



**TRAMS**

# ClientBase Online Overview



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# Welcome to ClientBase Online



This *ClientBase Online* 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 <http://www.trams.com/?section=prCbb>. 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 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.trams.com](http://www.trams.com) and clicking on the *Training* link.

TRAMS provides unlimited technical support by calling our team of highly trained support personnel at 310-641-8726 (Press 2), or e-mailing a question to [support@trams.com](mailto:support@trams.com). Let's face it, everyone learns in different ways and at different paces. Here at TRAMS, 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



The first screen to appear after signing in is the *ClientBase Online* Main Screen:

1. Browser Items

2. File Manager

3. Toolbar

4. Search Filters

5. Navigation Bar

6. Search Results

Count	Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry
View	L	Meyer/Sharon					
View	L	Steigler/Charles		Encino	CA	91436	
View	L	Steigler/Charles		Encino	CA	91436	
View	L	Sullivan/Marie		Scituate	MA	02066	
View	L	Sullivan/Tom		Palos Verdes	CA	90274	
View	L	Sundschuh/Lori		Long Beach	CA	90803	
View	L			Los Angeles	CA	90045	
View	L	Terris/Lynn		Redondo Beach	CA	90231	
View	L			Deep Space	CA	29212-1853	
View	L	Thompson/Jan		Manhattan Beach	CA	90266	
View	L	Thrasher/Matthew		Huntingn Beach	CA	90266	
View	L	Tiggs/Hazel		Los Angeles	CA	90008	
View	L	Tollis/Lynn					
View	L			Torrance	CA	90502	
View	L	Touch/Chris		Scottsdale	AZ	82558	
View	L	Crowley/Robert		Los Angeles	CA	90045	
View	L	Murphy/Sharon		Los Angeles	CA	90045	
View	L	Bagley/Dennis		Sparks	NV	89431	
View	L	Steiner/Mary		Los Angeles	CA	90045	
View	L	Urbie/Frank		Pasadena	CA	91104	

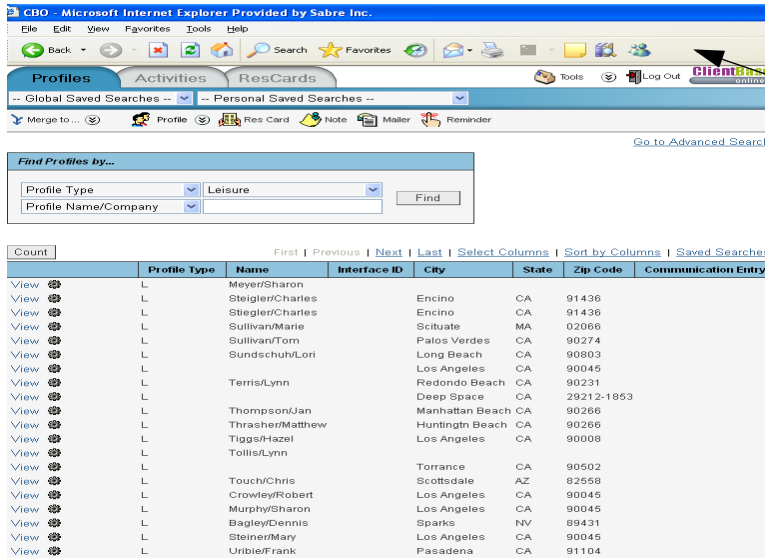
At the heart of *ClientBase Online* is the ability to locate, modify and use the information within your database. Your agency database contains a wealth of knowledge on past and present customer and vendor relationships. Being able to easily access and use this valuable information to maintain existing 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. Toolbar
4. Search Filters
5. Navigation Bar
6. Search Results

# 1. Meet the Online Items:

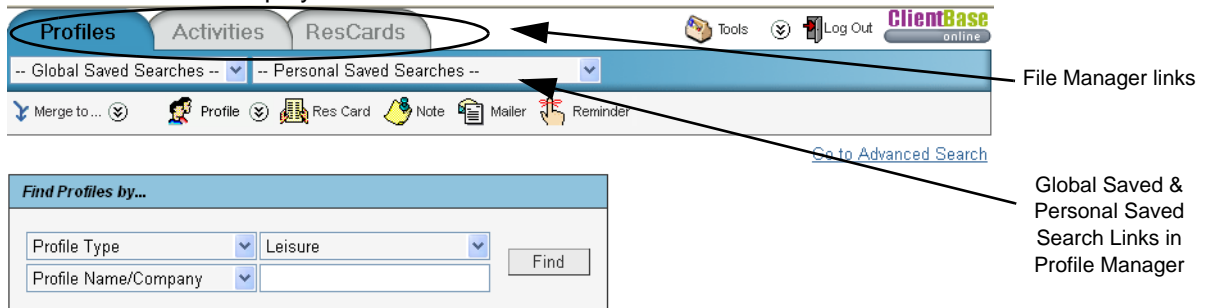


Located at the top of the screen are your browser items. Depending on what browser you are using, these items differ. They usually include a browser File Menu, Toolbar, and an Address area.

