

ClientBase

Sabre.

***ClientBase Online
ClientBase Browser***

Overview

November, 2015

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Welcome to ClientBase Online



This *ClientBase Online* (it is the same product as *ClientBase Browser*) Overview is designed to provide agents with an easy, quick reference to some of the most commonly used features in *ClientBase Online*. This is not the *ClientBase Online* manual. The *ClientBase Online* manual, which has been designed to provide detailed instruction for front-line agents, can be accessed and printed out from our website (using Adobe Acrobat Reader) at www.sabretravelnetwork.com/trams, click on Training|Documentation|ClientBase Online. You can also print out extra copies of this Overview from that same area. The electronic *ClientBase Online* Manual file has also been indexed and made available within the *ClientBase Online* program. By clicking **Help**, and selecting items in the *Index* or the *Table of Contents*, you get answers to your questions anytime while working in the program.

Trams and ClientBase Products and Services also offers a series of Recorded Trainings and 1-hour WebEx classes for users of ClientBase Online. These can be accessed by going to www.sabretravelnetwork.com/trams and clicking on the *Training* link.

We provide unlimited technical support (if you have chosen that option) by calling our team of highly trained support personnel at 310-641-8726 (Press 2), or e-mailing a question to support@trams.com. Let's face it, everyone learns in different ways and at different paces. Here at *Trams and ClientBase Product and Services*, we provide you with a multitude of ways to learn *ClientBase Online* because the sooner you begin reaping the benefits of *ClientBase Online*, the sooner you'll be SELLING MORE TRAVEL. We're sure of it!

IMPORTANT NOTE: The manual, Overview and help files for the *ClientBase Online* are updated automatically with every *ClientBase Online* release to include any enhancements. Many of the features in ClientBase Online and outlined in this document can be customized by going to **Tools|Agency Settings**. Consult the help files inside the ClientBase Online program for complete directions on setup.



NOTES:

Getting to Know ClientBase Online

ClientBase
Online

The first screen to appear after logging on is the main screen.

Browser Items

File Managers

Menu Bar

Search Filters

Navigation Bar

Search Results

	Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry
View	L	Sharp/Janet	324564654	Manhattan Beach	CA	90266	+2 (213) 842-8743
View	L	Tiggs/Hazel	AUTOMATION				+1 (213) 894-8904
View	L	McGrath/Michael	45454545	Manhattan Beach	CA	90266	+1 (213) 721-3998

At the heart of *ClientBase Online* is the ability to locate, modify and use the information within your database. Your agency database contains a wealth of knowledge on past and present customer and vendor relationships. Being able to easily access and use this valuable information to maintain existing relationships and build new ones, may very well establish the future success of your agency. *ClientBase Online* is the tool of choice to easily access, manage, update and use this valuable database information. We'll show you how!

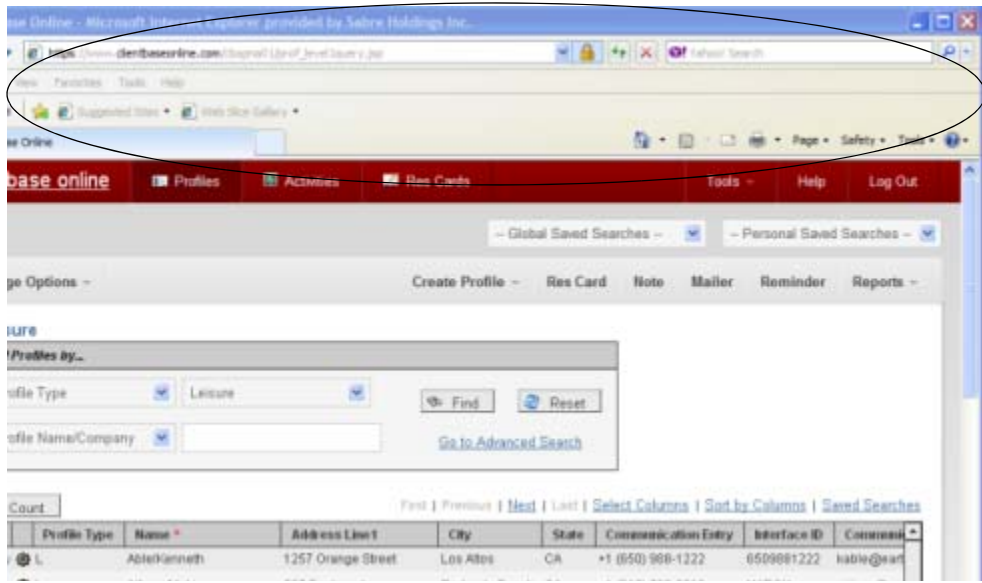
Layout of the ClientBase Main Screen:

To become better acquainted with the *ClientBase Online* features, it may be helpful to think of the screen as being divided into 6 sections:

1. Browser Items
2. File Manager
3. Menu Bar
4. Search Filters
5. Navigation Bar

6. Search Results

1. Meet the Online Items:



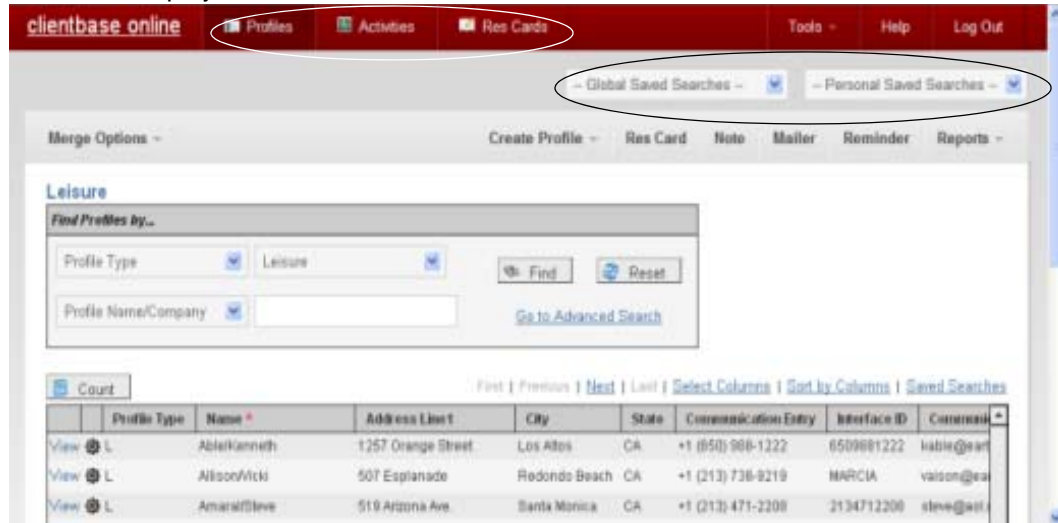
Located at the top of the screen are your browser Items. Depending on what browser you are using, these items differ. They usually include a browser File Menu, Toolbar, and an Address area.

2. Meet the File Manager:

Located at the top of the main screen is the *ClientBase Online* File Manager. To assist you with managing a rather elaborate database of information, the File Manager is divided into 3 Links: (1) *Profiles* allow you to easily manage your profile data (Leisure, Corporate, Vendor, Agent and Other) and provides search filters and results listed by Profile; (2) *Activities* allow you to easily manage your Activity data (Notes, Reminders, and Mailers) and provides search filters and results listed by the Activity; and (3) *Res Cards* allow you to easily manage your Res Card data and provides search filters and results listed by Res Card data.

The file links listed within the File Manager in the Global Saved Searches or the Personal Saved Searches drop-down menus represent a set of search filters and column arrangements that have been

saved and named as links. With a single click of the mouse, these links automatically complete your Search Filters and display Search Results.



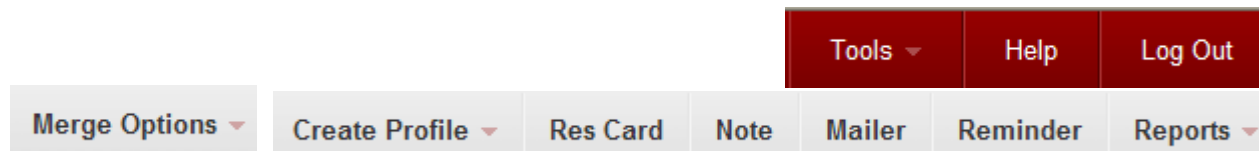
File Manager links

Global Saved & Personal Saved Search Links in Profile Manager

Although the system comes with a default set of links within each File Manager, these links are completely user-definable. To select a folder from the File Manager, simply click on the folder you want to use from the Global Saved or Personal Saved drop-down Search menus, and the system automatically completes the search filters, sifts through the data, and displays the outcome in the Search Results screen below.

3. Menu Bar

The menu bar is made up of links to frequently used features. Directly above the menu bar are the *Tools*, *Help files*, and *Log Out* options.



MERGE OPTIONS:

Merge to Doc: Launch a Document Template from the results of a search into Wordpad, MS Word, Open Office, etc. to view, edit and print the document with all fields merged. You can also Merge to Doc inside a client profile.

Merge to E-mail: Launch an e-mail from the results of a search.

Merge to File: Export the results of a search for use in other applications such as MS Word, Excel, etc. to run labels or reports, and print from your local workstation. Arrange and sort columns as desired before printing.

Print: Print the results of the search from Profiles, Activities, or Res Cards.

CREATE PROFILE OPTIONS: Create a new Leisure/Corporate/Vendor/Service Provider/Agent or Other profile.

REPORTS: From the results of a simple or advanced search, create a report.

TOOLS:

Page History: The page history area "remembers" the last places you have navigated to in the program. To quickly hop back into a recently visited area, simply click on that link.

Settings: Customize parts of the program.

Mask Credit Card Number: Remove (purge) credit card information for Payments, Booking CommTrack CC Numbers and Reservation Deposit CC Numbers no longer of use.

Import Profile: Bring in a .txt or ASCII file from another program to populate profiles.

Case Converter: Convert cases of some of the program fields.

My Login: Customize areas of your own ClientBase Online program.

About: Clicking About provides further details on *ClientBase* configuration.

