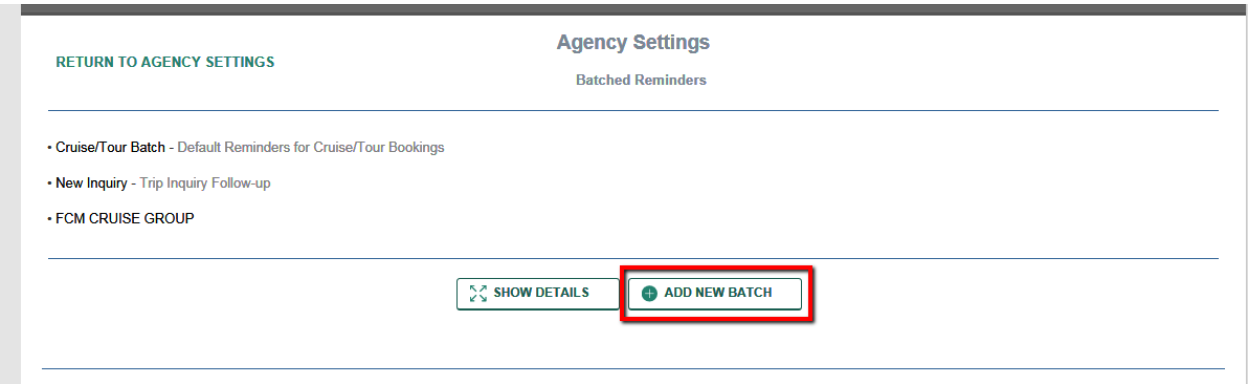
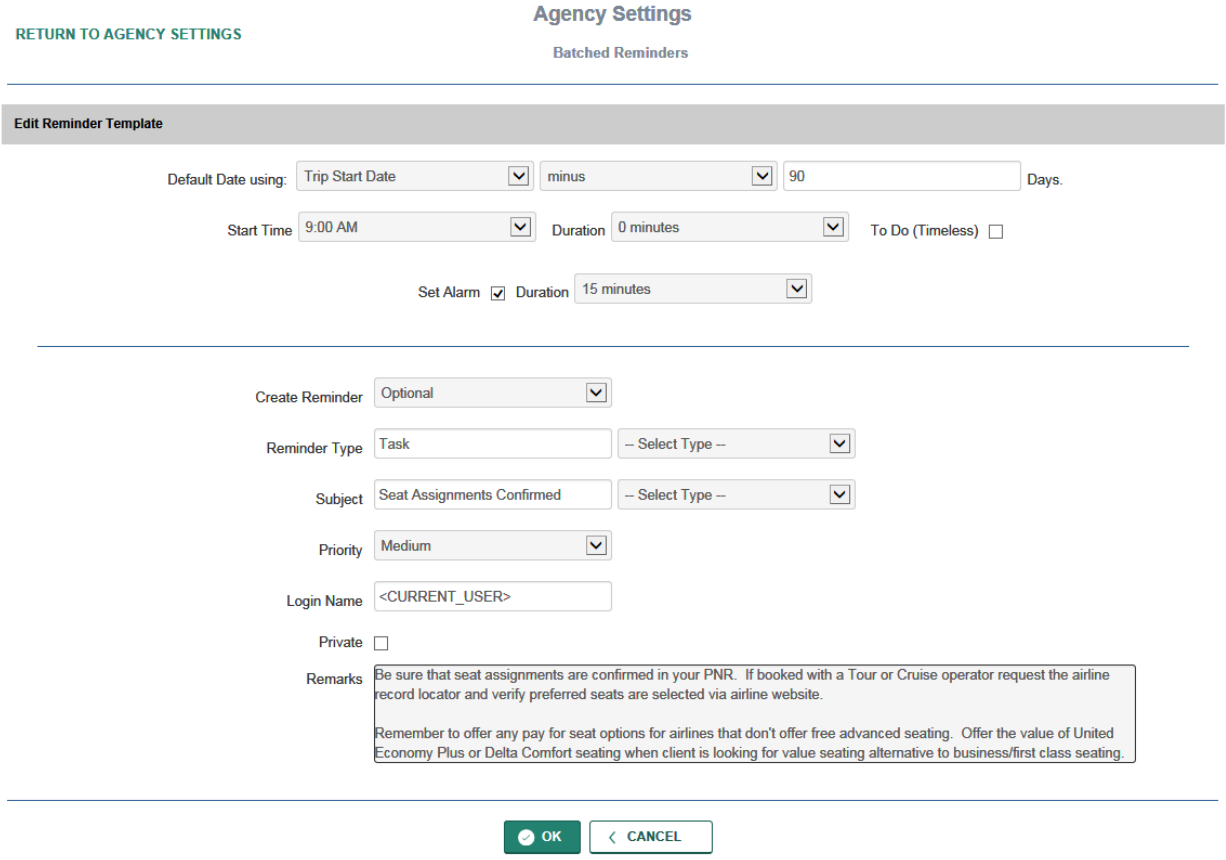
Batched Reminders setup in ClientBase Online