# 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.

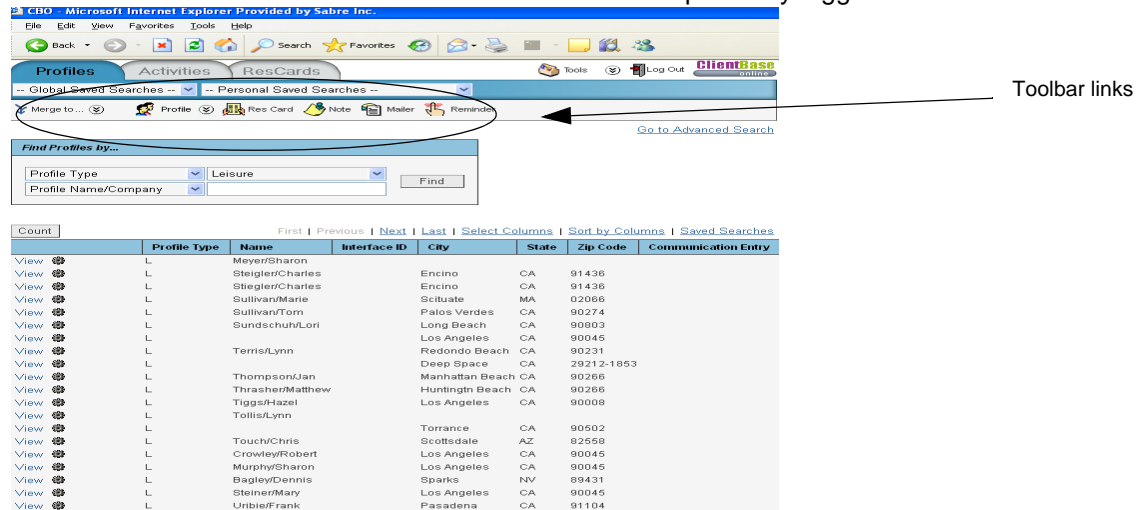


Count	Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry
View	L	Meyer/Sharon					
View	L	Stiegler/Charles		Encino	CA	91436	
View	L	Stiegler/Charles		Encino	CA	91436	
View	L	Sullivan/Marie		Scituate	MA	02066	
View	L	Sullivan/Tom		Palos Verdes	CA	90274	
View	L	Sundschuh/Lori		Long Beach	CA	90803	
View	L			Los Angeles	CA	90045	

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. Toolbar

The toolbar is made up of links to frequently used features. Directly above the toolbar is the *Login Name* information that identifies what ClientBase Online user is presently logged in.



The screenshot shows a web browser window displaying the ClientBase Online interface. The toolbar includes links for Merge to Doc, Profile, Res Card, Note, Mailer, and Reminds. Below the toolbar is a search results table with columns for Profile Type, Name, Interface ID, City, State, Zip Code, and Communication Entry. An arrow points from the text 'Toolbar links' to the toolbar area.

Count	Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry
View	L	Meyer/Sharon					
View	L	Stiegler/Charles		Encino	CA	91436	
View	L	Stiegler/Charles		Encino	CA	91436	
View	L	Sullivan/Marie		Scituate	MA	02086	
View	L	Sullivan/Tom		Palos Verdes	CA	90274	
View	L	Sundschuh/Lori		Long Beach	CA	90803	
View	L			Los Angeles	CA	90045	
View	L	Terris/Lynn		Redondo Beach	CA	90231	
View	L			Deep Space	CA	29212-1853	
View	L	Thompson/Jan		Manhattan Beach	CA	90266	
View	L	Thrasher/Matthew		Huntington Beach	CA	90266	
View	L	Tiggs/Hazel		Los Angeles	CA	90008	
View	L	Toilis/Lynn					
View	L			Torrance	CA	90502	
View	L	Touch/Chris		Scottsdale	AZ	82558	
View	L	Crowley/Robert		Los Angeles	CA	90045	
View	L	Murphy/Sharon		Los Angeles	CA	90045	
View	L	Bagley/Dennis		Sparks	NV	89431	
View	L	Steiner/Mary		Los Angeles	CA	90045	
View	L	Unibier/Frank		Pasadena	CA	91104	

**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.

#### Tools:

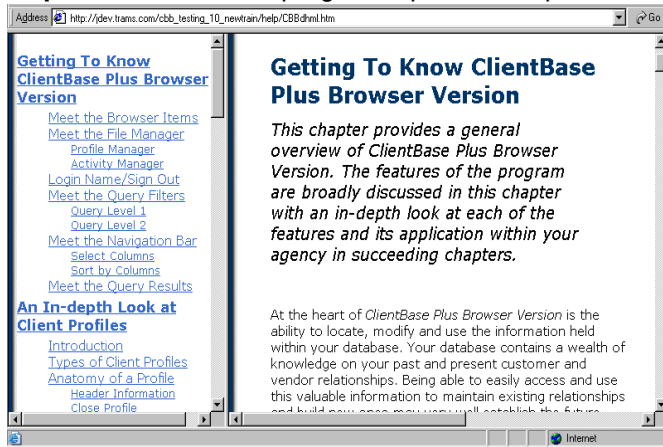
**Page History:** The page history area "remembers" the last places you have navigated to in the program. To quickly hop back into a recently visited area, simply click on that link.

**Settings:** Customize parts of the program.

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

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

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



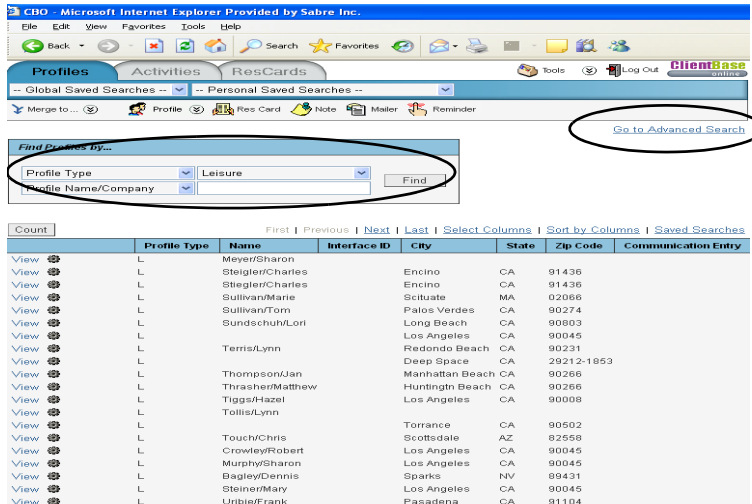
**About:** Gives details of version for support.

**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 Harry Ford, 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 “for”. Click *Find*. All Leisure Clients with the Last Name starting with “for” 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).