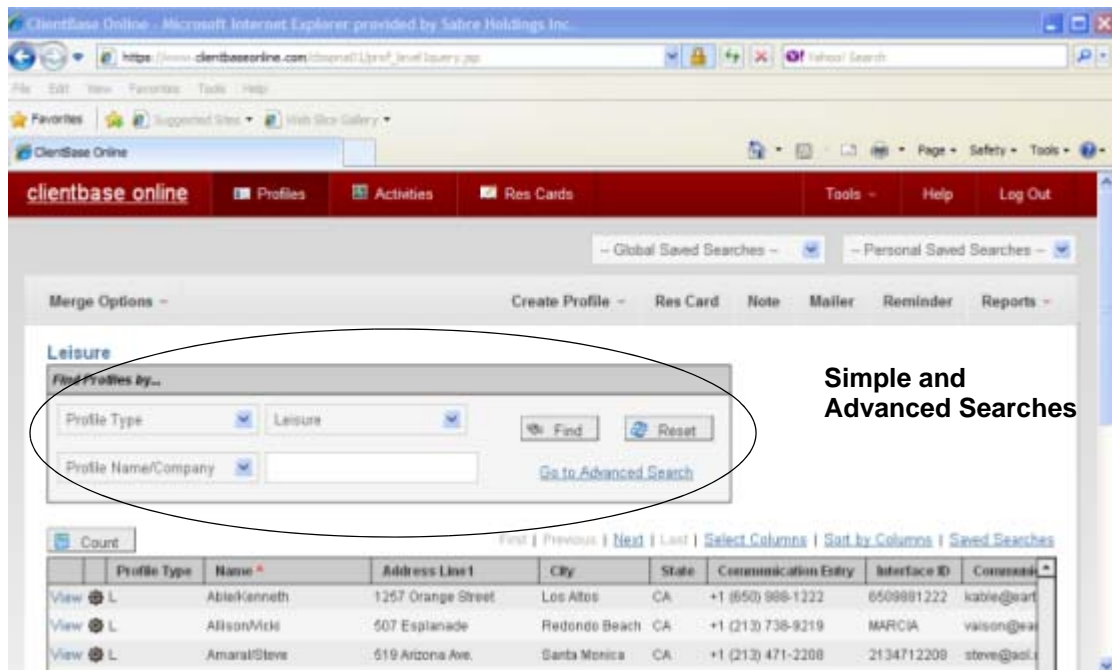
HELP: Provides on-line program topics that explain different areas of the program.

LOG OUT: Returns user to the *Sign In* area.

Meet the Search Filters

Your database holds a wealth of information on your customers, marketing activities, reservations, vendors, and much more. This information is of little value unless you can quickly and easily access the data. The Search feature puts the information held in your database at your fingertips, by providing the filters to sift through the data and quickly find what you need.

Do simple or complex search searches based on the selected search filters.



Simple and Advanced Searches

Depending in which of the File Managers you are working (Profiles, Activities, or Res Cards), the search filters vary, as do the type of results displayed. Since Activities and Res Cards are actually part of a profile record, Profiles allow you to search for profiles using any profile fields as search criteria,

including Activity and Res Card fields. Activities allow you to search for activities using any activity fields as search criteria. Res Cards allows you to search for Res Cards using any Res Card fields as search criteria. Below is a description of the searches included in the Profile Manager.

Simple Search: This level allows you to quickly locate a profile or a group of profiles by simply completing one or two search filters. The drop-down field to the left identifies what to search by, and the blank field to the right allows you to type in what to search for. If both fields are used in this search, then the results will match both criteria, not either/or. This means the search filters are strung together with an “and”, not an “or”. For example, if you are looking for a Leisure Client named John Smith, then set the first field to Profile Type and select *Leisure* from the drop-down menu, and set the second field to *Name* and enter “smi”. Click *Find*. All Leisure Clients with the Last Name starting with “smi” appear in the search results. Click *View* in front of Harry Ford’s entry to enter his profile; or click the action menu icon (gear).

Find Profiles by...

Profile Type ▼ Leisure ▼ Find Reset

Profile Name/Company ▼ smi [Go to Advanced Search](#)

Count First | Previous | Next | Last | [Select C](#)

	Profile Type	Name ^	Address Line1	City	State	Communication Entry	Int
View	L	Smith/Alan	185				
View	L	Smith/Gladys	1234 Main Street	Los Angeles	CA	+1 (213) 641-8727	
View	L	Smith/John	28 10th.Street	Los Angeles	CA	+1 (310) 444-1234	310

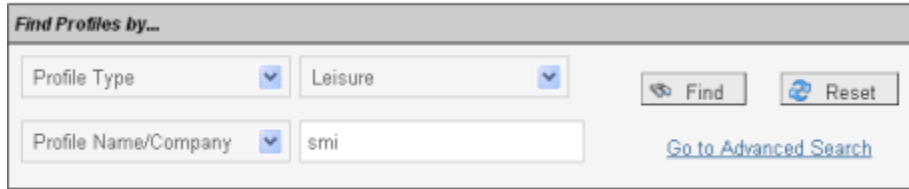
Profile Record: 9948153

[View](#) [Delete](#) [View Activities](#) [Merge to PNR](#) [Merge to Document](#) [Merge to E-mail](#) [Live Connect](#)
[New Res Card](#) [New Note](#) [New Mailer](#) [New Reminder](#)

Advanced Search: Advanced Search provides additional filters to more narrowly define your search. Search filters are selected by clicking on *Enter Date to Search by* and then completing as many of the search criteria fields as desired. Each field selected is strung together with an “and” which more narrowly defines the search. For example, if you have just received a hot cruise special to Europe and want to see a list of all past and potential cruise clients interested in Europe and living in the 90045 zip code, put the following filters in your search. Enter “90045” in the *Zip Code* field; check off “Cruise” under *Marketing/What Type*; “Europe” under *Marketing/Where*. Now you have selected the filters to search your database for all leisure clients in the 90045 zip code area who expressed an interest in cruising and want to go to Europe. When you click *OK*, all clients in your database meeting the selection criteria are displayed in the Search Results. You are now ready to print your labels and send the mailing.

5. Meet the Navigation Bar

The Navigation Bar provides a means to jump to various profiles in the search results screen by using *First*, *Previous*, *Next*, and *Last*. Also on this bar are *Select Columns* and *Sort by Columns*:



Find Profiles by...

Profile Type: Leisure

Profile Name/Company: smi

Find Reset

[Go to Advanced Search](#)

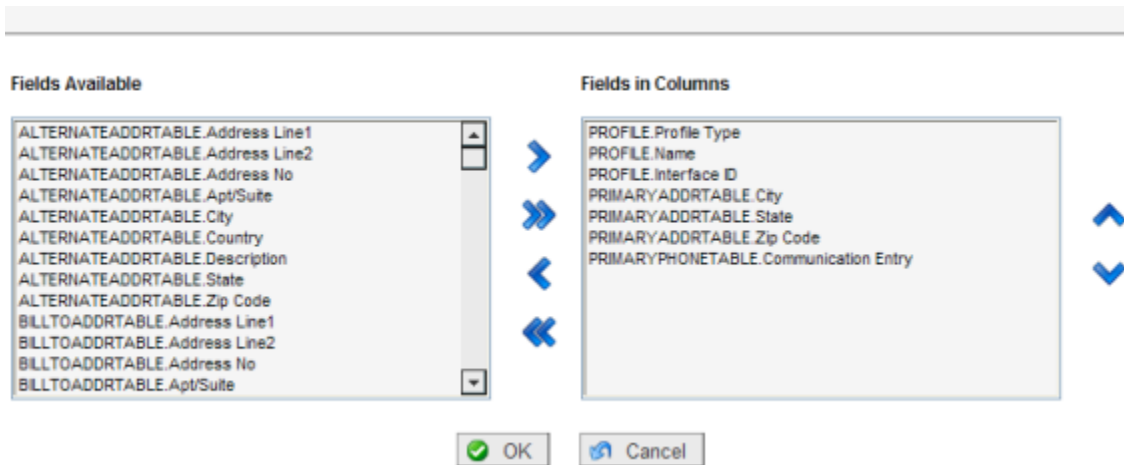
Count

NAVIGATON BAR

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

Select Columns

Click *Select Columns* to choose which columns you want displayed in the Search Results screen.



Fields Available

- ALTERNATEADDRTABLE.Address Line1
- ALTERNATEADDRTABLE.Address Line2
- ALTERNATEADDRTABLE.Address No
- ALTERNATEADDRTABLE.Apt/Suite
- ALTERNATEADDRTABLE.City
- ALTERNATEADDRTABLE.Country
- ALTERNATEADDRTABLE.Description
- ALTERNATEADDRTABLE.State
- ALTERNATEADDRTABLE.Zip Code
- BLLTOADDRTABLE.Address Line1
- BLLTOADDRTABLE.Address Line2
- BLLTOADDRTABLE.Address No
- BLLTOADDRTABLE.Apt/Suite

Fields in Columns

- PROFILE.Profile Type
- PROFILE.Name
- PROFILE.Interface ID
- PRIMARYADDRTABLE.City
- PRIMARYADDRTABLE.State
- PRIMARYADDRTABLE.Zip Code
- PRIMARYPHONETABLE.Communication Entry

OK Cancel

To change a column, move the highlighted column over to the other side by using the > or < arrow. By using the shift key and mouse, select as many consecutive entries as you want to move; by using the control key and your mouse, select non-consecutive entries to move. Use the >> or << arrows to move all columns at one time over to the other side. Use the up and down **arrow** buttons to order your selections. Click *OK* to save, and *Cancel* to abort.

Sort by Columns

Click *Sort by Columns* to sort columns in the search results screen. Sort by up to 3 columns in ascending or descending order, and click *OK* to save, or *Cancel* to abort.

Sort up to 3 columns in ascending or descending order.

Saved Searches

Click *Saved Queries* to *View* an existing *Global* or *Personal* saved search. You are also able to *Replace*, *Rename*, or *Delete* a saved search or create a new brand new one.

Global Saved Searches				
Agent	View	Replace with Current Search	Rename	Delete
All Profiles	View	Replace with Current Search	Rename	Delete
Cabo San Lucas Hotel Inspections	View	Replace with Current Search	Rename	Delete
Corporate	View	Replace with Current Search	Rename	Delete
Cruise Lines	View	Replace with Current Search	Rename	Delete
Family Members	View	Replace with Current Search	Rename	Delete
Honolulu Hotel Inspections	View	Replace with Current Search	Rename	Delete
Leisure	View	Replace with Current Search	Rename	Delete
Live Connect Cruise Lines	View	Replace with Current Search	Rename	Delete
Live Connect Tour Operators	View	Replace with Current Search	Rename	Delete
Other	View	Replace with Current Search	Rename	Delete
Preferred Cruise Lines	View	Replace with Current Search	Rename	Delete
Service Providers	View	Replace with Current Search	Rename	Delete
Tour Operators	View	Replace with Current Search	Rename	Delete
Vendor	View	Replace with Current Search	Rename	Delete
Personal Saved Searches				
Incomplete profiles	View	Replace with Current Search	Rename	Delete
Last Month's New Profiles	View	Replace with Current Search	Rename	Delete
My Leisure Clients	View	Replace with Current Search	Rename	Delete
My deluxe cruisers	View	Replace with Current Search	Rename	Delete
New clients - last 7 days	View	Replace with Current Search	Rename	Delete
Passport Expiration	View	Replace with Current Search	Rename	Delete
haven't traveled in last year	View	Replace with Current Search	Rename	Delete

[Save Current](#) [Close](#)

6. Meet the Search Results

Search Results display the results of a search based on the criteria entered into the search filters. Only those records that meet the criteria of the search filters are included in the Search Results. While working Profiles, all search results are displayed by profile (Leisure, Corporate, Vendor, Agent and Other). While working in Activities, all search results are displayed by Activity (Notes, Reminders and Mailers). While working Res Cards, all search results are displayed by Res Cards.

