

Step 1. Mark <u>www.clientbaseonline.com</u> as a trusted site in Internet Explorer

- Open Internet Explorer and navigate to <u>www.clientbaseonline.com</u>.
- 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.

Internet Options	
General Security Privacy Content Connections Programs Advanced Select a zone to view or change security settings. Internet Local intranat Trusted sites Trusted sites	Trusted sites X You can add and remove websites from this zone. All websites in this zone will use the zone's security settings.
This zone contains websites that you trust not to damage your computer or your files. You have websites in this zone. Security level for this zone	Add this website to the zone: http://www.clientbaseonline.com Add
Custom Custom settings. - To change the settings, click Custom level. - To use the recommended settings, click Default level.	Websites: *.dienbaseonline.com http://*.worldspan.com http://*.wspan.com
Enable Protected Mode (requires restarting Internet Explorer) Custom level Default level Reset all zones to default level	https://*.worldspan.com
OK Cancel Apply	Close

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

eneral	Security	Privacy	Content	Connections	Programs	Advanc
Select a	a zone to v	iew or cha	ange securi	ity settings.	0	
Inte	ernet L	ocal intra	net Trust	ed sites Res	stricted sites	
	Trustee	sites			(
Secur	your file You hav	s. e website: r this zone	s in this zor	ie.		
Allo	wed levels	for this zo	one: All			
	Low - / - / - / - / - / - /	Minimal sat Most conte All active c Appropriat otected M	feguards a ent is down content car ce for sites lode (requi	nd warning pro loaded and rur run that you absol	mpts are pro without pro utely trust nternet Exp	ovided ompts lorer)
			Cust	tom level	Default	level
				Reset all zone	s <mark>to d</mark> efault	level
6 S	ome <u>settin</u>	igs are ma	naged by	your system ad	ministrator.	

Step 2. Find the client's profile using 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 *Create New: Profile* in the menu items.

Merge Options 👻			Cr	eate New:	Profile 👻	Res Card	Note	Mailer	Reminder	Reports 👻
Find Profiles by Profile Type V Lei Profile Name/Company Able	sure e Jr/Kenneth GO TO ADVAN	CED SEARCH >								
√ COUNT				First I	Previous Ne	ext Select C	olumns 3	Sort by Co	olumns Save	ed Searches
Profile Type	Name A	Interface ID	City	State		Zip Code		Con	nmunication E	intry
View 🗱 🗸 L	Able Jr/Kenneth	4195553152	Fargo	ND		48312		+1 (4	19) 555-3152	

- Ensure that the client profile includes accurate and up-to-date information:
- On the *General Info* page, check for Address, Bill-to and Ship-to address(es), primary telephone number and primary e-mail address. If your agency uses Trams Back Office, there must be an Interface ID.
- On the Travelers page, ensure that each traveler is listed and includes at least his or her legal full name. If a traveler is not listed, click *Add* and enter the traveler's legal first/middle/last name. Birthday and Passport information goes in this area.

Leisure - Able Jr/Ke	nneth	ו								Travelers	\times
Mr. Kenneth Able Jr Susan Jones 4563 Maple Tree Ave Fargo, ND 48312		E-mail: kenandsue@sample.com Cell: +1 (419) 555-3152 E-mail: ken@example.com E-mail: sjones@yahoo.com				Codes raveler Groups	: 28 : Able Jr/Ke : stanford	nneth Alan Alumni	Primary Agent: E Created: 2 Salutation: N Interface ID: 4 Profile No.: 5	9eth Vollmar /12/12 1r. Able Jr 195553152 438290	© € ∰
Remarks: VIP - Client since 2001											
About Able Jr/Kenneth	Travele	rs - Sun	mary Switch to Detail V	iew				Ŷ		RCH 🕒 AL	
General Info			Name	Relationship	Primary	Age	Birth Date	Primary Phone	Primary Email	Primary Fax	Pri
Communications	View	۵-	Able Jr/Kenneth Alan	Primary	Y	60	04/29/1960	+1 (419) 555-3152	ken@example.co	m	
Remarks	View	٥-	Jones/Susan Weeble	Spouse	Ν	59	09/22/1961		sjones@yahoo.co	m	
Marketing Codes	View	٥-	Able/Jon William	Son	N	25	11/04/1995				
Activities	View	0 -	Able/Abigail Ann	Daughter	N	31	01/02/1990				
Orodit Corde											