Click *View* to enter profile or the action menu icon (gear) for other profile options.

Count	Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry
<a href="#">View</a>	L	Foran/Dave	2138743298	Manhattan Beach	CA	90266	+1 (213) 874-3298
<a href="#">View</a>	L	Ford/Harrison	4075551234	Cody	WY	58234	+1 (407) 555-1212

**Profile Record: 473**  
[Edit](#) [View Activities](#) [Merge to PNR](#) [Merge to Document](#) [Merge to E-mail](#) [Live Connect](#)  
[New Res Card](#) [New Note](#) [New Mailer](#) [New Reminder](#)

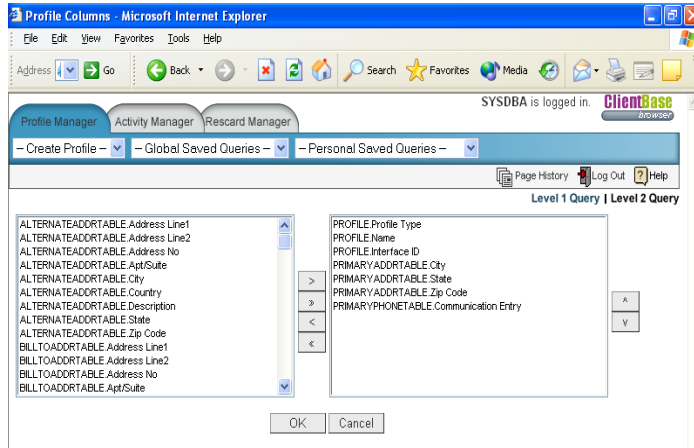
**Advanced Search:** Advanced Search provides additional filters to more narrowly define your search. Search filters are selected by clicking on *Enter Date to Search by* and then completing as many of the search criteria fields as desired. Each field selected is strung together with an “and” which more 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*:

## Select Columns

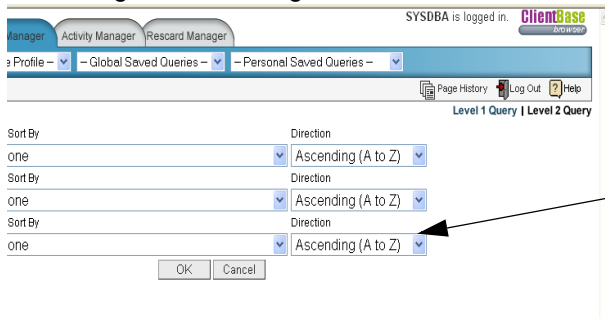
Click *Select Columns* to choose which columns you want displayed in the Search Results screen.



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.

## 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 "Mc". The Search Results displays all Leisure clients in the database whose last name

## ClientBase Online Overview

begins with “Mc” 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 the ClientBase Online search interface. At the top, there are tabs for Profiles, Activities, and ResCards. Below the tabs, there are search filters for Global and Personal Saved Searches. A search bar contains the text "mc". Below the search bar, there are icons for Merge to..., Profile, Res Card, Note, Mailer, and Reminder. A "Go to Advanced Search" link is visible. Below the search bar, there is a "Find Profiles by..." section with dropdown menus for Profile Type (Leisure) and Profile Name/Company (mc), and a "Find" button. Below this, there is a table of search results with columns: Profile Type, Name, Interface ID, City, State, Zip Code, and Communication Entry. An arrow points to the "Communication Entry" column with the label "Search Results".

Count	Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry
View	L	McGrath/Michael	45454545	Manhattan Beach	CA	90266	+1 (213) 721-3998
View	L	McGraw/Nancy		Oceanside	CA		
View	L	McCarthy/David	2133764362	Manhattan Beach	CA	90266	+1 (213) 376-4362
View	L	McDonald/Heather		Buena Park	CA	90211	+1 (213) 597-4512
View	L	McArthur/Sean		Manhattan Beach	CA	90263	+1 (213) 387-6163
View	L	McCarthy/Carlin		Manhattan Beach	CA	90266	+1 (213) 376-4362

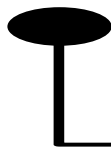
In this next example, we are working in Activities and have entered our desired search filters. The Search Results displays all activities in the database that are Open Reminders for agent Sharon. To select a record appearing within the results screen, click *View* or the action menu icon (gear) next 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.

The screenshot shows the ClientBase Online Activities screen. At the top, there are tabs for Profile Manager, Activity Manager, and Rescard Manager. Below the tabs, there are search filters for Global and Personal Saved Queries. A search bar contains the text "SHARON". Below the search bar, there are icons for Merge to File, Print, Page History, Log Out, and Help. A "Level 1 Query | Level 2 Query" link is visible. Below the search bar, there is a "Custom Query" section with a "Level 1 Filters" section. The filters include Login Name (SHARON), Select (Open Reminders Only), From Date, and To Date. A "Refresh" button is visible. Below the filters, there is a table of activities with columns: Type, Login/Created Name, Name, Activity DateTime, Subject, Reminder Type, Duration, and To Do. An arrow points to the "Reminder Type" column with the label "Open Reminders".

Type	Login/Created Name	Name	Activity DateTime	Subject	Reminder Type	Duration	To Do
View	R SHARON	Sharp/Janice	6/5/04				X
View	R SHARON	Norris/Keith	12/17/02 9:00 AM	Welcome Home	Phone Call	5	
View	R SHARON	Dechter/Brad	11/26/02 9:00 AM	Welcome Home	Phone Call	5	
View	R SHARON	Mathis/Steve	3/8/03	Final Payment Due		0	
View	R SHARON	Kazamek/Tom	10/15/02 9:45 AM	Trip Inquiry Follow-Up	Phone Call	5	
View	R SHARON	Randolph/Sam	6/18/04	Final Payment Due			X
View	R SHARON	McCarthy/David	10/23/02 12:15 PM	bi-Annual Touch Base	Phone Call	5	

## 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 the *Create Profile* icon on the toolbar, and clicking the *Profile Type* you want to create from the drop-down menu.