In the example below, the Search Filters have been set to Profile Type of *Leisure* and Last Name starting with “smi”. The Search Results displays all Leisure clients in the database whose last name begins with “smi” after you click *Find*. To select a record appearing within the results screen, click *View* or the action menu icon (gear) next to the entry, and the profile details appear.

The screenshot shows a search interface with the following components:

- Search Filters:** Profile Type (Leisure), Profile Name/Company (smi), Find button, Reset button, and a link to Go to Advanced Search.
- Table:** A table with columns: Profile Type, Name, Address Line 1, City, State, and Communication Entry. It lists several records for the Smith family.
- Navigation:** A 'Count' button and navigation links: First, Previous, Next, Last, and a partially visible 'Select' link.

	Profile Type	Name ^	Address Line 1	City	State	Communication Entry
View ⚙️	L	Smith/Alan	185			
View ⚙️	L	Smith/Gladys	1234 Main Street	Los Angeles	CA	+1 (213) 641-8727
View ⚙️	L	Smith/John	28 10th. Street	Los Angeles	CA	+1 (310) 444-1234
View ⚙️	L	Smith/Linda	SEARCH RESULTS		CA	
View ⚙️	L	Smith/Teri				
View ⚙️	L	Smith/Tim	300 S. Sepulveda	Manhattan Beach	CA	+1 (213) 228-7219

In this next example, we are working in Activities and have entered our desired search filters. The Search Results displays all activities in the database that are Open Reminders for agent Sharon. To select a record appearing within the results screen, click *View* or the action menu icon (gear) next to the entry and the activity details appear. To view the profile an activity was created for, click *Go To Profile* in the activity. *ClientBase Online* allows you to easily move between the activities in your results screen and the profiles for which the activities were created.

Review

When there is work to be done in *ClientBase Online*, the Main Screen is the place to go: Retrieve profiles, create new profiles, manage or create marketing activities (Notes, Mailers, Reminders), and manage or create Res Cards.

Three Managers at Your Service



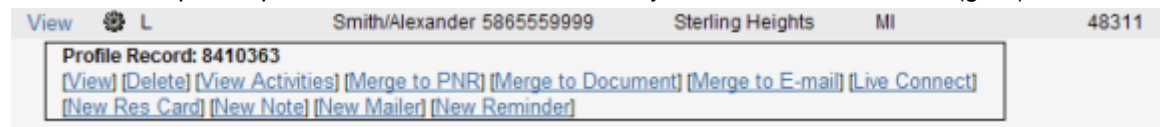
Located on the top of the main screen is the File Manager and three links - Profiles, Activities, and Res Cards. Profiles, Activities, and Res Cards represent different views of your entire database (*ClientBase Online* is really broken into 3 mini-databases that organize and maintain a portion of the data held within the program database.) The information in these areas can be managed, updated and filtered with the search outcome displayed on the Search Results. Whether you want to search your database of Profiles, Activities, or Res Cards determines which of the Managers to select.

1. Profiles

Clicking Profiles allow you to search and manage your database of profiles, and provides you with quick access to vital information about clients, vendors, agents and other profiles. From this area, *locate*, *add*, *modify* or *delete* profile records.

When opening Profiles, click on a Global or Personal Saved Searches folder, which contains a stored set of search fields, or use Simple or Advanced Search fields to enter a custom search. The Search Results provides easy access to profile information such as address and communication information, customer preferences, family member details, activities, travel history, attachments, Res Cards, free flow remarks, and more.

To retrieve a specific profile, click *View* next to the entry or the action menu icon (gear).



This icon is displayed to the right of *View* and is listed for each record in the search. It has been designed to allow you to perform a variety of actions for that one record without having to open the record first - saving you a few extra clicks of the mouse. Click the icon and the following options appear:

From Profiles Search Results:

Edit (Leisure, Corporate, Vendor, Agent or Other): Takes you directly to the *Edit Additional Info* section of the selected profile for modifying without having to first view the profile and selecting *Edit Additional Info*.

View Activities: Take you directly to the activities tab for the selected profile without having to open the profile first.

Merge to PNR: Activates *Merge to PNR* for the selected profile without having to open the profile first.

Merge to Document: Activates *Merge to Document Template* for the selected profile.

Merge to E-mail: Activates *Merge to E-mail* for the selected profile.

Live Connect: Activates a *Live Connect* screen to enter your Vendor and Live Connect Provider and launches you into the Live Connect booking site without having to create a new res card first. Upon importing the reservation, a brand new res card with all the imported data therein is created.

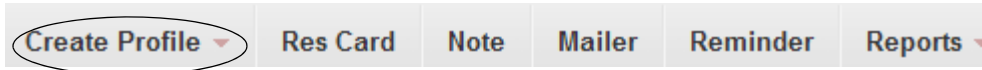
New Res Card: Activates *Res Card* creation for the selected profile without having to enter a profile first.

New Note: Activates *Note* creation screen for the selected profile.

New Mailer: Activates *Mailer* creation screen for the selected profile.

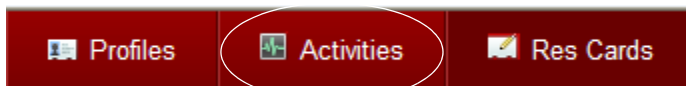
New Reminder: Activates *Reminder* creation screen for the selected profile.

A new profile can be created any time by clicking *Profile* on the menu bar, and clicking the *Profile Type* you want to create from the drop-down menu.



2. Activities

Accessing Activities allows you to search and manage your database of activities - providing quick and easy access to all Reminders, Notes and Mailers. This is a powerful information and organizational manager for agents, giving you the ability to monitor a multitude of tasks and marketing activities.



Find Activities by...

Login Name: Select:

From Date: To Date: [Go to Advanced Search](#)

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

	Type	Priority ^	Login/Created Name	Name	Activity DateTime	Subject
View	R	High	SHARON	Rosen/Steve	04/29/13	Trip Inquiry Fo
View	R	High	SHARON	Richards/Mary	4/29/13 9:30 AM	Touch Base
View	R	High	SHARON	Sharon Meyer	4/29/13 10:00 AM	Medical
View	R	High	SHARON	Larson/Wayne	04/29/13	Trip Planning
View	R	High	SHARON	Tri-Star Productions	04/29/13	Client Meeting

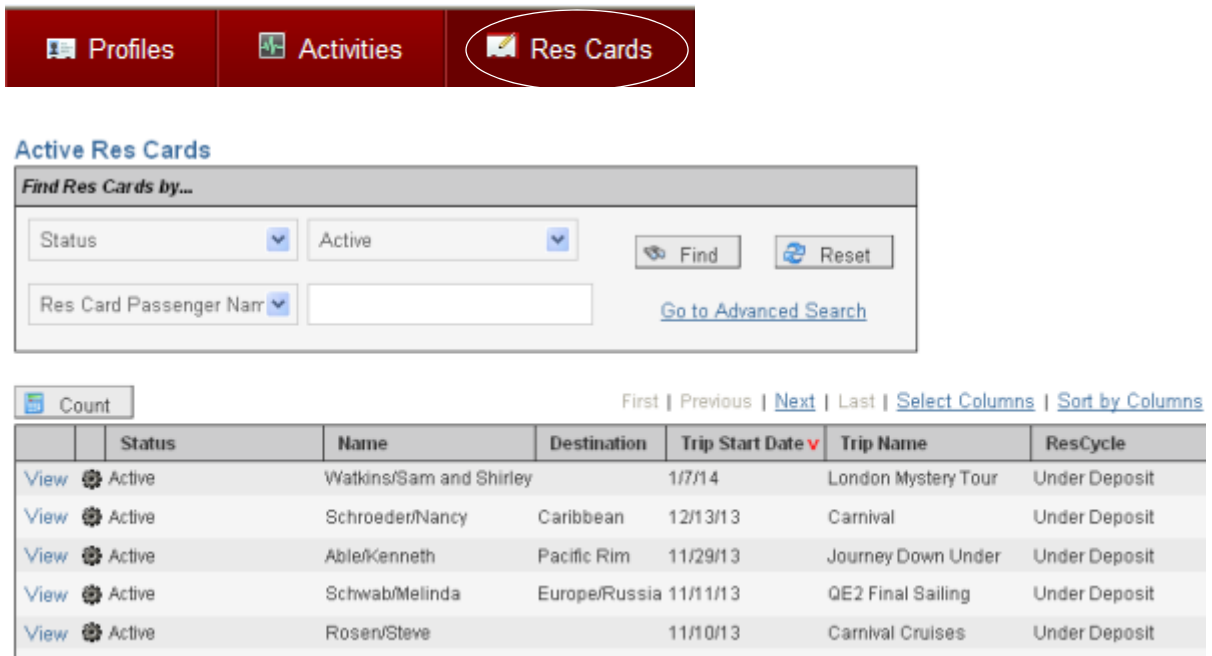
Stored links and search fields for Activities are available for selection from the drop-down *Global Saved* and *Personal Saved* links as well as the Simple or Advanced Search areas to enter a custom Query. From this area, view a “To-Do” list and *locate*, *add*, *modify* or *delete* Notes, Reminders and Mailers. Upon entering Activities and refreshing the search, by default the system queries open Reminders for the current User Login, thus providing an instant detailed “To-Do” list.

To retrieve a specific activity, click *View* or the action menu icon (gear) next to the entry. To easily move into the profile record for an activity appearing in the results screen, click *Go To Profile*. This allows you not only to search your database of activities, but also easily move between the results and the profile details for which they were created.