It's also helpful to save the client's credit card information to his or her profile. To enter or review credit card information, click on the *Credit Cards* page. If the client has frequent flyer, hotel, cruise or car loyalty numbers, these go in the *Loyalty Programs* page.

ClientBase Online Basic Invoicing

Leisure - Able Jr/Ke	enneth							Credit Card	$_{s} imes$
Mr. Kenneth Able Jr Susan Jones 4563 Maple Tree Ave Fargo, ND 48312	E	E-mail: kenand Cell: +1 (41: E-mail: ken@e E-mail: sjones	dsue@sample.com 9) 555-3152 example.com @yahoo.com	Marketin Primary	g Codes: 28 Traveler: Able Jr/ł Groups: Stanfor	Kenneth Ala D ALUMNI	Primary Ager n Create Salutatio Interface II Profile No	 beth Vollmar 2/12/12 m: Mr. Able Jr 4195553152 5438290 	□ つ Ⅲ
Remarks: VIP - Client since 2001									
About Able Jr/Kenneth	Credit Car	ds - Summary 🖇	Switch to Detail View					•	DD
General Info		Card Type	Traveler	Card Code	Number	Exp Date	Name on Card	Card Description	Issue
Communications	Edit	Credit Card		VI	1234-XXXX	12/31/22		Visa	Τ.
Remarks	Edit	Credit Card	Able Jr/Kenneth Alan	VI	VI 44-XXXX-1111	3/31/21	Kenneth Alan Able	Visa	1
Marketing Codes Travelers	Edit	Credit Card	Able Jr/Kenneth Alan	AX	AX 37-XXXX-2004	7/1/23	Kenneth Alan Able Jr	American Express	
Activities									
Credit Cards									
Loyalty Programs									

Step 3. Create a Res Card

• Select Res Card in the menu bar, or select the Res Cards page and click *Create Res Card*.

Merge Options 😽					Create New:	: PNR 🕻	Res Card	Live Connect	Note	Mailer	Reminder
Leisure - Able Jr/Ke	enneth								I	Res Car	$_{\sf ds} imes$
Mr. Kenneth Able Jr Susan Jones 4563 Maple Tree Ave Fargo, ND 48312	E-ma Ca E-ma	ail: kenandsue(ell: +1 (419) 55 ail: ken@exam ail: sjones@yal	@sample.c 5-3152 ple.com hoo.com	xom Marke Prima	eting Codes: ary Traveler: Groups:	28 Able Jr/Ke STANFORD /	nneth Alan Alumni	Primary Ag Crea Saluta Interface Profile	ent: Beth ted: 2/12 tion: Mr. / e ID: 419 No.: 543	1 Vollmar 2/12 Able Jr 5553152 8290	□ つ Ⅲ
Remarks: VIP - Client since 2001											
About Able Jr/Kenneth	Res Cards - Su	Immary Switch to	Detail View				PASTE		create Res	Card	Ŷ
General Info Communications	Filters All Res Cards	\$	Activ	e		Departed		Ca	ncelled		
Remarks		Res Card No.	Status	Trip Locator	Trip Name		Create	Date Regio	n		Trip Sol
Marketing Codes	View 🛱 -	77591416	Active		Anniversary T	rip 2021	11/4/20) Bermu	da & Carib	bean	
Activities	View 🗘 -	77413391	Active		Trip Name		9/9/20	Bermu	da & Carib	bean I	Direct M
Credit Cards	View 🛱 -	76385222	Active		African Safari		3/16/20) Africa			
Lovalty Programs	View 🗘 -	73380194	Active		Cancun Lead		11/14/1	19 Bermu	da & Carib	bean I	nternet
Res Cards	View 🗘 -	73345514	Active		DLV		2/28/19	9		I	E-Blast

