acct	Card Description	Issued E
Edit	Credit Card VI		VI 41-XXXX-1111	12/31/15	Kenneth A Able	Visa	USBank

STEP 3) Once the client's profile is up-to-date, create a new **Res Card**. Either click on the **Res Card** button in the button bar, or select the **Res Cards** link in the More Info area and click **Create Res Card**.



Leisure - Able/Kenneth

Res Cards

Kenneth Able 5432 Chestnut Ln Los Angeles, CA 90045 USA	Phone:	+1 (310) 555-9891	Interface ID:	3105559891
	Fax:		Primary Agent:	Rebecca
	E-mail:	kenandsue@example.com	Created:	7/12/10
	Web:		Groups:	
			Profile No.:	1392827

Remarks:





More about Able/Kenneth...

- General Info
- Remarks
- Marketing Codes
- Family Members
- Activities
- Credit Cards
- Loyalty Programs
- Res Cards**
- Travel History

Res Cards - Summary [Switch to Detail View](#) + Paste -- Create Res Card --

Filters			
All Res Cards	Active	Departed	Cancelled
No Res Cards.			

- Each res card is information on ONE trip. Enter the basic information about this trip, including the **Reservation Cycle**, **Marketing Source** (if told to do so), **Region/Destination** and a **Trip Name**.
 - You can include any internal notes in the **Agent's Remarks** field.
 - Notice that we've left the **Trip Start Date** and **Trip End Date** blank. These fields will be filled in automatically when we add reservation details later.

Create Date	Branch	Status
7/12/10 	[1]Apple Travel Agency ▾	Active ▾
Reservation Cycle		
Booked	-Reservation Cycle Sel- ▾	
Marketing Source		
E-mail blast	-Marketing Source- ▾	
Group		
	-Group Sel- ▾	
Region		
Bermuda & Caribbean	-Region Sel- ▾	
Destination		
Caribbean - Eastern	 Destination	
Prepared for	Trip Name	Locator No.
[1392827] Able/Kenneth	Caribbean Cruise 2011	
Trip Start Date	Trip End Date	
		
Ship to Address		
Kenneth Able 5432 Chestnut Ln Los Angeles, CA 90045		
Bill to Address		
Kenneth Able 5432 Chestnut Ln Los Angeles, CA 90045		
Agent Remarks		
First time cruisers.		
Done		

- Add/edit passengers by clicking on the **Passengers** link in the More Info About This Trip menu. To add a passenger, click **Add**. To edit/remove a passenger, click **Edit** next to his or her name.

Res Card - Able/Kenneth **Passengers**

Res Card No.: 243635	Agent: Rebecca	Trip Name: Caribbean Cruise 2011
Res Total: 0.00	Status: Active	Trip Start Date:
Invoiced Total: 0.00	Res. Cycle: Booked	Trip End Date:
Balance: 0.00		

More about this trip...

- General Info
- Passengers**
- Reservations
- Invoices
- Itinerary Report
- Activities
- Attachments
- More Fields

Passengers + Add

	Name	Last Name	First Name	Type	Primary
Edit	Able/Kenneth	Able	Kenneth	Adult	N

- After clicking add, select the traveler from the dropdown menu, then click **Save**.

Res Card - Able/Kenneth **New Passage**

Res Card No.: 243635	Agent: Rebecca	Trip Name: Caribbean Cruise 2011
Res Total: 0.00	Status: Active	Trip Start Date:
Invoiced Total: 0.00	Res. Cycle: Booked	Trip End Date:
Balance: 0.00		

✔ Save
↶ Cancel

Passenger

Passenger

Able/Kenneth
 Able/Susan

Type

Adult

Primary

✔ Save
↶ Cancel

- Click on the **Reservations** link, then **Add Reservation**. In this example, we're going to create a cruise reservation.

Res Card - Able/Kenneth **Reservations**

Res Card No.: 243635	Agent: Rebecca	Trip Name: Caribbean Cruise 2011
Res Total: 0.00	Status: Active	Trip Start Date:
Invoiced Total: 0.00	Res. Cycle: Booked	Trip End Date:
Balance: 0.00		

More about this trip...

- General Info
- Passengers
- Reservations**
- Invoices
- Itinerary Report
- Activities
- Attachments
- More Fields

Close Res Card

Reservations ↑ ↓ Paste

No Reservations.

-- Add Reservation --

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

- Enter the first few letters of the vendor's name, then select from the dropdown list. Also enter the vendor's confirmation number.
 - You can also enter the duration of the trip, number of passengers and number of cabins.

Cruise

Date Reserved: 7/12/10 Booking Status: Confirmed Promo ID:

Vendor:
Carnival Cruise Lines

Booking Method: [-- Booking Method --]

Reservation Status: [-- Reservation Status --]

Duration: No. of Pax: No. of Cabins:

Invoiced Outside CB: Issued through ARC:

Domestic/International: Host Code:

- Enter the base fare, total taxes and commissions. Note that the client's total will equal the Base+Taxes, so in the example, the trip total is \$2,500.00.
- Any remarks you enter in the **Itin/Invoice** remarks box will appear on the client's trip documents. Any remarks entered in the **Agent Remarks** box will only be visible inside CBO.
- Click **Save** at the bottom of the screen.