3. Res Cards

Res Cards replace the paper index Res Card and file folders that have for years cluttered agencies. In the past, agents entered details of many leisure type reservations (client information, confirmation numbers, itineraries, vendor information, remarks, etc.) on cards. Agents kept these cards somewhere on their desk or somewhere in the file. That “somewhere” translated into precious time spent searching for Res Cards, especially when the booking agent was not available and another agent had to locate the card. With Res Cards, you now have the tool to organize and maintain reservation information in a central database. If agents get in the habit when talking with clients or vendor/service providers of entering the details directly into the Res Card rather than jotting the notes on paper, when a customer calls, any agent is able to answer questions or update information by accessing the customer’s Res Card.

Accessing Res Cards allow you to search and manage your database of Res Cards.



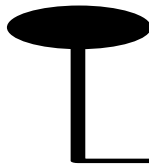
The screenshot shows the Res Cards interface. At the top, there are three navigation tabs: Profiles, Activities, and Res Cards (which is highlighted with a red oval). Below the tabs is a search form titled "Active Res Cards". The search form includes a "Find Res Cards by..." section with a "Status" dropdown menu set to "Active", a "Res Card Passenger Name" input field, and "Find" and "Reset" buttons. A "Go to Advanced Search" link is also present. Below the search form is a table with columns: Status, Name, Destination, Trip Start Date, Trip Name, and ResCycle. The table contains five rows of data, each with a "View" link and a gear icon.

Count	Status	Name	Destination	Trip Start Date	Trip Name	ResCycle
View	Active	Watkins/Sam and Shirley		1/7/14	London Mystery Tour	Under Deposit
View	Active	Schroeder/Nancy	Caribbean	12/13/13	Carnival	Under Deposit
View	Active	Able/Kenneth	Pacific Rim	11/29/13	Journey Down Under	Under Deposit
View	Active	Schwab/Melinda	Europe/Russia	11/11/13	QE2 Final Sailing	Under Deposit
View	Active	Rosen/Steve		11/10/13	Carnival Cruises	Under Deposit

Stored links and search fields for Res Cards are available for selection from the drop-down *Global Saved* and *Personal Saved* links as well as Simple and Advanced Searches to enter a custom search. From this area, *locate*, *add*, or *modify* Res Cards. Upon entering Res Cards and refreshing the search, by default the system displays active Res Cards.

To retrieve a specific Res Card, click *View* or the action menu icon (gear) next to the entry to edit, create an invoice, or access a Client Profile for which the Res Card was created. Res Cards automate your manual reservation data and provide the means to generate itineraries and invoices (under construction) for customers and track client balances.

Once you have accessed the desired Res Card, add a new reservation or modify or delete an existing reservation. From this screen, create reminders or print the passenger’s itinerary. Being able to print an itinerary for your client as many times as desired during the course of planning an extended trip, is a very useful feature in providing excellent customer service. The details of any trip itinerary entered on a Res Card can be as basic or as detailed as you choose to make them, but be mindful that the information held in Res Cards can be extremely valuable for reporting purposes if agents take the time to enter the details of trips. For example, if agents get in the habit of entering service providers and allocating the pricing among the service providers, detailed reporting can be done not only on the vendors you may use to package a tour, but also on the individual components of that package such as hotels, cars and airlines.



Unleashing the Power with Profiles



At the heart of *ClientBase Online* is Profiles. From this area, view, sort and manage all the client, agent, or vendor information, or manage relationships with prospective clients and vendors. This is where many agents spend most of their time - accessing and updating data. In the past, a potential customer has called your agency, but never made it into the “system” because they did not book a trip. With *ClientBase Online*, turn prospects into lifetime customers by tracking these potential clients, taking ownership of them and including them in future marketing programs.



Example: Steve Rosen calls to plan a surprise getaway with his wife for their upcoming anniversary. After locating his profile, you notice he has Travel History and he has booked travel with the agency in the past. You quickly check the past travel history, then glance at the marketing preferences and with this information you are able to suggest just the right travel package. He appreciates your natural knowledge of their needs, which is why he books through you again and again. Oh, and while you are in their profile, you quickly capture the date of their anniversary in the *Special Dates* table, so next year you can initiate the idea of a romantic getaway.

Leisure - Rosen/Steve

Mr. and Mrs. Steve Rosen 1183 E. Kent South Sandy, UT 81092	Phone: +1 (604) 872-1192 Fax: E-mail: srosen@msn.com Web:	Interface ID: 6048721192 Primary Agent: Sharon Meyer Created: 2/9/10 Groups: Profile No.: 9948140
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Remarks: Don't forget to mention his dog - Spot! Reminder

- More about Rosen/Steve...
- General Info
- Remarks
- Marketing Codes
- Family Members
- Activities
- Credit Cards
- Loyalty Programs
- Res Cards
- Travel History

Address 1183 E. Kent South Sandy, UT 81092 Address Type: Primary, Bill To, Ship To	
Communications	Special Dates
Phone: +1 (604) 872-1192	Date: 12/05 Type: Regular Vacation Tim
EMail: srosen@msn.com	Date: July Type: Wedding Anniversary
Additional Info Profile Name: Rosen/Steve Name: Mr. and Mrs. Steve Rosen	Profile Status Profile Status: Active Create User: MARY



Quick Steps to Using Profiles

STEP ONE: Open Profiles

The *ClientBase Online* program defaults to *Profiles* when opening the program.

From Profiles:

a. Add a new profile: Be careful about duplicate profiles. Look first and verify that a profile does not exist before deciding to add one. We recommend using only the first three letters of the last name when searching for a profile. To add a new profile, click *Profile* on the menu bar, and select the profile type (Leisure, Corporate, Service Provider, Vendor, Agent or Other) off the drop-down menu.

b. Retrieve a profile by using a Simple or Advanced Search, and click *View*.

Simple Search sorts on up to two fields of information selected from the pull-down menus and allows you to quickly access a profile with basic information known about the customer. For example, if you are searching for the Rosen profile, and *Profile Type* and *Profile Name* are the search fields, select *Leisure* for the *Profile Type* field and *ros* (the first three letters of the last name) in the *Profile Name* field. Click *Find*. All the Leisure profiles beginning with *ros* as the first three letters of the last name appear in the Search Results.

Advanced Search sorts on multiple fields. Click *Go to Advanced Search*, then *Enter Data to Search by* if you need more than two fields to retrieve a profile, or when the only known information is a field not used in the Simple Search. Complete as many of the search criteria fields as desired. Each additional field selected is strung together with an “and” that more narrowly defines the search.

STEP TWO: Review, Add to, or Modify the Profile

Click *View* or the action menu icon (gear) next to the profile you want to retrieve to access client details. The profile window organizes all the vital information pertaining to your client's needs. We designed this window to be a “dashboard” for travel professionals who need quick access to key client data. Each leisure profile represents one household. Whether you are retrieving someone's passport number, a second address, or the cruiseline last booked, this is the place to go.

A client profile in *ClientBase Online* stores an unlimited amount of information about your customers. To organize all this information and make it easily accessible, each profile is made up of key areas.

Leisure Profile

The screenshot displays the 'Leisure Profile' for 'Rosen/Steve'. At the top, there are navigation tabs for 'Profiles', 'Activities', 'Res Cards', and 'Tools'. Below this is a 'File Mgrs/Menu Bar/Global & Personal Saved Searches' section with search filters. The main header area contains contact details for Mr. and Mrs. Steve Rosen, including their address, phone, fax, and email. A 'General Info' section on the right shows the interface ID, primary agent, and profile number. A 'Remarks' section contains a note about mentioning a dog. A left sidebar lists various profile links, with 'General Info' circled. The main content area has several expandable sections: 'Address', 'Communications', 'Special Dates', 'Additional Info', and 'Profile Status', each with an 'Add' or 'Edit' button.

1. File Managers, Menu Bar, and Global and Personal Saved Searches

Access these key program areas while working in the profile.

2. Header

The Header conveniently displays pertinent information that an agent reviews each time he works with a customer. Information includes primary address and primary communication information (telephone number, Interface ID, fax, E-mail address, and more). Also in the header are *Indicator Icons* which show a user at-a-glance that this profile has Res Cards, Travel History, or Open Reminders. By clicking on one of these icons, you can navigate quickly to that particular link.

3. Profile Links

a. General Info: The General Information screen displays primary client data for this household. At a glance, see address and communication information, special dates, Interface ID, primary agent, referral sources and profile create date.

b. Remarks: View any miscellaneous customer from this screen. Users may enter any free flow remarks here.

c. Marketing: The marketing folder provides the means to track client interests and travel preferences to provide selling agents with key information during the qualifying process of selling leisure travel. Marketing tables are also powerful links to clients with common travel interests when planning a direct mail campaign or planning group travel. Reports showing the travel preferences of customers are extremely valuable in matching customers and travel specials.

d. Family Members/Employees: Organize information for each family member/traveler. Collect details such as passport information, credit cards, and communication details.

e. Activities: This window lists all past and current Notes, Reminders, and Mailers that have been captured for this profile. Sort by clicking the *Mailers, Notes, Reminders, All Activities* hyperlinks above the screen.

f. Cards: Keep track of customer's credit cards, travel clubs, frequent flyer numbers, expiration dates, and more in a customer profile. All card information for any traveler appears in this folder.

g. Res Cards: This link allows you to view all customer Res Cards. *Add* or *Modify* Res Cards, or sort by clicking hyperlinks at top of screen, *All Res Cards, Active, Departed, or Cancel*.

h. Travel History: From this window, agents can easily review past travel purchases (invoices) as they appear in *TRAMS Back Office* accounting system.

i. Groups: View the group(s) to which this customer belongs. This group table is presently maintained by the database administrator and shared with *TRAMS Back Office*.

j. Attachment: To enhance the information accessible in a *ClientBase* profile, a feature is included in all profile types allowing you to point to other files available on your local or network drive. These files are called *Attachments*.

k. PNR Entries: A PNR Entry table is available at the Profile level so that you can format miscellaneous remarks for this client and then seamlessly paste them into a PNR. PNR Entry tables are also included at the Agent levels.

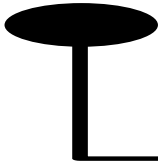
l. More Fields: If you want to track it, and *ClientBase* doesn't ask for it, here is where you can create your own customized fields of information. Things like Social Security numbers, client UDID's and other miscellaneous information that you want to track can be captured in these fields.

STEP THREE: Save Any Changes You Make

After you add/modify/delete information in any of these Links, make sure to click *Save*.



NOTES:



Save Time and Duplication with Merge to PNR



No more multiple entries or databases! *ClientBase* provides your agents with the ability to move customer information (maintained in the *ClientBase* profile) to your reservation system's PNR. This feature works with Amadeus, Apollo, Sabre, and Worldspan. Sit back and watch your database grow and watch yourself become more efficient by using your marketing database to build PNRs. You'll be surprised at how quickly existing customer information gets updated, and how quickly new customer information gets added to your marketing database, when agents use it as their source for building PNRs. Also, watch your customer loyalty grow as agents access customer information when building PNRs for your leisure clients, rather than repeatedly asking them for the same information.