The screenshot shows the ClientBase Online interface with the 'Profiles' tab selected. A toolbar contains icons for Profile, Res Card, Note, Mailer, and Reminder. A 'Create Profile' icon is circled in red. An arrow points from this icon to a dropdown menu with the following options: Leisure, Corporate, Service Provider, Vendor, Agent, and Other. Below the toolbar is a search form for profiles with fields for Profile Type (Leisure) and Profile Name/Company. Below the search form is a table of profiles with columns: Count, Profile Type, Name, Interface ID, City, State, Zip Code, and Comm.

Count	Profile Type	Name	Interface ID	City	State	Zip Code	Comm
View	L	Meyer/Sharon		Encino	CA	91436	
View	L	Stegler/Charles		Encino	CA	91436	
View	L	Sullivan/Charlie		Encino	CA	91436	
View	L	Sullivan/Marie		Scituate	MA	02066	
View	L	Sullivan/Tom		Palos Verdes	CA	90274	
View	L	Sundschuh/Lori		Long Beach	CA	90803	
View	L			Los Angeles	CA	90045	
View	L	Terris/Lynn		Redondo Beach	CA	90231	
View	L			Deep Space	CA	29212-1853	
View	L	Thompson/Juan		Manhattan Beach	CA	90266	
View	L	Thrasher/Matthew		Huntingtn Beach	CA	90266	
View	L	Tiggs/Hazel		Los Angeles	CA	90008	
View	L	Tollis/Lynn					
View	L			Torrance	CA	90502	
View	L	Touch/Chris		Scottsdale	AZ	82550	
View	L	Crowley/Robert		Los Angeles	CA	90045	
View	L	Murphy/Sharon		Los Angeles	CA	90045	
View	L	Bagley/Dennis		Sparks	NV	89431	
View	L	Steiner/Mary		Los Angeles	CA	90045	
View	L	Uribe/Frank		Pasadena	CA	91104	

## 2. Activities

The screenshot shows the ClientBase Online interface with the 'Activities' tab selected. A toolbar contains icons for Profile, Res Card, Note, Mailer, and Reminder. Below the toolbar is a search form for activities with fields for Login Name (SHARON), Select (Open Reminders Only), From Date, and To Date. Below the search form is a table of activities with columns: Count, Type, Login/Created Name, Name, Activity DateTime, Subject, and Remind.

Count	Type	Login/Created Name	Name	Activity DateTime	Subject	Remind
View	R	SHARON	Evans/Gary	1/2/27/01	Trip Inquiry Follow-Up	
View	R	SHARON	Evans/Gary	1/9/02	Deposit Due	
View	R	SHARON	Ammaral/Steve	1/1/0/02	Welcome Home	Task
View	R	SHARON	Burdan/Greg	1/1/0/02	Final Payment Due	Task
View	R	SHARON	Ford/Harrison	1/1/0/02	Bi-Annual Touch Base	Phone Cal
View	R	SHARON	Funjet Vacabons	1/1/0/02	Marketing Promo Decision	E-Mail
View	R	SHARON	Chase/Herb	1/1/0/02	Trio Inquiry Follow-Up	Phone Cal

Accessing Activities allows you to search and manage your database of marketing 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.

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

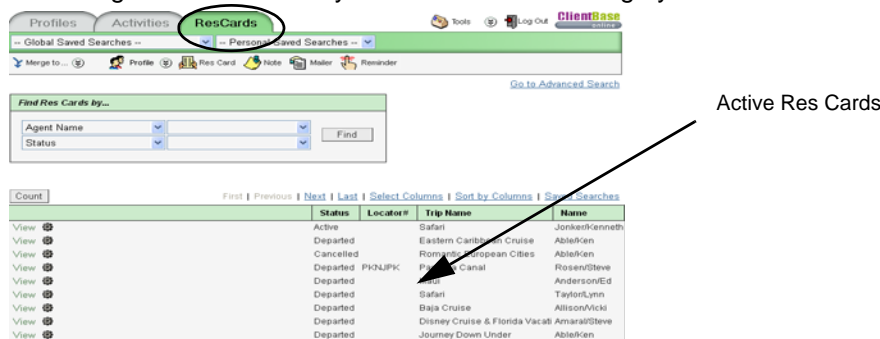
Activities and refreshing the search, by default the system queries open Reminders for the current User Login, thus providing an instant detailed “To-Do” list.

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.

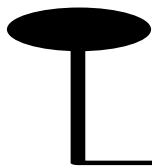
Accessing Res Cards allow you to search and manage your database of Res Cards.



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: David Foran calls to plan a surprise getaway with his wife, Barbara, 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.**

The screenshot displays the ClientBase Online interface for a user profile. The profile is for 'Mr. and Mrs. Dave Foran' located at 3619 Crest, Manhattan Beach, CA 90266. The interface includes several tabs: Profiles, Activities, ResCards, and Tools. The 'General' tab is active, showing contact information and interface ID. A sidebar on the right contains a 'More about' section with a 'Travel History' link circled in red. Below the profile information, there are sections for 'Address', 'Communications', and 'Special Dates'. At the bottom, a 'Travel History' table is visible, showing a list of past travel bookings with columns for Invoice Type, Issue Date, Invoice Number, Travel Category, Total Fare, and Commission.

Invoice Type	Issue Date	Invoice Number	Travel Category	Total Fare	Commission	Confirm N
Sale	08/26/2002	99999	Tour	66.00	0.00	7B7X1004
Sale	02/23/2001	100012	Tour	200.00	0.00	7B7X1004
Sale	01/26/2000	9177	Air	198.00	18.00	



## 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 *Create New Profile* icon on toolbar, 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.

