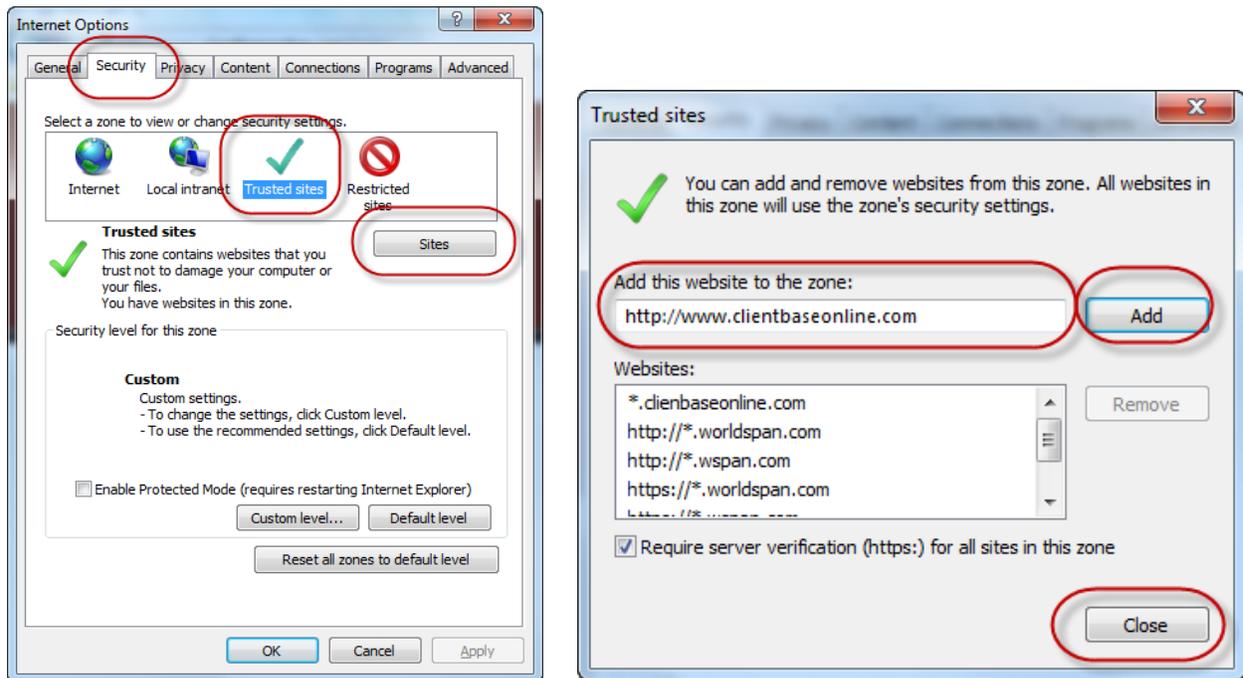


Step 1. Mark www.clientbaseonline.com as a trusted site in Internet Explorer

- 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**.



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 ▾ Create New: Profile ▾ Res Card Note Mailer Reminder Reports ▾

Find Profiles by...

Profile Type ▾ Leisure ▾

Profile Name/Company ▾ Able Jr/Kenneth

FIND RESET GO TO ADVANCED SEARCH ▶

✓ COUNT First | Previous | Next | Select Columns | Sort by Columns | Saved Searches

	Profile Type	Name ^	Interface ID	City	State	Zip Code	Communication Entry
View ⚙️	L	Able Jr/Kenneth	4195553152	Fargo	ND	48312	+1 (419) 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/Kenneth Travelers ✕

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	Marketing Codes: 28 Primary Traveler: Able Jr/Kenneth Alan Groups: STANFORD ALUMNI	Primary Agent: Beth Vollmar Created: 2/12/12 Salutation: Mr. Able Jr Interface ID: 4195553152 Profile No.: 5438290
--	--	--	--

Remarks: VIP - Client since 2001

About Able Jr/Kenneth

General Info
 Communications
 Remarks
 Marketing Codes
Travelers
 Activities
 Credit Cards

Travelers - Summary [Switch to Detail View](#) SEARCH **ADD**

	Name	Relationship	Primary	Age	Birth Date	Primary Phone	Primary Email	Primary Fax	Pr
View ⚙️	Able Jr/Kenneth Alan	Primary	Y	60	04/29/1960	+1 (419) 555-3152	ken@example.com		
View ⚙️	Jones/Susan Weeble	Spouse	N	59	09/22/1961		sjones@yahoo.com		
View ⚙️	Able/Jon William	Son	N	25	11/04/1995				
View ⚙️	Able/Abigail Ann	Daughter	N	31	01/02/1990				

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.