Important Note: Anyone using ClientBase Browser or ClientBase Online needs to download and run this file before using Merge to PNR: <ftp://ftp.trams.com/pub/updates/utilities/CBBComps.EXE> .



Example: James Smith calls your agency to book some flights to Paris. Your agent, Susan, first locates James's profile in your marketing database (*ClientBase*) and verifies current address, phone, email, passenger, card and loyalty program information. Once confirmed, she clicks the Merge to PNR button and within moments has the PNR started with all of Ken's necessary information.

The screenshot shows the ClientBase interface. At the top, there are tabs for Profiles, Activities, Res Cards, and Tools. Below these are search filters for Global and Personal Saved Searches. A menu bar includes Merge Options, PNR, Res Card, Live Connect, Note, Mailer, and Reminder. The main area displays the profile for 'Leisure - Rosen/Steve' with contact information and a 'General Info' section. Below the profile is a list of 'Profile Entries' with checkboxes for selection:

- Bill To Address
 - 5/JAMES SMITH\$5/3987 SUNSET LN\$5/FORT LAUDERDALE FL 33331
- Ship To Address
 - 5DL-JAMES SMITH\$5DL-3987 SUNSET LN\$5DL-FORT LAUDERDALE FL 33331
- Phone Numbers
 - 9954-555-8574-H
- E-mail Address
 - PE+THESMITHS@EXAMPLE.COM#
- Interface ID
 - 5.S*AN9545558574
- Passenger Entries
 - SmithJames(Primary)
 - Secure Flight
 - 3DOCS/DB/14AUG65/M/SMITH/JAMES/LEON(NAME FIELD POS)
 - Secure Flight - AA Only
 - 4DOCS/DB/14AUG65/M/SMITH/JAMES/LEON(NAME FIELD POS)
 - SmithMary(Spouse)

An arrow points from the 'PNR' button in the menu bar to the 'Additional Entries' button at the bottom right of the profile section. A text box next to this arrow states: 'Susan checks off anything she wants to go over to GDS and clicks Send to PNR.'



Quick Steps to Merging a Profile into a PNR

STEP ONE: Retrieve the Customer Profile:

Use the Simple Search in the Profile Manager to retrieve your desired customer profile. Verify address, phone, email, passenger and card information is current.

STEP TWO: Click Merge to PNR on the menu bar:

Click *PNR* on the menu bar. The very first time you use the Merge to the PNR feature, you are presented with a screen from which to pick this platform one time only. Unless you are using Worldspan which uses the Windows Clipboard, you are using an API (Application Protocol Interface). Select the appropriate platform and click *Next*. After the first time you Merge to the PNR the platform selection screen is displayed, but you can just click *Next* to continue.

STEP THREE: Select the Data to Include in PNR:

You are prompted with a series of check boxes in the PNR Builder Selection Screen. The gray area recaps (previews) entries which have been setup to always move into the PNR. Select the information you want to move to a PNR by scrolling down and checking or unchecking any optional entries. Click *Cancel* to abort the Merge to PNR process, *Refresh* to see an edited version of the gray recap screen at the top of the selection screen, or *Preview*.

STEP FOUR: Review Formatted Entries and Finish:

Review the information formatted for your GDS. Make any edits, and click *Finish* to transfer the data to your current PNR.

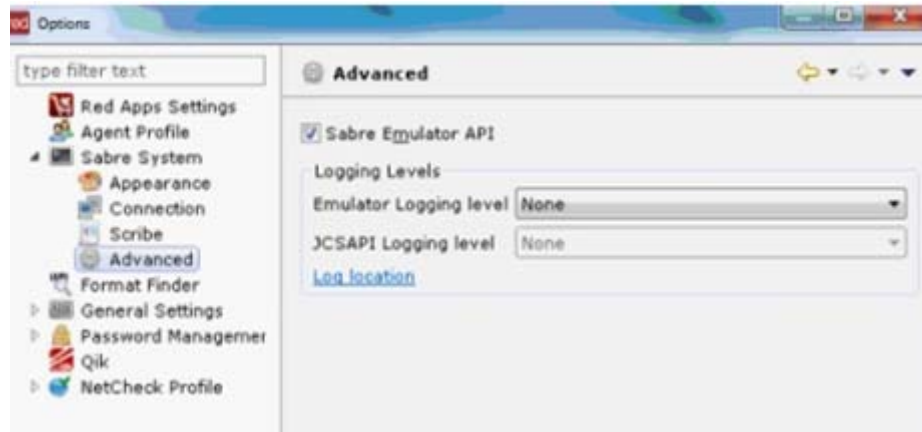
STEP FIVE: Toggle to GDS to Display the Merged PNR Entries:

Return to PNR and display your current record. All customer information sent from *ClientBase* is displayed in a “live” PNR. Clicking *Preview* takes you to a PNR screen where you can edit and get a full-page preview of any entries you have approved. The screen displays all information in the exact format that it will land into your current PNR. Information on this screen can be modified, but does not permanently update your ClientBase profile. Pressing *Finish* does the following depending on your CRS:

Sabre Red, APS, Vista, and Apollo/Galileo Users: When clicking *Finish*, the previewed information is pasted into your current PNR. If this occurs successfully, a confirming message appears. Use your normal Windows command (<Alt+Tab>) to toggle into your CRS, hit Display All and view the updated PNR.

Sabre Red Users: An API is the tool *ClientBase* uses to connect to the Sabre Host. In order for PNR Import (and Merge to PNR) to work, you must enable the MySabre API within Sabre Red. Select **Tools|Options|Sabre**

System|Advanced and check *Sabre Emulator API*:



Amadeus Plus Scripts (APS), Vista, and Apollo/Galileo Users: When clicking *Finish*, the previewed information is pasted into your current PNR. If this occurs successfully, a confirming message appears. Use your normal Windows command (<Alt+Tab>) to toggle into your GDS, *Display All* and view the updated PNR.

Special Note to Amadeus Users: Amadeus has 3 platforms - APS (which stands for Amadeus Pro Software), Vista, and ProWeb. The Amadeus tool we use for Merge to PNR and PNR Import is called Amadeus +Script and is available with both APS and Vista platforms. (If the agency's APS or Vista platform did not come with this +Script tool activated, then contact the Amadeus support desk to turn it on. Amadeus has agreed to waive an fees associated with +Scripts for all TRAMS customers, so there is no cost, just a phone call to the support desk.)

Worldspan: When pressing *Finish*, the previewed information is placed in the Windows clipboard. If this occurs successfully, a confirming message appears. Use the normal Windows command (<Alt+Tab>) to toggle into your GDS, retrieve or display the appropriate PNR, and paste what was placed in the clipboard using either <Ctrl+V>, <Shift+Insert>, or Edit/Paste, then press Enter to transmit the entries, and Display All to view the updated PNR.

GDS Selection Link - If you need to change the GDS platform with which you are working, click the GDS Selection link.

Additional Entries Link Within each PNR Entry or PNR Rule that is set to Always Move, an option is included called "Display on Screen". The PNR Selection Screen is the screen that appears when you use the Merge to PNR feature and allows you to select the specific profile data to be included and sent to the current PNR. For PNR entries that should always move regardless of the profile or PNR, this "Display on Selection Screen" can be unchecked so that the Selection Screen is less complicated for the agent to review. Any of these entries that have not been designated to display on the selection screen can be viewed, if desired, by clicking the "Additional Entries Link". Place a check mark next to each item of information you would like to include in your current PNR. Click *Next* when items are selected.



Quick Steps to Creating PNR Entries

STEP ONE: Go to Profile PNR Tab, Family Member/Employee PNR Tab, or Agent Tab:

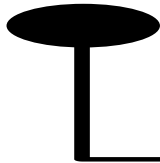
In order to capture profile, passenger or agent-related PNR entries (such as general remarks, special meal requests, air/car/hotel preference, UDID's, department, etc.), a tab is included at the profile level and at the family member/employee level. Use the Add, Modify, and Delete buttons to maintain specific PNR entries for each passenger. There are no limits to the number of PNR entries captured in this table.

STEP TWO: Click *Add* and fill in the following fields:

CRS: Choose your CRS system from the drop-down menu. **Description of Entry:** Enter a free-flow "Description" field. **Always Move:** By selecting *True* from the drop-down menu, the entry always moves when you do a merge to CRS. If *False* is selected, moving the entry is optional. **Display on Screen:** When *True* is selected, the entry automatically displays on the front screen when Merging to the PNR. If *False* is selected, the entry is displayed on the *Additional Entries* link. Within each PNR Entry or PNR Rule that is set to *Always Move*, an option is included called "Display on Screen". The PNR Selection Screen is the screen that appears when you use the Merge to PNR feature and allows you to select the specific profile data to be included and sent to the current PNR. For PNR entries that should always move regardless of the profile or PNR, this "Display on Screen" can be set to *False*, so that the Selection Screen is less complicated for the agent to review. Any of these entries that have not been designated to display on the selection screen can be viewed, if desired, by clicking the "Additional Entries Link" in the Merge to PNR feature. **PNR Entry:** Enter the PNR entry the way you would in your reservation system and then *Save*.



NOTES:



Streamline Marketing with Point-and-Click Codes



The Marketing Tables in *ClientBase Online* helps you identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. Since qualifying a customer for a leisure vacation can be the toughest part of selling leisure travel, access to this valuable information might just make the difference between closing a sale or losing it. These marketing codes make it possible to consistently put the right product in front of the right client by both front-line agents and any marketing programs geared towards generating travel interest.

A master set of marketing tables appears in every client's profile under the *Marketing* link. These tables are being maintained by the database administrator in the client version of ClientBase and can be customized to meet your agency needs. With a simple point-and-click with the mouse, every agent selects from the same list, and that means client consistency and agent simplicity.



Example: Steve Amaral calls in and requests some information on a trip to the Cayman Islands. He read about the great destination in his favorite *Scuba Weekly* magazine and figures it would be a great place for a honeymoon (may as well squeeze in some diving). By clicking on the Marketing link and *Edit* in Steve's profile, the agent easily places a checkmark in the box next to *Scuba/Snorkel* under the *What Interests* Table. Now, when your agency has a scuba or snorkeling-related itinerary to promote, rest assured that Steve will be included among the other qualified clients you are tempting with the great deal!