- Each Res Card is information on ONE trip. Enter the basic information about this trip, including the Reservation *Cycle, Region, Destination,* a meaningful *Trip Name* and any other fields you are instructed to fill out.
- You can include any internal notes in the *Agent's Remarks* field which has unlimited room, so you don't have to copy notes on your yellow pad or in a folder on your desk.
- 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.

Res Card		
Agent		
Beth Vollmar	[Select Agent]	~
Create Date		
4/9/21	12	
Branch		
[0]Jet Set Travel		~
Status		
Active	*	
Reservation Cycle		
Booked	-Reservation Cycle Sel-	~
Marketing Source		
E-Blast	-Marketing Source-	~
Group		
	-Group Sel-	~
Region		
Mexico & Central America	-Region Sel-	~
Destination		
Cancun		
Prepared for		
[5438290] Able Jr/Kenneth		
Trip Name	Locator No.	
Spring Break 2022		
Trip Start Date	Trip End Date	
	12	1

- Add or search for travelers by clicking on the Travelers page in the More about this trip menu.
 - o To add a traveler, click *Add Traveler*.

- When adding a Traveler, ClientBase Online will automatically search your database to find a match in other profiles. If it finds a match, you will be prompted to select the traveler it found or to add it as new.
- o To remove a passenger, un-check the box to the left of the name.
- o If you are importing a reservation from Live Connect or a PNR, you do not need to insert passengers.

	Res Card - Able Jr/Kenr	neth		Edit Traveler $ imes$
About this trip: General Info Travelers Reservations	Currency Trip Total USD Res Total: 0.00 Invoiced Total: 0.00 Balance: 0.00	Res Card No.: 78145207 Agent: Beth Vollmar Status: Active Res. Cycle: Booked Trip Name: Spring Break 2022 Trip Start Date: Trip End Date:		
Itinerary Report		SAVE	< CANCEL	
Activities	avelers			ADD TRAVELER V
More Fields	Name	Last Name First Name	e Middle Name	Type Primary
X Close Res Card	Able Jr/Kenneth Alan	Able Jr Kenneth	Alan	Adult Y
	Jones/Susan Weeble	Jones Susan	Weeble	Adult N
	Able/Jon William	Able Jon	William	Adult N
	Able/Abigail Ann	Able Abigail	Ann	Adult N

• Click on the *Reservations* link, then select the type of reservation by selecting the appropriate travel category icon in the header. In this example, we're going to create a tour reservation.

Res Card - At	ole Jr/Kennet	th					Reserva	tions
Res Card Totals Currency Res Total: Invoiced Total: Balance:	Trip Total USD 0.00 0.00 0.00 0.00	Res Card No.: 78145207 Agent: Beth Vollmar Status: Active Res. Cycle: Booked Trip Name: Spring Break 2022 Trip Start Date: Trip End Date:	Add	Reservation	Car Car On Insurance	Cruise Cruise Service Fee	Tour Miscellaneous	
About this trip:	Reserv	rations					순문 [■	PAS
About this trip: General Info	Reserv No Res	rations servations.					<u>ት</u>	PAS
About this trip: General Info Travelers Reservations Invoices	No Res	vations servations.					<u></u> ↔ [PAS
About this trip: General Info Travelers Reservations Invoices Itinerary Report	No Res	rations servations.					<u></u> - - - - - - - - - - - - -	PAST
About this trip: General Info Travelers Reservations Invoices Itinerary Report Activities	No Res	vations servations.					<u> </u>	PAST
About this trip: General Info Travelers Reservations Invoices Itinerary Report Activities Attachments	Reserv No Res	rations servations.					℃ ₽ [PAS