Passengers


- Able/Susan
- Able/Kenneth

Charge As:

	Base	Tax		Commission	
Total:	2000.00	500.00	0.00 %	280.00	14.00 %

Payment Due Date

Deposit Due Date: 

Final Payment Due Date: 

Itin/Invoice Remarks

- Clicking **Create Reminders** will automatically create a reminder for both the deposit due date and final payment due date.
- After saving, scroll to the bottom of the reservation screen.
- Click **Edit** next to the service provider record.

Payment Due Date

Deposit Due Date: 07/16/2010

Final Payment Due Date: 12/22/2010

 Create Reminders

Itin/Invoice Remarks

Agent Remarks

Service Provider



-- Add Service Provider --

	Type	Start Date	End Date	Service Provider	Code
View Edit	Cruise			Carnival Cruise Lines	CCL

- On the **Service Provider Screen**, fill in the ship's name and start date and end date. You can fill in as many of the other details as you'd like to appear on your client's trip documents. Click **Save**.

Ship
 Carnival Celebration [-- Service Provider --]

Start Date 10/23/2011 End Date 10/30/2011

Category B Deck 7 Cabin/Room 7013

Dining Reserved [-- Cruise Dining --]

Smoking Non-Smoking

Bedding Queen Queen

Description 7-Night Eastern Caribbear

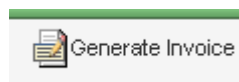
Cruise Itinerary Print Option Sort by Date/List Arrive then Depart

Passengers

Able/Kenneth
 Able/Susan

Itin/Invoice Remarks

Step 3) In Click on the **Generate Invoice** button at the top of the screen to record a payment and issue invoice.



- Enter any invoice remarks you'd like to appear at the bottom of the screen.
- Be sure to select the correct **Travel Type** and **Submit To**, and enter the amount of this payment.
- Click **Preview**. If the amounts don't look right on the preview screen, click **Close** to return to the invoice screen. If everything looks correct, click **Generate Invoice**. The invoice will launch in Adobe Acrobat Reader and can be printed, e-mailed or saved to your computer. The invoice now resides in the **Invoice** link in the Res Card from where it can be reprinted or e-mailed as long as your program is setup with SMTP e-mail.

Cancel Customize Format Preview Generate Invoice

Issue Date 07/13/2010

We are pleased that you've chosen Travel With the Stars.
We strongly recommend the following:

Remarks Trip Balance Due Date 12/22/2010

Invoice for Able/Kenneth

Branch 0

Locator No.

Group

Invoice Payment

Form of Payment Check / CC Number

Credit Card 4111111111111111/ -Select Credit Card-

Category Cruise

Vendor Carnival Cruise Lines

Passenger Able/Kenneth;Able/Susan;

Confirmation No 97X1234

Depart Date 10/23/2011

Return Date 10/30/2011

Pass Name

Start Ticket No

End Ticket No

1.0 <input checked="" type="checkbox"/>	Base	Tax	Comm	Total Fare
Total	2,000.00	500.00	280.00	2,500.00
Sale <input checked="" type="radio"/>				
Not Invoiced	2,000.00	500.00	280.00	2,500.00
This Invoice	500.00	0.00	0.00	500.00

Travel Type

Ship-Dpst

Submit to

Supplier

Agent

Agent	Amount	% Rate	
Rebecca	[--- Select Agent ---]	0.00	0.00

More Agents [1]

ABC Travel Co
 1234 Main St
 Any Town, US
 555-123-4567

Invoice No. : 4486
 Invoice Date : 7/13/2010
 Travel Consultant : Rebecca
 Group No. :
 Page No. : 1

Kenneth Able
 5432 Chestnut Ln
 Los Angeles, CA 90045

Cruise Reservation			
Vendor	: Carnival Cruise Lines	Confirmation No.	: 97X1234
Booking Status	: Confirmed	Duration	: 7
No. of Cabins	: 1	No. of Passengers	: 2
Start Date	: 10/23/2011	End Date	: 10/30/2011
Passengers	: Able/Kenneth; Able/Susan		



Cruise

Carnival Celebration

Start Date	: 10/23/2011	End Date	: 10/30/2011
Category	: B	Deck	: 7
Cabin/Room	: 7013	Dining	: Reserved
Smoking	: Non-Smoking requested	Bedding	: Queen
Description	: 7-Night Eastern Caribbean		

	<u>Base</u>	<u>Tax</u>	<u>Total</u>
Reservation Totals	\$ 2,000.00	\$ 500.00	\$ 2,500.00
Prior Invoice Totals	\$ 0.00	\$ 0.00	\$ 0.00
This Invoice Totals	\$ 500.00	\$ 0.00	\$ 500.00
		Paid By Credit Card /# XXXXXXXXXXXXXXX1111:	\$(500.00)
		Balance due on Dec 22, 2010:	\$ 2,000.00

We are pleased that you've chosen Travel With the Stars.
 We strongly recommend the following:

- 1.) Travel Insurance to protect your vacation investment. Trip Insurance is strongly recommended to protect