<p>Selected Codes:</p> <p>1. When? • Summer • Winter • Last Minute</p> <p>2. Where? • Central/So America</p> <p>3. With Whom? • Family/Young</p> <p>4. What Type? • Cruise</p> <p>5. What Interests? • Bridge/Cards • Culinary/Wine • Cultural Events • Dancing • Gambling • Golfing • Sun/Beach • Tennis</p> <p>6. What Budget? • Economy • Moderate • Deluxe</p> <p>7. Client Status • Client • VIP</p> <p>9. Function attendance • QS Reports • QS Reports - Profile</p>	<p>1. When?</p> <p><input type="checkbox"/> Spring <input checked="" type="checkbox"/> Summer <input type="checkbox"/> Fall <input checked="" type="checkbox"/> Winter</p> <p><input checked="" type="checkbox"/> Last Minute</p> <p>2. Where?</p> <p><input type="checkbox"/> Africa <input type="checkbox"/> Asia <input type="checkbox"/> Bermuda <input type="checkbox"/> Canada</p> <p><input type="checkbox"/> Caribbean/Jamaica <input type="checkbox"/> Caribbean/Other <input checked="" type="checkbox"/> Central/So America <input type="checkbox"/> Europe/Eastern</p> <p><input type="checkbox"/> Europe/Brit,Ireland <input type="checkbox"/> Europe/Mediter <input type="checkbox"/> Europe/Scandinavia <input type="checkbox"/> Europe/Western</p> <p><input type="checkbox"/> India <input type="checkbox"/> Mexico <input type="checkbox"/> Mideast/Israel <input type="checkbox"/> Mideast/Other</p> <p><input type="checkbox"/> SoPacific <input type="checkbox"/> Transcanal <input type="checkbox"/> USA/Alaska <input type="checkbox"/> USA/California</p> <p><input type="checkbox"/> USA/Disney <input type="checkbox"/> USA/Florida <input type="checkbox"/> USA/Hawaii <input type="checkbox"/> USA/Las Vegas</p> <p><input type="checkbox"/> USA/New England</p> <p>3. With Whom?</p> <p><input type="checkbox"/> Single:Young <input type="checkbox"/> Single:Mature <input type="checkbox"/> Single:SrCitizen <input type="checkbox"/> Couple:Young</p> <p><input type="checkbox"/> Couple:Mature <input type="checkbox"/> Couple:SrCitizen <input checked="" type="checkbox"/> Family:Young <input type="checkbox"/> Family:Teens</p> <p><input type="checkbox"/> Grandparents <input type="checkbox"/> Single:Parent</p> <p>4. What Type?</p> <p><input checked="" type="checkbox"/> Cruise <input type="checkbox"/> Package <input type="checkbox"/> FIT <input type="checkbox"/> Tour-Escorted</p> <p><input type="checkbox"/> Tour-NonEsc <input type="checkbox"/> All-Inclusive <input type="checkbox"/> Visits Friends/Relat</p> <p>5. What Interests?</p> <p><input type="checkbox"/> Adventure <input type="checkbox"/> Bicycles <input type="checkbox"/> Boating/Sailing <input checked="" type="checkbox"/> Bridge/Cards</p> <p><input checked="" type="checkbox"/> Culinary/Wine <input checked="" type="checkbox"/> Cultural Events <input checked="" type="checkbox"/> Dancing <input type="checkbox"/> Ecotourism</p> <p><input type="checkbox"/> Fishing <input type="checkbox"/> Gambling <input type="checkbox"/> Golfing <input type="checkbox"/> Hiking/Walking</p>
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Quick Steps to Viewing and Selecting Client Marketing Codes

STEP ONE: In Client Profile, click the *Marketing* link

Query the client profile and click *View* to enter. Click the *Marketing* link to enter the Marketing tables, and *Edit*. See what codes have been already selected for this client and click *Edit* to change or select new codes.

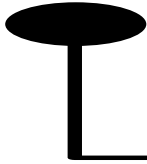
STEP TWO: View and Select Global Marketing Tables and Codes

Check/Uncheck any appropriate marketing item.

STEP THREE: Save Any Changes



NOTES:



Be Prepared with Travel History



If you are using *Trams Back Office* as your agency accounting system or start invoicing in ClientBase, *ClientBase Online* actually shares a common database with that program. This means certain information captured in *Trams Back Office* can be accessed, viewed and used as search criteria in *ClientBase Online*. One of the many benefits this brings to front-line agents is the ability to easily access details of a client's travel (purchase) history. The Travel History folder in *ClientBase Online* brings travel purchase history right to agents' desktops, making them better prepared to provide the right travel solutions. Best of all, historical data does not have to be entered by hand. Past purchases and payments are displayed instantaneously, while at the same time protected, as this information is for viewing and searching only. Agents cannot make any changes to the invoice records displayed in this folder.

The combination of travel purchase data (Travel History folder) and travel preference data (Marketing folder) gives you the ultimate capability to match your clients with offers for products they will enjoy and can afford. Having access to this combination of data is one of the things *ClientBase Online* does best and that helps agents sell smarter.



Example: Ken Able, a long-time agency customer, is coming in this afternoon to talk about the possibility of booking a cruise. He's looking for some fresh ideas on an exciting new travel experience. You quickly access his profile in ClientBase and checkout his Travel History. From here you determine if he has ever booked a cruise and, if so the cruiseline, the itinerary and how much was spent. Looking at other travel categories, itineraries and vendors booked also gives you some insight on past travel tendencies. Next, you review

his marketing preferences and by the time Ken arrives at your desk, you feel prepared and confident in making a travel recommendation he can't refuse.

This Indicator Icon shows there is travel history. By clicking on it, you will enter that area in profile.

Leisure - Able/Kenneth Res Cards

Mr. Kenneth David Able 1257 Orange Street Los Altos, CA 94022	Phone: +1 (650) 988-1222 Fax: E-mail: kable@earthlink.net Web:	Interface ID: 6509881222 Primary Agent: Sharon Meyer Created: 10/21/97 Groups: STANFORD ALUMNI Profile No.: 9848385
--	--	---

Remarks: ***VIP***

More about Able/Kenneth... Res Cards - Summary [Switch to Detail View](#) -- Create Res Card --

Filters: All Res Cards [Active](#) [Departed](#) [Cancelled](#)

	Res Card No.	Status	Trip Locator	Trip Name	Create Date	Region	Trip Sour
View	2451942	Active		Carnival Cruise 5/13	1/21/13	Bermuda & Caribbean	
View	2452802	Active		Las Vegas Live Connect	12/5/12		Las Vegas
View	2451985	Active		Panama Canal 2013	11/1/12		
View	2451922	Active		Journey Down Under	3/13/12	Asia	
View	2452014	Active		Pleasant Holidays Live Connect	8/26/11		
View	2452013	Cancelled		Funjet Test	5/19/06		

Navigation: [Res Cards](#) [Travel History](#)



Quick Steps to View Trams Travel History

STEP ONE: Determine if a customer has Travel History

After retrieving a customer profile, quickly determine if a customer has Travel History by looking for a Travel History Indicator icon in the right side of the header, or in the *Travel History* folder.

STEP TWO: Sort and Filter Results

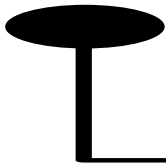
By default all past Travel History is displayed in the link, invoice by invoice, booking by booking. Click *Search* to display. In addition to the listing of past purchases, Sales and Commission Totals and Averages are displayed. The *Sort* controls the way the search results are displayed on the screen. Sort on different fields by clicking on the drop-down arrow located to the right of the field and selecting from the list (Issue Date, Depart Date, Travel Category, Passenger Name, First Inside Agent, Invoice #, Invoice Type, Invoice Status, and Ticket and Confirmation #).

To narrow the search to a specific time period, enter a From and To date in the Issue Date fields. The three dots next to the right of the fields bring up a calendar to help in your selection. Click *Search* to update your results.

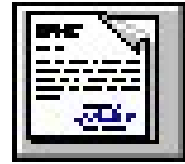
Travel Categories can also be used as search criteria (e.g. "show me only cruise history") by checking/unchecking any item from the travel category list. Click *Search* to update your results.



NOTES:



Print Custom Letters and Merge to File



Sending personalized letters frequently helps build stronger relationships with clients. That's something *ClientBase* does best. Document templates that come with the program and have been customized for your agency make it easy to print personalized letters to clients. Your own custom agency templates added to the database create a central "library" of documents that any agent can access. The speed and ease of this feature gives agents reason to be more pro-active in their communication with their customers.



Example: In less than two minutes, an agent can print a custom "Welcome Home" letter to send to a client returning from a cruise. Another example: Once a week you query for all new customers to the agency, using the profile Create Date as search criteria. From the results of the query, you can instantaneously merge all client information into a "Welcome to the Agency" letter and in seconds have all of the letters personalized and printed.

Search the database using Advanced Search for new client profiles created this month.

When results appear, click *Merge to Document* in the *Merge Options* on the menu bar. Select *Welcome to the Agency* letter from the drop-down menu. Click *Create Word Document*.

Create a mailer record for history in the client profiles, and then print documents.



Quick Steps to Printing Custom Letters

STEP ONE: Search Database for the Desired Profile/s:

The first step in using the *Merge to Document Template* feature is to use Profiles to find the profile(s) to merge with the document template. When merging information into a document template, you have several choices. Merge the information to a document template from the results screen by: a) Selecting the desired profile and clicking action menu icon (gear) in Profiles, and *Merge to Doc*. b) From within a client profile, clicking the *Merge to Doc* under the Merge to options on the menu bar. c) Searching for a **group** of profiles in Profile Manager and clicking the *Merge to* area on menu bar.

STEP TWO: Browse for the document template to use and click *Create Word Document*. A letter or a set of letters is merged with information from each client's profile into the Microsoft Word, Wordpad, Open Office, etc. application while you are still in the browser.

STEP THREE: View the document with all fields merged. From here the document can be edited, if desired, and printed. The program you have associated with .doc type files within your Windows settings determines the program used upon clicking *Create Word Document*. To change the program associated with .doc type files, browse for a .doc file from My Computer, right click on the file and select properties. From the General tab click *Change* next to *Opens with* and select from the drop-down list of choices.

Note: Set up of Document Templates can be done by going to Tools|Setup|Agency Settings. Complete directions for setup are contained in the help files inside ClientBase Online.

STEP FOUR: Create Mailers: The Mailer icon automatically creates a mailer record for every customer which can be included in search results for historical purposes. The mailers can be viewed from within the client profile by clicking the Activities link, and can also be searched for from Activities by date or subject.

STEP FIVE: Do spell check and print letters.