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- Enter the first few letters of the vendor's name, then select from the drop-down list. The vendor must reside in the database. If it does not, the vendor will need to be added to the database.
- Enter the vendor's confirmation number or record locator # (if applicable).
- You do not have to enter a lot of details to do a simple invoice unless you have been instructed by your manager to do so.
- 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 \$5000.00. If you use the *Charge As* 'Per Person', it will multiply the Base+Taxes times the number entered in the *No. of Travelers* field.
- Enter a **Deposit Due Date** and **Final Payment Due Date**. Once the reservation is saved, you will have the ability to create Reminders. This is an important step so for following up and to ensure nothing falls through the cracks.
- Any remarks you enter in the *Itin/Invoice* remarks box will appear on the client's trip documents under the vendor's name. Any remarks entered in the *Agent Remarks* box will only be visible inside CBO.

Tour							
Date R	Reserved		Booking	Status			
4/9/21	1		Confir	ned			*
Vendo	r						
Delta	Vacations						
Confirr	mation Number		Record Loca	tor			
12BC	47L						
Bookin	ng Method						
Webs	site		[Booking	Method	-]	~	
Reserv	vation Status						
Confi	rmed		[Reservat	tion Sta	tus]	~	
Duratio	on		No. of Travel	ers			
5			4				
Invoice	ed Outside CB		Issued throug	h ARC			
No		~	No			~	
Domes	stic/International		Host Code				
Interr	national	~				~	
Trave	elers						
	hle Jr/Kenneth Alan						
	nee/Sucan Weable						
J0	nes/Susan weeble						
🛃 Ak	Die/Jon William						
🔽 Ab	ble/Abigail Ann						
Cost	Charge As:	Total		_	~		
1	Base	Тах		С	ommission		
Total:	4500.00	500.00	0.00	% 6	58.00	0.0	00

• Click *Save* at the bottom of the screen.

Payment Due Date		
Deposit Due Date:	Final Payment Due Date:	
04/15/2021	04/01/2022	12
Itin/Invoice Remarks		
Agent Remarks		
	C	SAVE CANCEL

- After saving, the Service Provider area appears for you to complete the reservation. A Service Provider is what the vendor sells (i.e., Princess Cruise Lines may sell the cruise, insurance, a tour, etc.). These all go in one reservation and are added one at time if you want them listed, under the Service Provider Area.
- On the *Service Provider Screen*, fill in a description of the tour (if this were a cruise reservation you could put the name of the ship) and the Trip *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. Any remarks entered here will appear directly under the tour description. Click *Save*.

Tour										
Service Provider										
Private Chichen Itza	[Service Provider] 💙									
Start Date	End Date									
06/01/2022	08/01/2022	12								
Tour Name										
Tour Description										
Address										
Address Line 1	Address Line 2	_								
City	State	Zip Code	Country							
Phone	FAX									
			Print on Invoice/Trip Proposal							
Travelers										
🖌 Able Jr/Kenneth Alan										
🖌 Jones/Susan Weeble										
Able/Jon William										
🗸 Able/Abigail Ann										
Itin/Invoice Remarks										
tour of the ruins.				▲						
The stunning Mayan city of <u>Chichen</u> It its fascinating archeology.	The stunning Mayan city of <u>Chiphen</u> Itza is a UNESCO World Heritage site, and also named one of the New Seven Wonders of the World. Take advantage of free time to explore the area and its fascinating archeology.									
Tour Includes:										
Entrance fee to archeological site of C	d-trip transportation in air-conditioned hichen Itza	van								
·				//						

- Continue adding Service Providers.
- Clicking Create Reminders (if you have put dates in the reservation) will automatically create a reminder for both the deposit due date and final payment due date that will appear on your daily to-do list in the Activity Manager.