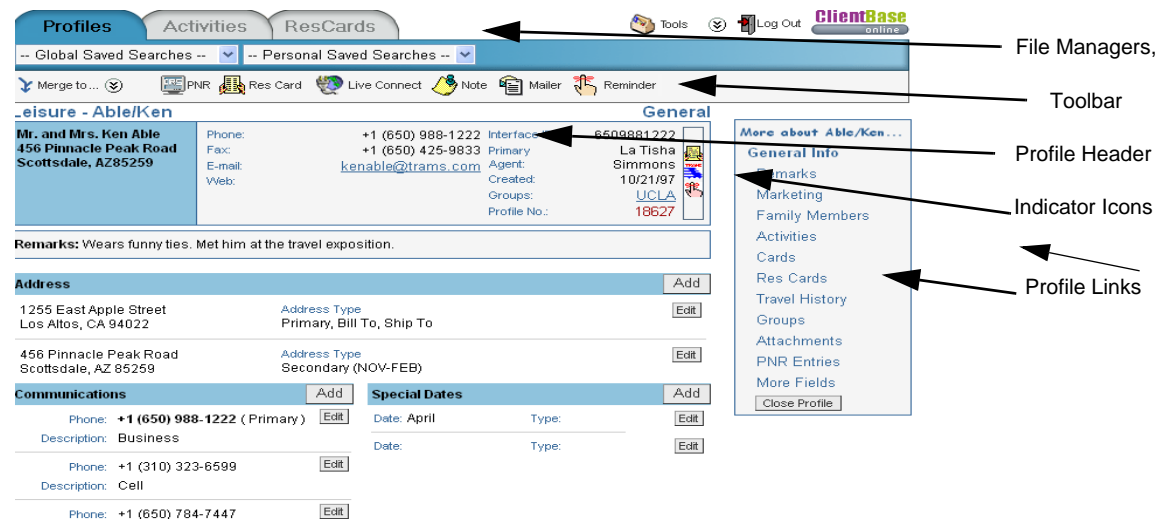
**Advanced Search** sorts on multiple fields. Click *Go to Advanced Search*, then *Enter Data to Search by* if you need more than two fields to retrieve a profile, or when the only known information is a field not used in the Simple Search. Complete as many of the search criteria fields as desired. Each 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



1. File Managers, Toolbar, 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.

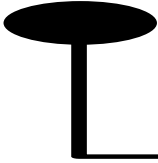
**l. More Fields:** If you want to track it, and *ClientBase* doesn't ask for it, here is where you can create your own customized fields of information. Things like Social Security numbers, client UDID's and other miscellaneous information that you want to track can be captured in these fields.

### **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.



**Example: Ken Able calls your agency to book some flights to Paris. Your agent, Susan, first locates Ken's profile in your marketing database (*ClientBase*) and verifies current address, phone, email, passenger and card 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 software interface. On the left, a customer profile for 'Mr. and Mrs. Ken Able' is displayed, including contact information and addresses. On the right, a 'Merge to PNR' configuration window is open, showing a list of profile entries with checkboxes to select which data to include in the PNR. An arrow points from the 'Merge to PNR' button in the top toolbar to the configuration window. Another arrow points from the 'Merge to PNR' button to the 'Merge to PNR' button in the configuration window.

**Profile Information:**  
 Name: Mr. and Mrs. Ken Able  
 Address: 1255 East Apple Street, Los Altos, CA 94022  
 Phone: +1 (650) 988-1222 (Primary)  
 Email: kenable@trams.com (Primary)

**PNR Merge Configuration:**  
 5.S\*SASMM  
 5.S\*DP40  
 \$BILL TO ADDRESS+ MR AND MRS KEN ABLE 1255 EAST APPLE STREET LOS ALTO CA 94022  
 \$SHIP TO ADDRESS+ MR AND MRS KEN ABLE 1255 EAST APPLE STREET LOS ALTO CA 94022  
 9650-784-7447-H  
 \$INTERFACE ID+ 6509881222  
 \$S384+\$S  
 \$SABRE  
 \$AFTER HOURS SERVICE CALL 800-555-1212  
 5.S\*SASMM  
 5.S\*DP40

Susan locates Ken's profile, confirmed his address, email, phone, passenger & card information and then clicks the CRS icon in toolbar to send his profile data to the PNR.

This screen displays all Profile, Passenger, Branch and Agent entries available for sending into the current PNR. Global PNR Rules, setup by the agency, determine what type of data is included and how it should be formatted.

All Susan needs to do is place a check mark next to the fields that she would like to include, then click Finish.



## 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 the Merge to PNR icon in toolbar:

Click *PNR* icon in toolbar. 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:

**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.)

**Special Note to MySabre Users:** You must first enable the MySabre API. Display the Configuration from the Options menu of the Emulator and select MySabre API by placing a checkmark and clicking OK. A message informs you to log out and log in again to activate the MySabre API. In CBO, go to Tools|Agency Settings|Merge to PNR Settings. Select Sabre as the Reservation System and *Use MySabre API* from the drop-down listing.

In order to integrate with ClientBase, use your mouse to toggle between open PNR and ClientBase **NOT** <Alt><Tab>.

**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.

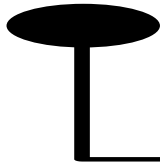
**STEP TWO:** Click *Add* and fill in the following fields:

**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,

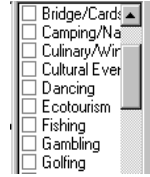
if desired, by clicking the "Additional Entries Link" in the Merge to PNR feature. **PNR Entry:** Enter the PNR entry the way you would in your reservation system and then Save.