Leisure - Able Jr/Kenneth

Credit Cards ✕

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

Marketing Codes: 28
Primary Traveler: Able Jr/Kenneth Alan
Groups: STANFORD ALUMNI

Primary Agent: Beth Vollmar
Created: 2/12/12
Salutation: Mr. Able Jr
Interface ID: 4195553152
Profile No.: 5438290



Remarks: VIP - Client since 2001

About Able Jr/Kenneth

- General Info
- Communications
- Remarks
- Marketing Codes
- Travelers
- Activities
- Credit Cards**
- Loyalty Programs

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

+ ADD

	Card Type	Traveler	Card Code	Number	Exp Date	Name on Card	Card Description	Issue
Edit	Credit Card		VI	1234-XXXX	12/31/22		Visa	
Edit	Credit Card	Able Jr/Kenneth Alan	VI	VI 44-XXXX-1111	3/31/21	Kenneth Alan Able	Visa	
Edit	Credit Card	Able Jr/Kenneth Alan	AX	AX 37-XXXX-2004	7/1/23	Kenneth Alan Able Jr	American Express	

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/Kenneth

Res Cards ✕

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

Marketing Codes: 28
Primary Traveler: Able Jr/Kenneth Alan
Groups: STANFORD ALUMNI

Primary Agent: Beth Vollmar
Created: 2/12/12
Salutation: Mr. Able Jr
Interface ID: 4195553152
Profile No.: 5438290

Remarks: VIP - Client since 2001

About Able Jr/Kenneth

- General Info
- Communications
- Remarks
- Marketing Codes
- Travelers
- Activities
- Credit Cards
- Loyalty Programs
- Res Cards**

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

Filters

All Res Cards Active Departed Cancelled

	Res Card No.	Status	Trip Locator	Trip Name	Create Date	Region	Trip Sou
View ⚙️	77591416	Active		Anniversary Trip 2021	11/4/20	Bermuda & Caribbean	
View ⚙️	77413391	Active		Trip Name	9/9/20	Bermuda & Caribbean	Direct M
View ⚙️	76385222	Active		African Safari	3/16/20	Africa	
View ⚙️	73380194	Active		Cancun Lead	11/14/19	Bermuda & Caribbean	Internet
View ⚙️	73345514	Active		DLV	2/28/19		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

Create Date
 

Branch

Status

Reservation Cycle

Marketing Source

Group

Region

Destination

Prepared for

Trip Name **Locator No.**

Trip Start Date  **Trip End Date** 

- 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**.

- o 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/Kenneth Edit Traveler

Res Card Totals

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:

SAVE CANCEL

Travelers ADD TRAVELER EDIT

	Name	Last Name	First Name	Middle Name	Type	Primary
<input checked="" type="checkbox"/>	Able Jr/Kenneth Alan	Able Jr	Kenneth	Alan	Adult	Y
<input checked="" type="checkbox"/>	Jones/Susan Weeble	Jones	Susan	Weeble	Adult	N
<input checked="" type="checkbox"/>	Able/Jon William	Able	Jon	William	Adult	N
<input checked="" type="checkbox"/>	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.

Merge Options Generate Invoice Trip Proposal PNR Live Connect Note Mailer Reminders

Res Card - Able Jr/Kenneth Reservations

Res Card Totals

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:

Add Reservation

Air

Hotel

Car

Cruise

Tour

Rail

Transportation

Insurance

Service Fee

Miscellaneous

About this trip: Reservations ↑ ↓ PASTE

No Reservations.

General Info
 Travelers
Reservations
 Invoices
 Itinerary Report
 Activities
 Attachments
 More Fields

Close Res Card

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

Tour
LIVE CONNECT

Date Reserved	Booking Status	Promo ID
<input type="text" value="4/9/21"/>	<input type="text" value="Confirmed"/>	<input type="text"/>

Vendor	
<input type="text" value="Delta Vacations"/>	
Confirmation Number	Record Locator
<input type="text" value="12BC47L"/>	<input type="text"/>
Booking Method	
<input type="text" value="Website"/>	<input type="text" value="--Booking Method--"/>
Reservation Status	
<input type="text" value="Confirmed"/>	<input type="text" value="--Reservation Status--"/>
Duration	No. of Travelers
<input type="text" value="5"/>	<input type="text" value="4"/>
Invoiced Outside CB	Issued through ARC
<input type="text" value="No"/>	<input type="text" value="No"/>
Domestic/International	Host Code
<input type="text" value="International"/>	<input type="text"/>

Travelers

- Able Jr/Kenneth Alan
- Jones/Susan Weeble
- Able/Jon William
- Able/Abigail Ann

Cost	Charge As: <input type="text" value="Total"/>	ITEMIZATION
-------------	--	-------------