Payment Due Date	e					+ CREATE REMINDERS
Deposit Due	e Date: 04/15/20)21				
Final Payment Due	e Date: 04/01/20)22				
Itin/Invoice Rema	rks					
Agent Remarks						
Service Provider					순 🖓	Add Service Provider 🗸
		Туре	Start Date	End Date	Service Provider	Code
View	Edit	Tour	6/1/22	6/1/22	Private Chichen Itza	5437773

Step 4. Generate an Invoice

• Click on Generate Invoice on the menu items to record a payment and issue an invoice.

Merge Options 🗸		Generate Invoice Tr	ip Proposal Note M	Mailer Reminders v
Res Card - Able Jr/Kenne	eth		Tour R	leservation $ imes$
Currency Trip Total USD Res Total: 5,000.00 Invoiced Total: 0.00 Balance: 5,000.00	Res Card No.: 78145207 Agent: Beth Vollmar Status: Active Res. Cycle: Booked Trip Name: Spring Break 2022 Trip Start Date: 06/01/22 Trip End Date: 06/01/22	Tour Reservation Vendor: Delta Vacations Start Date: 06/01/22 End Date: 06/01/22 Booking Status: Confirmed Reservation Status: Confirmed	Currency Fare: Base: Tax: Com: Net Fare:	USD 5,000.00 4,500.00 500.00 658.00 4,342.00

- Enter or select any invoice canned remarks you'd like to appear at the bottom of the invoice by clicking on *Remarks*.
- Select the correct *Form of Payment*.
- Be sure to select the correct *Travel Type* and *Submit To.*
- 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 Res Card reservation to fix any issues. 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 email.
- Go to <u>http://static.trams.com/tramslibrary/documentation/cbo/cbosmtpemailsetup.pdf</u> for directions on setting up CBO to email from the program.

			🕝 GE	NERATE INVOICE	Q PREVI	EW 🖉 CUSTO	MIZE FORMAT	<	CANCEL
Include Ref	funds	Issue [Date 04/09/	2021	12	1			
Thank you for **** Please No A \$75.00 admi	booking with ote: All prices inistration fee	Jet Set Trav are subject will apply to	vel. We app to change ar o all cancelle	reciate your busin 1d are based on a d bookings.	ess. availability. **** ▼				Invoice for Able Jr/Kenneth Branch 0 Locator No.
REMARKS	Trip Ba	alance Due	Date 04/01/	2022	12	1			Group
Invoice Payr	ment								
Form of Pay	ment		Check / C	C Number					
Credit Card	d	×	1234-XX	XX	-Se	lect Credit Card-	~		
1.0 🔽 Tou	r Reservatio	n							
Vendor	Delta Vacatio	ons		Confirmation No	12BC47L	Traveler Name			Travel Type
Traveler	Able Jr/Kenn	neth A		Depart Date	06/01/202	2 Start Ticket No			Submit to
Agent	Beth Vollmar	r		Return Date	06/01/202	2 End Ticket No			Supplier
Currency: USI)								
Sale 🔘	Base	Tax	Comm	Total Fare					
Total	4 500 00	500.00	658.00	5 000 00					
Not Invoiced	4,500.00	500.00	658.00	5,000.00					
This Invoice	4,500.00	500.00	658.00	5,000.00					
This invoice	4,300.00	1000.00	1000.00	3,000.00					
Agent									
Agent					Am	ount	%	Rate	
Beth Vollma	ar		[S	elect Agent]	♥ 0.0	00).00	MORE AGENTS [1]
Booking Pay	rment								
Form of Payment Check / CC Number			C Number						
Credit Card	b	~	1234-XX	XX	-Se	lect Credit Card-	~		
		<	🕜 GE	NERATE INVOICE	Q PREVI	EW 🔰 🖉 CUSTO	MIZE FORMAT		CANCEL



Mr. Kenneth Able Jr Susan Jones 4563 Maple Tree Ave Fargo, ND 48312 Travel the World, Inc. 123 Adams Street, Suite 2 Anywhere, ZY 01234 info@traveltheworldinc.com (999) 888-7777 Invoice No.: 1831 Invoice Date : 4/9/2021 Travel Consultant : Beth Vollmar Group No.: Page No.: |1