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!**

<b>1. When?</b>			
<input type="checkbox"/> Spring	<input checked="" type="checkbox"/> Summer	<input checked="" type="checkbox"/> Fall	<input type="checkbox"/> Winter
<input type="checkbox"/> Last Minute			
<b>2. Where?</b>			
<input checked="" type="checkbox"/> Africa	<input checked="" type="checkbox"/> Asia	<input type="checkbox"/> Bermuda	<input type="checkbox"/> Canada
<input checked="" type="checkbox"/> Caribbean	<input type="checkbox"/> Central/So America	<input type="checkbox"/> Europe/Eastern	<input type="checkbox"/> Europe/Brit,Ireland
<input type="checkbox"/> Europe/Mediter	<input checked="" type="checkbox"/> Europe/Scandinavia	<input type="checkbox"/> Europe/Western	<input type="checkbox"/> India
<input checked="" type="checkbox"/> Mexico	<input type="checkbox"/> Mideast/Isreal	<input type="checkbox"/> Mideast/Other	<input type="checkbox"/> SoPacific
<input checked="" type="checkbox"/> Transcanal	<input checked="" type="checkbox"/> USA/Alaska	<input type="checkbox"/> USA/California	<input type="checkbox"/> USA/Disney
<input type="checkbox"/> USA/Florida	<input type="checkbox"/> USA/Hawaii	<input type="checkbox"/> USA/Las Vegas	<input type="checkbox"/> USA/New England
<input type="checkbox"/> Australia/New Zealan			
<b>3. With Whom?</b>			
<input type="checkbox"/> Single:Young	<input type="checkbox"/> Single:Mature	<input type="checkbox"/> Single:SrCitizen	<input type="checkbox"/> Single:Parent
<input type="checkbox"/> Couple:Young	<input checked="" type="checkbox"/> Couple:Mature	<input type="checkbox"/> Couple:SrCitizen	<input checked="" type="checkbox"/> Family:Young
<input type="checkbox"/> Family:Teens			
<input type="checkbox"/> Client			
<b>4. What Type?</b>			
<input checked="" type="checkbox"/> Cruise	<input checked="" type="checkbox"/> Package	<input checked="" type="checkbox"/> FIT	<input type="checkbox"/> Tour-Escorted

Check/Uncheck interests as you talk with client.



## 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.

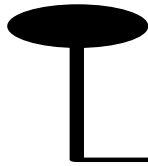
### **STEP TWO:** View and Select Global Marketing Tables and Codes

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: Celeste Pauwels, a long-time agency customer, is coming in this afternoon to talk about the possibility of booking a cruise. She's looking for some fresh ideas on an exciting new travel experience. You quickly access her profile in ClientBase and checkout her Travel History. From here you determine if she 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 her past travel tendencies. Next, you review her marketing preferences and by the**

**time Celeste arrives at your desk, you feel prepared and confident in making a travel recommendation she can't refuse.**

The screenshot shows the ClientBase Online interface. The top navigation bar includes options like 'Create Profile', 'Global Saved Queries', and 'Personal Saved Queries'. The main content area displays the profile for 'Ms. Celeste Pauwels' with contact information and a 'General' tab. A sidebar on the right contains a list of navigation links: 'Close Profile', 'General Info', 'Travel History', 'Marketing', 'Family Members', 'Activities', 'Cards', 'Res Cards', 'Travel History', 'Groups', and 'Attachments'. An arrow points from the 'Travel History' link to a text box that says: 'At a glance you can see Celeste has Travel History by viewing the Indicator Icon. By clicking on it, you enter her Travel History link quickly.'

Below the profile, there are sections for 'Communications', 'Special Dates', 'Additional Info', and 'Profile Status'. The 'Marketing' section is expanded, showing various preference categories:

- 1. When?**
  - Spring
  - Summer
  - Fall
  - Winter
  - Last Minute
- 2. Where?**
  - Africa
  - Asia
  - Bermuda
  - Canada
  - Caribbean
  - Central/So America
  - Europe/Eastern
  - Europe/Brit/Ireland
  - Europe/Mediter
  - Europe/Scandinavia
  - Europe/Western
  - India
  - Mexico
  - MidEast/Ireal
  - MidEast/Other
  - SoPacific
  - Trans/Canal
  - USA/Alaska
  - USA/California
  - USA/Disney
  - USA/Florida
  - USA/Hawaii
  - USA/Las Vegas
  - USA/New England
  - Australia/New Zealand
- 3. With Whom?**
  - Single:Young
  - Single:Mature
  - Single:Scitizen
  - Single:Parent
  - Couple:Young
  - Couple:Mature
  - Couple:Scitizen
  - Family:Young
  - Family:Teens
  - Client
- 4. What Type?**

An arrow points from the text 'Review Celeste's travel preferences by entering the Marketing Link.' to the 'Marketing' link in the sidebar.



## 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

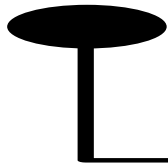
By default all past Travel History is displayed in the link, invoice by invoice, booking by booking. Click *Search* to display. In addition to the listing of past purchases, Sales and Commission Totals and Averages are displayed. The *Sort* controls the way the search results are displayed on the screen. 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.

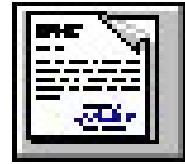
Travel Categories can also be used as search criteria (e.g. “show me only cruise history”) by checking/unchecking any item from the travel category list. Click *Search* to update your results.



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 Doc* in toolbar. 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* icon on the toolbar. c) Querying a **group** of profiles in Profiles and clicking the *Merge to* area on toolbar.

**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.

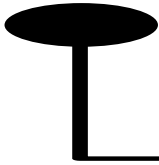
**STEP TWO:** Designate the fields and sorts to include within the file for each record in your results by using *Select Columns* to add or remove the fields within columns as desired. To change the sorting, use *Sort by Columns* to setup to three levels of sorting criteria.