Quick Steps to Using Merge to File

Use the results of a Profile, Activity, or Res Card query to *Merge to File*. This enables you to create an *ASCII* delimited or text (.txt) file which can be used in other applications such as MS Word, Excel, etc. to run labels or reports, and print from your local workstation.

STEP ONE: The first step in using the Merge to File feature is to use Simple or Advanced Searches in Profiles, Activities, or Res Cards to find the list of records to be included in the ASCII export.

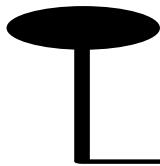
STEP TWO: Designate the fields and sorts to include within the file for each record in your results by using *Select Columns* to add or remove the fields within columns as desired. To change the sorting, use *Sort by Columns* to setup to three levels of sorting criteria.

STEP THREE: Click *Merge to File* from the Merge to options on the menu bar to run the export. A dialog box appears prompting you for the following information: **File Name:** Enter the name to assign the file. (No need to enter the drive, directory or file extension as you are prompted for that information later.) **Include Field Name:** This is checked by default and determines whether field headers describing the fields of data in each record are included in the file. **ASCII File Type:** Select either *Comma delimited* or *Tab delimited*. This character separates each field included within each record in the file.

STEP FOUR: Click *Export* to begin the export process.



NOTES:



E-mail Blast - 21st Century Communication



Your agency has built a valuable database by consistently collecting and recording client data. Now it is time to put that data to work for you! Save valuable time by using the *ClientBase* E-mail “blast” which allows you to send one E-mail to any number of profiles at the same time.



Example: Your agency has just received a hot, new, Bermuda cruise special at a great price. You need to notify all your deluxe cruisers as soon as possible so that they can take advantage of this terrific deal. Your agent, Michael, first locates all the deluxe cruisers in your database by using Advanced Search. He checks the results and clicks *Merge to E-mail* in the Merge to options of the menu bar. He types the details of the cruise into the e-mail (or he can use a document template created for the mailing). He clicks *Send All* (after creating a mailer), and within minutes, each deluxe cruiser is notified of the upcoming sailing.

Michael clicks on Advanced Search. He clicks the Profile Type of “Leisure.”

Under the Marketing Tab, Michael checks off “Cruise” from the “What Type” Marketing Category, and “Deluxe” from the “What Budget” Marketing Category. When he clicks OK, all Deluxe Cruisers appear in the Search Results screen.

4. What Type?

From the Results Screen, Michael Clicks on Merge to E-mail from the Merge options on the menu bar and launches the “blast” E-mail Feature.

He types one E-mail detailing the Bermuda Cruise Special (or chooses a document template created for the special mailing), creates a mailer, and clicks on “Send All.” Each profile immediately receives the E-mail. He creates a mailer for tracking purposes.



Quick Steps to E-mail Blast

STEP ONE: Set up your E-mail

Click the Merge to E-mail button from within any profile to launch the e-mail composition screen. From this e-mail screen click the *Settings* link. Complete the following information and then click *Save* to permanently store these settings for your User Login. Complete the *User Login SMTP Settings* obtained from the entity responsible for maintaining your mail server:

From E-Mail Address: Enter the e-mail address for the user login you are setting up. The address entered here appears as the from address for all e-mails sent from this user. If you wish to change this address frequently, do so at the e-mail level when you are sending it out.

In the *From E-Mail* field, if you type **joyce@trams.com** and a message is sent, you see the From field saying **joyce@trams.com**. Some people prefer it to look like this instead, **Joyce Smith**. To have it appear like this, type **Joyce Smith<joyce@trams.com>** instead of just **joyce@trams.com**. You can also use your company name or department name; for example, **Travel With the Stars<sales@TWTS.com>** or **Star Travel Marketing<sales@TWTS.com>**.

Outgoing Mail Server (SMTP): Enter the outgoing mail server name determined in your steps above. Examples: mail.domainname.com, smtp.domainname.com, or gmail.wspan.com).

Port: This setting defines the TCP/IP port which your e-mail application listens on for incoming mail. If left blank, this setting uses port 25 by default, which is the Internet standard for receiving SMTP mail. In some situations, you may have chosen to move the SMTP service to another port. Perhaps you already have a service on port 25, and you do not want the services to conflict over the port assignment. In such a case, enter the port ClientBase Plus should use.

Authentication Type: Set to either *None* or *Default*.

Default: A setting used to authenticate your connection to the SMTP mail server by forcing a USER name and password. If the network login does not handle this authentication automatically, then set this field to *Default*.

None: If your agency is hosting your own e-mail server and the network login has been configured to handle the authentication to the SMTP Server automatically, set this field to *None*.

E-Mail Account Login and Password: Use when *Login Type* is set to *Default*. Enter your E-Mail account login and password here.

STEP TWO: Retrieve the Desired Customer Profiles:

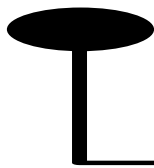
Use Simple or Advanced Searches in the Profile Manager to retrieve your desired customer profiles. Verify the profiles you have queried are correct in the Search Results Screen, and that the profile E-mail addresses are valid. Only the E-mail entry flagged *Primary* is used with the Merge to E-mail feature.

STEP THREE: Click the Merge to E-mail Button:

Click the Merge to E-mail icon located in the Merge to options on the menu bar of the Profile Manager.

STEP FOUR: Type the E-mail Message, Create Mailer and Send to All Selected Profiles:

Make sure the subject field is filled in. Enter e-mail test or use the **Load Doc Template** to select from a listing of your global templates and/or use the **Insert Fields** to insert merge fields in combination with free flow text. Make sure to create a mailer (a history within each profile so you can track how successful your e-mail promotion is), and send it to yourself first so you can edit it before it's sent to others.



Strengthen Client Relationships with Activities



Tired of the paper nightmare taking over your desk? So many post-it notes you can hardly find your computer? Through the use of Reminders, Notes, and Mailers, *ClientBase Online* makes tracking communication with your clients a paperless process. Best of all, this information can be shared among agents and used to manage the marketing activities going on in your agency.

Note

Mailer

Reminder

Notes allow Agents to easily document contact your customers have with your agency such as Client Comments, Client Inquiries, or Client Questions.

Mailers act like entries in a marketing “log.” They are a historical record created automatically whenever a label, document template, Email, or mail merge file is created for a client or group of clients.

Reminders act as “ticklers” to keep you on top of important activities like brochure follow-ups, final payments, welcome home calls, birthdays and other marketing activities. Agents create Reminders to schedule future contacts and maintain daily To-Do lists.



Studies have shown agents' productivity and sales increase dramatically when using an activities management system like *ClientBase Online*. Better agent productivity is an important ingredient of a happy and successful agency.



Example:

The agency's most productive agent, Sharon, works from a daily reminder and To-Do list in *ClientBase Online*. From this area, she tracks and completes all of the customer marketing tasks that keep her valued clients loyal. *ClientBase Online* helps Sharon manage her schedule and “To-Do” list so she is efficient at:

- Following-up and closing just about any travel lead that comes her way.
- Managing all of the tasks involved in planning a trip, including checking on payments, documents, waitlists, seating etc.
- Welcoming her customers home from their trips, as well as scheduling and managing on-going communications with her valued customers.

The way that Sharon begins her work day each morning tells you one of the reasons that she is a productive agent. The first thing she does when she signs into *ClientBase Online* is click *Activities*. By default, *ClientBase Online* queries the database for Sharon's Open Reminders and the Search Results Screen immediately displays a list of the Reminders (or tasks) she needs to complete today when she clicks *Refresh*.



Quick Steps to Using Activities

STEP ONE: Use Reminders to Schedule New Travel Inquiry Follow-ups

Cultivate travel interest and turn it into a sale by putting systematic follow-up routines in place. Use Reminders in *ClientBase Online* to remind you of these follow-up calls and any other tasks you need to do. This is easily done by creating a new Res Card whenever a client calls about a trip by clicking *Create Res Card* icon on the menu bar in a client's profile; or in the Res Card Manager. Fill in the *Res Cycle*, and *Trip Name*. Save. Links appear on the right of the Res Card. Click the *Activity Link*, *Create Activity*, and *Reminder*. Reminders include a Date, the User Name, Priority, Type, Subject, freeflow Remarks and a default attaching the reminder to the reservation you're in. Complete all desired fields in the Reminder screen, and Save. Rest assured that this Reminder automatically appears on your "To-Do" list on the scheduled day.

STEP TWO: Use Notes to Document Client Interaction

Document when a customer calls and makes a comment or asks a question by clicking *Note* on the menu bar in a client profile, or by clicking the action "gear" in *Profiles*. Each Note includes the Date and Time the note is created, the User, a pull-down menu for the subject of the note, for example, "Client Question," a pull-down menu to attach the note to a reservation, and a field for free flow remarks. Any agent in the office with the security permission can view this Note by opening the profile and clicking on *Activities*.

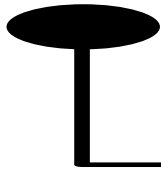
STEP THREE: Use the Activity Manager To Review Your "To-Do" List of Follow-up Calls

Once you have started creating Reminders to track your new trip inquiry follow-up calls, access an organized "To-Do" list every day. This is obtained by opening the Activity Manager area of *ClientBase Online*. By clicking *Activities* and *Find*, *ClientBase Online* searches your database for any Reminders scheduled for today that have not been completed. Instantly, an organized list appears.

Start by clicking *View* next to the Reminder to enter. Hot-key to the attached profile by clicking *Go To Profile*. From the profile, access phone information, as well as other key data that adds the personal touch necessary for effective marketing. Click on the *Activities* link of the profile to refresh your memory of previous contacts you've had with the client. Use the Complete Date located within the Reminder record, to identify when a Reminder has been completed and then remove it from your "To-Do" list by clicking *Find*.