Tour Reservation Vendor : Delta Vacations Confirmation No. : 12BC47L Booking Status Duration : Confirmed : 5 No. of Travelers : 4 Start Date : 5/31/2022 End Date : 6/5/2022 Travelers : Able Jr/Kenneth Alan; Jones/Susan Weeble; Able/Jon William; Able/Abigail Ann 首目 Tour Private Chichen Itza Start Date End Date : 6/1/2022 : 6/1/2022 Hotel The Ritz-Carlton Cancun Check-in : 5/31/2022 3:00 PM Check-out : 6/5/2022 11:00 AM Room Type Smoking : Ocean View : Non-Smoking requested Bedding : King Base Tax Total Reservation Totals 4,500.00 500.00 \$ 5,000.00 S s 0.00 \$ Prior Invoiced Totals s 0.00 s 0.00 This Invoice Totals s 1.000.00 s 0.00 \$ 1,000.00 Paid By Credit Card 1234-XXXX: \$ (1,000.00)4,000.00 Balance due by Apr 01, 2022: \$

Thank you for booking with Jet Set Travel. We appreciate your business. **** Please Note: All prices are subject to change and are based on availability.
**** A \$75.00 administration fee will apply to all cancelled bookings. www.clientbaseonline.com

Step 5. Update Marketing

Important! Go back into the client Profile > Marketing link and make sure to check off any marketing codes you
learned when doing the invoice. This is for marketing purposes and especially important if you belong to a
consortium.

Using ClientBase to Create a Res Card with a Reminder to Follow-up for a Trip Inquiry

- 1. For every client trip, find the client profile. If no profile exists, create a new one.
- 2. In a brand new client profile, make sure the profile contains the following info: Full name, phone and email. (If this client books the trip, you can go in later to put in Address, Family Members, Credit Card info., etc.)
- 3. Click the Res Card icon in the menu bar:

Merge Options 👻		Create New: F	PNR Res Card	Live Connect	Note Mailer	Reminder
Leisure - Allison/Vicki					General Inf	ō X
Vicki Allison 507 Esplanade , Unit C Redondo Beach, CA 90277	Home: +1 (213) 738-9219 E-mail: vaison@earthlink.net	Marketing Codes: 16 Primary Traveler: Allison Groups:	ı/Victoria	Primary Agent: Created: Salutation: Interface ID: Profile No.:	Beth Vollmar 3/18/13 Vicki 2137389219 17393715	□ り 謹

- 4. In the new Res Card, choose Under Consideration as the Reservation Cycle (always use drop-downs if available), enter a meaningful Trip Name (used to find Res Card in profile or Res Card Manager), and Add Region and Destination (for marketing purposes). Start typing all your notes for the trip in the Agent Remarks tab.
- 5. Click Save.

Res Card		
Agent		
Beth Vollmar	[Select Agent]	\checkmark
Create Date		
4/9/21	12	
Branch		
[0]Jet Set Travel		\checkmark
Status		
Active	•	
Reservation Cycle		
Under Consideration	-Reservation Cycle Sel-	\checkmark
Marketing Source		
	-Marketing Source-	\checkmark
Group		
	-Group Sel-	\checkmark
Region		
United States	-Region Sel-	~
Destination		
Hawaii		
Prepared for		
[17393715] Allison/Vicki		
Trip Name	Locator No.	
Hawaii		
Trip Start Date	Trip End Date	
	12	⁷⁰⁰⁰ 12
Agent Remarks		
35th wedding anniversary; quoted \$3100/pp		

6. Click *Reminders* in tool bar and *Create Single Reminder* to follow up with customer. This will show up on your to-do list for you to handle:



7. Important! Go back into the client Profile/Marketing link and make sure to check off any marketing codes you learned when doing the trip inquiry.