**STEP THREE:** Click *Merge to File* from the toolbar 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:



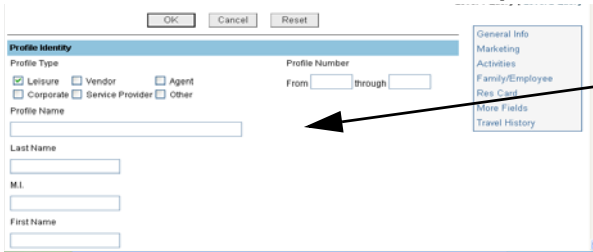
# E-mail Blast - 21st Century Communication (Not Yet Available)



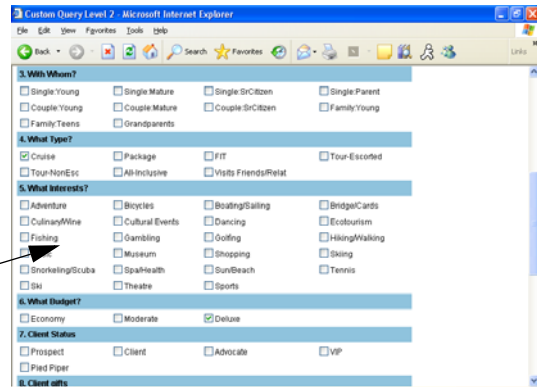
Your agency has built a valuable database by consistently collecting and recording client data. Now it is time to put that data to work for you! Save valuable time by using the *ClientBase* E-mail "blast" which allows you to send one E-mail to any number of profiles at the same time.



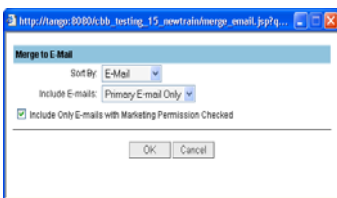
**Example:** Your agency has just received a hot, new, Bermuda cruise special at a great price. You need to notify all your deluxe cruisers as soon as possible so that they can take advantage of this terrific deal. Your agent, Michael, first locates all the deluxe cruisers in your database by using Advanced Search. He checks the results and clicks *Merge to E-mail* on the toolbar. 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.



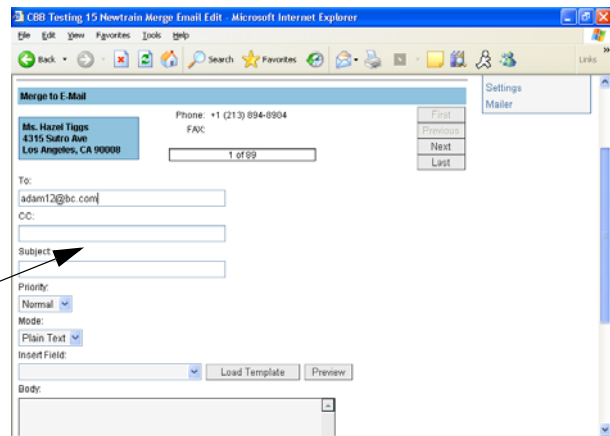
Michael clicks on Advanced Search. He clicks the Profile Type of "Leisure."



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



From the Results Screen, Michael Clicks on Merge to E-mail on the toolbar 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.



## 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 on the Toolbar of Profiles.

### 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.



**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.



**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.



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*.

The screenshot shows the ClientBase Online interface. At the top, there are navigation tabs for 'Profiles', 'Activities', and 'ResCards'. Below these are search filters for 'Global Saved Searches' and 'Personal Saved Searches'. The main content area displays a reminder for 'Mr. and Mrs. Dan Costa' with details such as phone number (+1 (714) 730-9622), address (946 W. 7th Avenue, Vancouver, BC V5Z1C3), and login name (SHARON). The reminder is scheduled for 01/12/2002 at 12:00 AM. A 'View' button is located to the right of the reminder details. A callout box with an arrow points to the 'Go to Profile' button within the 'View' button's dropdown menu.

Sharon can easily toggle between her To-Do list and the profiles the Reminders are created for by clicking *Go To Profile* in the activity screen.



## 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 toolbar from 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 *Create Note icon* on the toolbar 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.

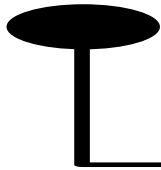
Start by clicking *View* next to the Reminder to enter. Hot-key to the attached profile by clicking *Go To Profile*. From the profile, access phone information, as well as other key data that adds the personal touch necessary for effective marketing. Click on the *Activities* link of the profile to refresh 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.



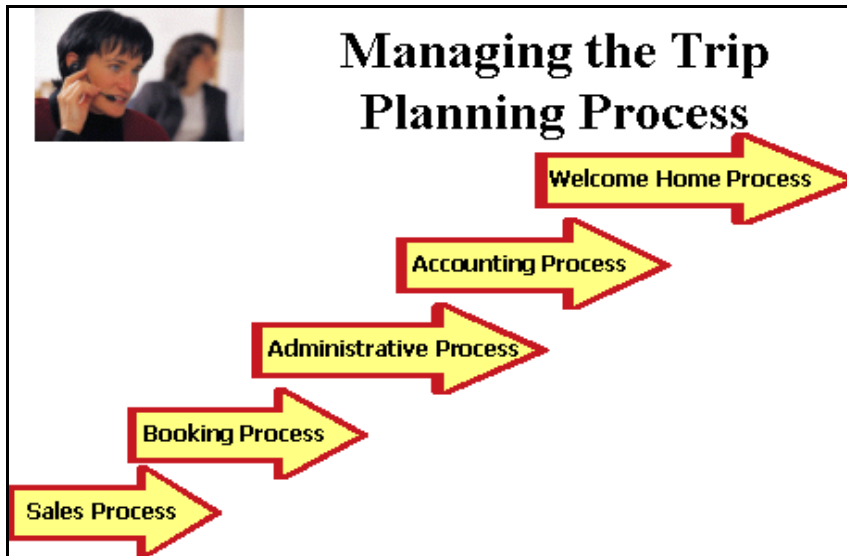
Scheduling your day by making lists, following up on leads, and working in a way to finish what you start, is a gift you give yourself. This approach fosters good habits that enrich your client relationships. *Activities* open the door to a greater understanding of our clients -and greater profits for agents and agencies.