STEP FOUR: Track Other Activities with Reminders

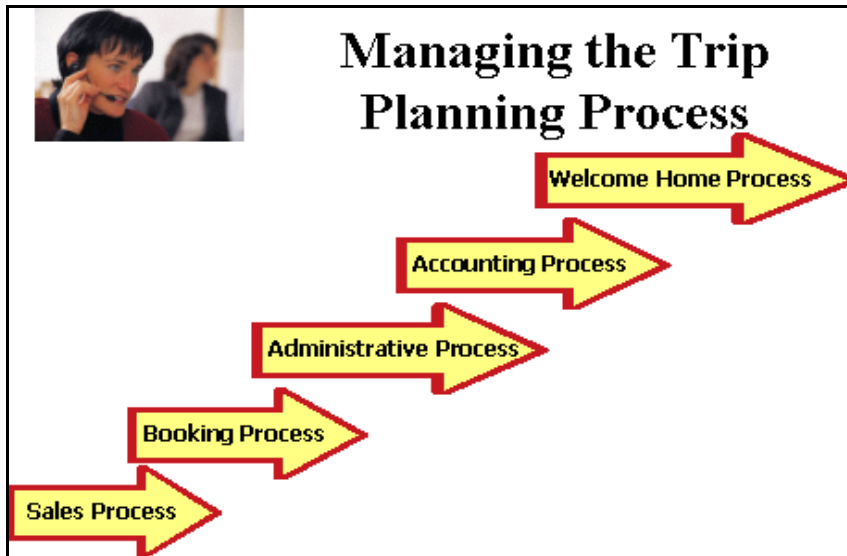
Once you've developed the habit of following up on travel inquires, start using Reminders to organize other marketing and administrative tasks such as Welcome Home calls, payment deadlines, document checking and more. Retrieve the profiles of your most loyal customers and schedule at least five occasions to reach out and touch them to remind them how valuable they are. Use things like birthdays, anniversaries, annual vacation times and holidays as a reason to communicate with these customers. Each time you put your agency in front of your customers, you re-enforce your relationships, reminding them you are their travel professional.



Manage the Trip Planning Process with Res Cards

Res Card

As your agency implements *ClientBase Online* and begins reaping the rewards of improved customer relationships and effective marketing programs, your leisure travel sales should start increasing. To help you better manage this increasing volume of business and track the leads generated by your marketing programs, the “Res Card” has been created. Think of the *ClientBase Online* Res Card as a home for the many details involved in planning each and every trip for your customers and as a tool to manage the entire trip planning process.



Regardless of the technology agents use or don't use, regardless of your niche or type of business, regardless of how long agents have been in the business, there are certain fundamental components involved in the “trip planning process”. The *ClientBase Online* Res Card has been designed to help agents through each process with the objective of making agents more efficient and effective. In the past, agents may have concentrated more of their attention on just the Booking Process, but with the advent of airline commission caps, there has been a new emphasis on leisure bookings and a greater need to manage these leisure sales.

The Res Card feature in *ClientBase Online* provides a perfect tool to integrate all processes in trip planning. By setting up a Res Card, an agent can document the client's first call by creating a new Res Card and scheduling a follow-up call (listed on the daily To-Do list) with a *Reminder*. Once the customer is considering the trip, the agent captures details of reservations and prints out client itineraries. When the client books the trip, the agent produces invoices (that automatically drop into Trams Back Office, while tracking invoiced and uninvoiced balances. Additional notes and reminders are created to remind an agent of a final payment date or a document confirmation. When the customer returns home, the agent documents his remarks and suggestions.

Each Res Card represents one trip; therefore, customers are likely to have multiple Res Cards in their profiles at any one time. Depending on your agency's needs, enter as much or as little trip information on each Res Card as desired. When talking with your clients and vendors, get in the habit of entering the information directly into the Res Card rather than jotting the notes on paper and then transferring the information into the computer. What a time saver this is!



Example: Ken Able inquires about Deluxe Crystal Sailings to the Bahamas. Instead of documenting all contacts about this trip manually on paper, our agent, Sharon, starts a Bahamas Res Card for him in *ClientBase Online*. Every time Sharon has contact with Ken or any vendors/suppliers about this trip, she calls up Ken's Bahamas Res Card and adds information to it. She adds *Reminders* for first deposit, final deposit, to check for documents, and to welcome home. These reminders show up in her daily To-Do List. At any point she prints out a Proposal. When ready for to invoice Sharon creates a document that can be e-mailed to the client and automatically drops into *Trams Back Office*. Sharon can then easily track Res Totals, Invoiced Totals, and Balances.



When Ken phones about the trip, Sharon queries his profile, verifies his address and phone information and goes and clicks on Res Card from menu bar in profile. Sharon can also create a Res Card by going into the create Res Card selection in the action gear in Profiles.

Sharon starts a Res Card (at first it's a "Under Consideration") and puts in all details she learns about Ken's preferences. She creates a Reminder to call Michael sometime in the future to follow-up.



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Branch 0 header

Mr Michael McGrath
224 17th Place
Manhattan Beach, CA 90266

Invoice No. : 204
Invoice Date : 2/25/2008
Travel Consultant : La Tisha Simmons
Group No. :
Page No. : 1

Cruise Reservation			
Vendor	: Carnival Cruise Line	Confirmation No.	: 12345
Booking Status	: Confirmed	No. of Passengers	: 1
Start Date	: 6/15/2008	End Date	: 6/25/2008
Includes Insurance.			

Cruise Triumph

Start Date	: 6/15/2008	End Date	: 6/25/2008
Category	: B	Deck	: Sun
Cabin/Room	: 1150	Dining	: Late - Large Tble - Confirmed
Smoking	: No		

Once Ken decides to take the trip to the Bahamas, Sharon keeps track of the reservation details on the Res Card while the Supplier is on the phone. She prints out a Trip Proposal or invoice. There's plenty of room to make the Res Card as simple or as complex as meets Agency and customer needs.



Quick Steps to Automating Res Cards

STEP ONE: Start a Res Card with Each and Every New Trip Inquiry

Retrieve the desired customer profile. Verify address, email, passenger, credit card, and phone information is current. Click *Res Card* from menu bar. Fill in *Reservation Cycle, Trip Name and Passengers* to start the tracking trip details. Click *Save* and in the *Activities link*, enter a *Reminder* to schedule a *Trip Inquiry Follow-up*. Put all your notes in *Agent Remarks* inside Res Card instead of writing them on a notepad.

STEP TWO: Enter Reservation Details as Learned

As the trip progresses and vendors are on the phone with confirmation numbers, rooming details, or any other trip detail, find the Res Card under the Res Card link in the Client Profile, or in the Res Card Manager, and modify the Res Card. Enter a new reservation, by clicking on the *Reservation* folder, and *Add Reservation* from the drop-down menu. Select the type of reservation you want to create, *Air, Hotel, Car, Cruise, Insurance, Miscellaneous, Rail, Tour, or Service Fee*.

STEP THREE: Organize and Schedule Your Administrative Tasks

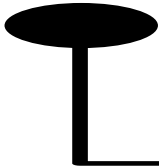
Once any reservations have been booked, use *Reminders* to schedule and organize all the administrative tasks you need to do such as checking deposit, final payment, waitlists and documents. Under the *Activities link*, click *Create Activity*, and choose *Reminder* from the drop-down list to create new reminders. These reminders can be viewed either in the actual Res Card, or in the *Activities link* in the Profile, and of course on your daily To-Do List.

STEP FOUR: Generate Itineraries/Invoices as Needed

At any point in the trip planning process, generate itineraries (in progress) or invoices. Once generated, the invoices automatically drop into TRAMS Back Office.

STEP FIVE: Welcome Your Customer Home

Use a reminder to schedule a welcome home letter and welcome home call. While talking with your customer, capture feedback in the client feedback area in the Res Card. Toggle into the customer profile to enter any new customer details, such as newly learned travel preferences or other personal information. Enter any pertinent details about the vendor or service provider into their profiles as well, so other agents can benefit from what you learn.



Using Live Connect

Live Connect

One of the most innovative features in *ClientBase Online* is Live Connect in the Res Card. Save time and improve efficiency by transmitting selected client information to a booking engine on-line. Then electronically transmit back reservation details and automatically complete the reservation form with what's been booked! Print out client quotes or itineraries and generate invoices. (As ClientBase shares a database with *Trams Back Office*, the invoices generated from the Res Card automatically become part of the invoices shared with *Trams Back Office*.)

Currently ClientBase dozens of Live Connect Providers available for use, but continues to add more on-line booking engines all the time. (Please refer to the help files inside the program, or manual for a current list of Live Connect Providers.)

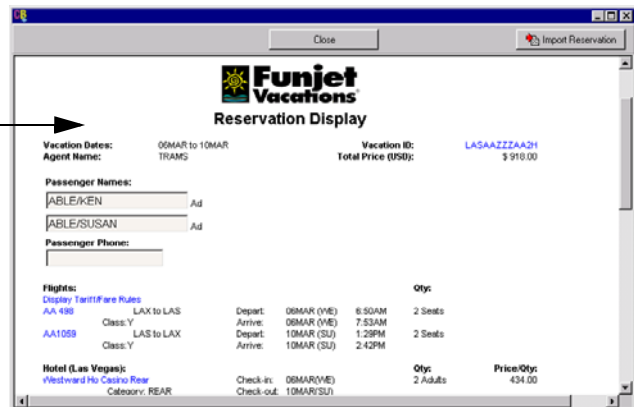


Example: Ken Able calls to book a Las Vegas getaway on his credit card. Agent Mary creates a new Res Card and uses Live Connect to book the trip. After booking on-line, she pulls the booking details back into the Res Card. She prints out Ken's itinerary, and generates his invoice which automatically lands in TBO. Both Ken and Mary are amazed by how quickly this is all done!



When Ken phones about the trip, Sharon queries his profile, verifies his address, email, passenger, credit card, and phone information and clicks on the *Live Connect* icon on the menu bar from the Profile or inside a Reservation in Res Card.

After filling in the Live Connect vendor and adding a new reservation, Sharon goes on-line to book reservation. Profile information is passed to booking site in most cases and the reservation is made. Sharon clicks on Import Reservation and brings all reservation details back into the Res Card. She is now ready to print out Trip Proposals or generate invoices.





Quick Steps to Using Live Connect

Prior to using Live Connect in *ClientBase Online*, do set up consulting the help files inside CBO.

STEP ONE: Start a Live Connect Reservation:

When ready to book on-line, verify profile address, phone, email, passengers and credit card information.

STEP TWO: Click on *Live Connect*:

From the profile, click the *Live Connect* on the menu bar.

STEP THREE: Select the Live Connect Provider:

Select the Live Connect Provider you are using to book this reservation from the drop-down menu by *Connect To* and then click on *Create New Reservations*.

STEP FOUR: Select Customer Data You Need to Book the Reservation and Click *Connect*:

Presented with a profile data screen, check information in this screen to be passed to the booking engine. If no screen appears, then the information can be viewed in the upper gray part of the *ClientBase* window that the booking engine runs in, so that you can more easily re-key it into the booking engine if necessary.

STEP FIVE: Complete the Reservation & Import Data into *ClientBase*:

Complete the reservations using instructions supplied to you by the booking engine when you registered. Make sure you receive a confirmation number ensuring the reservations have been completed and click *Import Reservation*.

STEP SIX: Generate Itineraries (in progress) and Invoices:

All reservation data booked online is now located in the reservation fields in *ClientBase* for you to generate itineraries and invoices, and print reports.