Base	Tax	Commission	
Total: <input type="text" value="4500.00"/>	<input type="text" value="500.00"/>	<input type="text" value="0.00"/>	<input type="text" value="658.00"/>
		%	<input type="text" value="0.00"/>
			%

Payment Due Date

Deposit Due Date: 04/15/2021  Final Payment Due Date: 04/01/2022 

Itin/Invoice Remarks

Agent Remarks

 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
 [-- Service Provider --]

Start Date: 06/01/2022 End Date: 06/01/2022

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 Chichen 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:
 Pick up at your hotel and private round-trip transportation in air-conditioned van
 Entrance fee to archeological site of Chichen Itza

- 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 + CREATE REMINDERS

Deposit Due Date: 04/15/2021
 Final Payment Due Date: 04/01/2022

Itin/Invoice Remarks

Agent Remarks

Service Provider ↑ ↓ [-- Add Service Provider --]

		Type	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.

The screenshot shows a software interface with a dark header bar containing a menu: Merge Options, Generate Invoice (circled in red), Trip Proposal, Note, Mailer, and Reminders. Below the header is a section titled 'Res Card - Able Jr/Kenneth' with a 'Tour Reservation' close button. The main content area is divided into three columns:

Res Card Totals		Res Card No.: 78145207		Tour Reservation	
Currency	Trip Total USD	Agent: Beth Vollmar		Vendor: Delta Vacations	Currency USD
Res Total:	5,000.00	Status: Active		Start Date: 06/01/22	Fare: 5,000.00
Invoiced Total:	0.00	Res. Cycle: Booked		End Date: 06/01/22	Base: 4,500.00
Balance:	5,000.00	Trip Name: Spring Break 2022		Booking Status: Confirmed	Tax: 500.00
		Trip Start Date: 06/01/22		Reservation Status: Confirmed	Com: 658.00
		Trip End Date: 06/01/22			Net Fare: 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 <http://static.trams.com/tramslibrary/documentation/cbo/cbosmtpemailsetup.pdf> for directions on setting up CBO to email from the program.

GENERATE INVOICE PREVIEW CUSTOMIZE FORMAT

Include Refunds Issue Date 04/09/2021

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.

Invoice for	Able Jr/Kenneth
Branch	0
Locator No.	
Group	

REMARKS Trip Balance Due Date 04/01/2022

Invoice Payment	
Form of Payment	Check / CC Number
Credit Card	1234-XXXX -Select Credit Card-

1.0 Tour Reservation

Vendor	Delta Vacations	Confirmation No	12BC47L	Traveler Name	
Traveler	Able Jr/Kenneth A...	Depart Date	06/01/2022	Start Ticket No	
Agent	Beth Vollmar	Return Date	06/01/2022	End Ticket No	

Travel Type	Tour-Dpst
Submit to	Supplier

Currency: USD

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

Agent			
Agent	[--- Select Agent ---]	Amount	% Rate
Beth Vollmar		0.00	0.00
<input type="button" value="MORE AGENTS [1]"/>			

Booking Payment	
Form of Payment	Check / CC Number
Credit Card	1234-XXXX -Select Credit Card-

GENERATE INVOICE PREVIEW CUSTOMIZE FORMAT

Leisure - Allison/Vicki		General Info ✕	
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/Victoria ... Groups:	Primary Agent: Beth Vollmar Created: 3/18/13 Salutation: Vicki Interface ID: 2137389219 Profile No.: 17393715

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 --]

Create Date

4/9/21 

Branch

[0]Jet Set Travel

Status

Active

Reservation Cycle

Under Consideration -Reservation Cycle Sel-

Marketing Source

-Marketing Source-

Group

-Group Sel-

Region

United States -Region Sel-

Destination

Hawaii

Prepared for

[17393715] Allison/Vicki ...

Trip Name

Hawaii

Locator No.

Trip Start Date



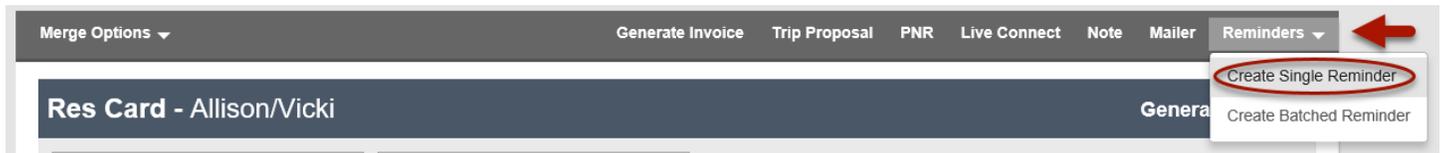
Trip End Date



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.