## Manage the Trip Planning Process with Res Cards



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: Michael McGrath 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 Michael in *ClientBase Online*. Every time Sharon has contact with Michael or any vendors/suppliers about this trip, she calls up Michael'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 an itinerary (in progress). 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.**

Profiles   Activities   ResCards   Tools   Log Out   ClientBase

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

Merge To...   **Res Card**   Live Connect   Note   Mailer   Reminder

**Leisure - McGrath/Michael**   General

Mr Michael McGrath   Phone: +1 (213) 721-3998   Message ID: 45454545  
 224 17th Place   Fax:   Primary Agent: Sharon Meyer  
 Manhattan Beach, CA90266   E-mail: 10/21/97   Created:  
 Web:   Groups: COMMERCIAL   Profile No.: 6

Remarks:

**Address**   Add

224 17th Place   Address Type: Primary, Bill To, Ship To   Edit

**Communications**   Add   **Special Dates**   Add

Phone: +1 (213) 721-3998 (Primary)   Edit   Date:   Type:   Edit  
 Description: Phone   Date:   Type:   Edit

**Additional Info**   Edit   **Profile Status**

Profile Name: McGrath/Michael   Profile Status: Active

More about McGrath/Michael...  
 General Info  
 Remarks  
 Marketing  
 Family Members  
 Activities  
 Cards  
 Res Cards  
 Travel History  
 Groups  
 Attachments  
 PNR Entries  
 More Fields  
 Close Profile

When Michael phones about the trip, Sharon queries his profile, verifies his address and phone information and goes and clicks on *Create Res Card* icon from toolbar 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 "lead") and puts in all details she learns about Michael's preferences. She creates a Reminder to call Michael sometime in the future to follow-up.

-- Create Rescard --   -- Global Saved Queries --   -- Personal Saved Queries --   Level 1 Query 1 Level 2 Query

Save   Cancel

**Res Card**

Agent	Status	Create Date	Branch
Kim	Active	3/3/04	[0]Travel With The Stars

Reservation Cycle:   -Reservation Cycle Sel-

Source of Booking:   -Source of Booking Sel-

Group:   -Group Sel-

Region:   -Region Sel-

Prepared for:   Go To Profile   Trip Name   Locator No.  
 [6] McGrath/Mike   Trip Name   Locator No.

Ship to Address  
 Mr and Mrs Mike McGrath

Travel With Stars  
 5777 W. Century Blvd., Suite 1200  
 Los Angeles, CA 90045

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 Michael 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 an itinerary (in progress) or invoice for Michael. 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 *Create Res Card* icon from toolbar. 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

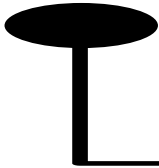
Once any reservations have been booked, use *Reminders* to schedule and organize all the administrative tasks you need to do such as checking deposit, final payment, waitlists and documents. Under the *Activities link*, click *Create Activity*, and choose *Reminder* from the drop-down list to create 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

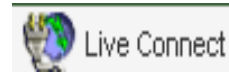
At any point in the trip planning process, generate itineraries (in progress) or invoices. Once generated, the invoices automatically drop into TRAMS Back Office.

### **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

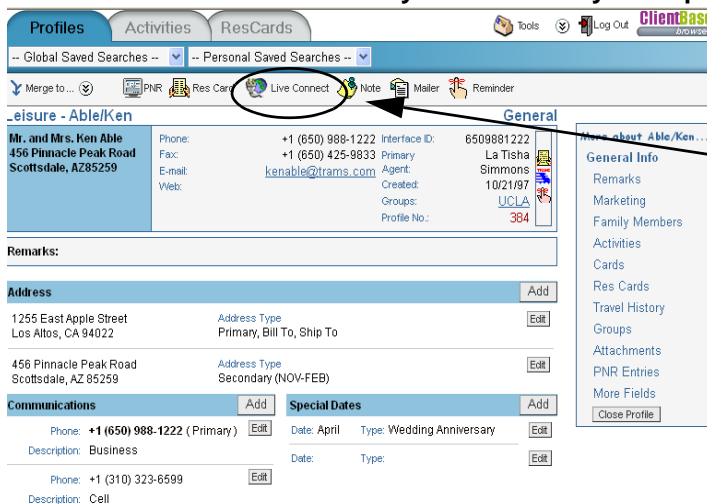


One of the most innovative features in *ClientBase Online* is Live Connect in the Res Card. Save time and improve efficiency by transmitting selected client information to a booking engine on-line. Then electronically transmit back reservation details and automatically complete the reservation form with 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*.)

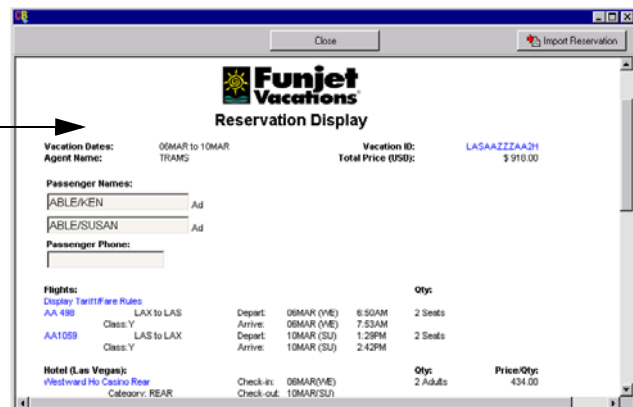
Currently ClientBase dozens of Live Connect Providers available for use, but continues to add more on-line booking engines all the time. (Please refer to the help files inside the program, or manual for a current list of Live Connect Providers.)



**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!**



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 itineraries (in progress), generate invoices, or get reports from her reservation data.





## 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* icon on toolbar.

### **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.