Go to Tools > Settings > Res Card Defaults > Batched Reminders:





Reminder Date: These Global Reminder settings need to use Merge fields for dates. When launching the Batched Reminders from within a Res Card, the appropriate Reminder Date will be calculated and

populated. This defaulted date for the Reminder can be changed at the time of creating the Batched Reminders, just before Creating and Saving them to the Res Card Activities tab.

Default Date Using: Select from: Current Date, Res Card Create Date, Res Card Start Date, or Res Card Return Date.

Plus/Minus: Select plus or minus from the drop-down.

Number of Days: Enter a number from 1 to 2000

For example: I*f you want to create a reminder to follow up with a client to see how their trip went, you might choose to use "Res Card Return Date Plus 7 days." When this reminder is added to the Res Card, it will create a reminder that will pop up one week after the client has returned home.*

Create Reminder: Select **Always or Optional.** When launching a Batch of Reminders from a Res Card, a listing of the default Reminders appears. To be created, each Reminder within the listing must be selected. If this field is set to Always, then the selection box for this Reminder will be checked by default. If this field is set to Optional, then the selection box for this Reminder will not be checked by default.

The remaining fields are identical to those fields included in a single Reminder Record. Complete each field and the Reminder populates the field upon creating the Batched Reminders within a Res Card. Enter default entries for: **Timeless, Start Time, Duration, Login Name, Priority, Private, Reminder Type, Subject, Set Alarm, Completed and Remarks.** Click **OK** to save your first Reminder within this Batch.

Tip: If you are an agency database administrator, you may want to consider adding a remark message to remind travel advisors of the importance of said reminder. Another nice feature is that this message will also show up when the reminder pops up if they are syncing reminders with their e-mail calendar.

Here is an example message for a reminder to confirm seat assignments:

Be sure that seat assignments are confirmed in your PNR. If booked with a Tour or Cruise operator request the airline record locator and verify preferred seats are selected via airline website.

Remember to offer any pay for seat options for airlines that don't offer free advanced seating. Offer the value of United Economy Plus or Delta Comfort seating when client is looking for value seating alternative to business/first class seating.

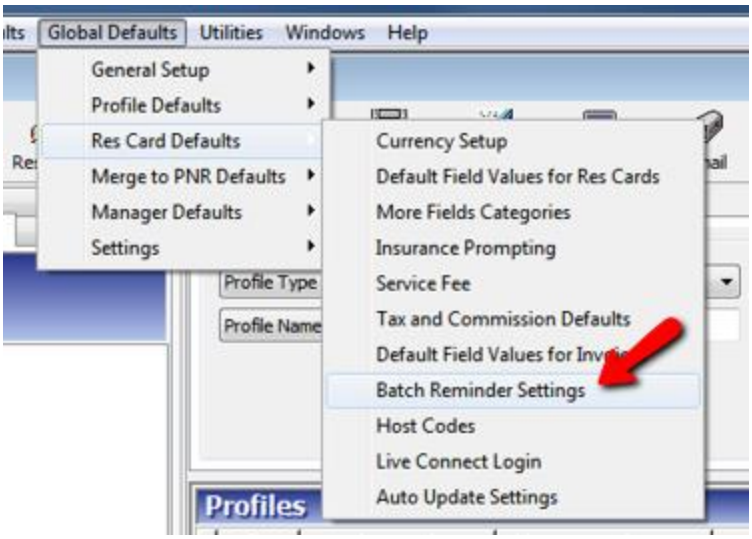
Continue to add as many default Reminders as you would like included within this Batch of Reminders

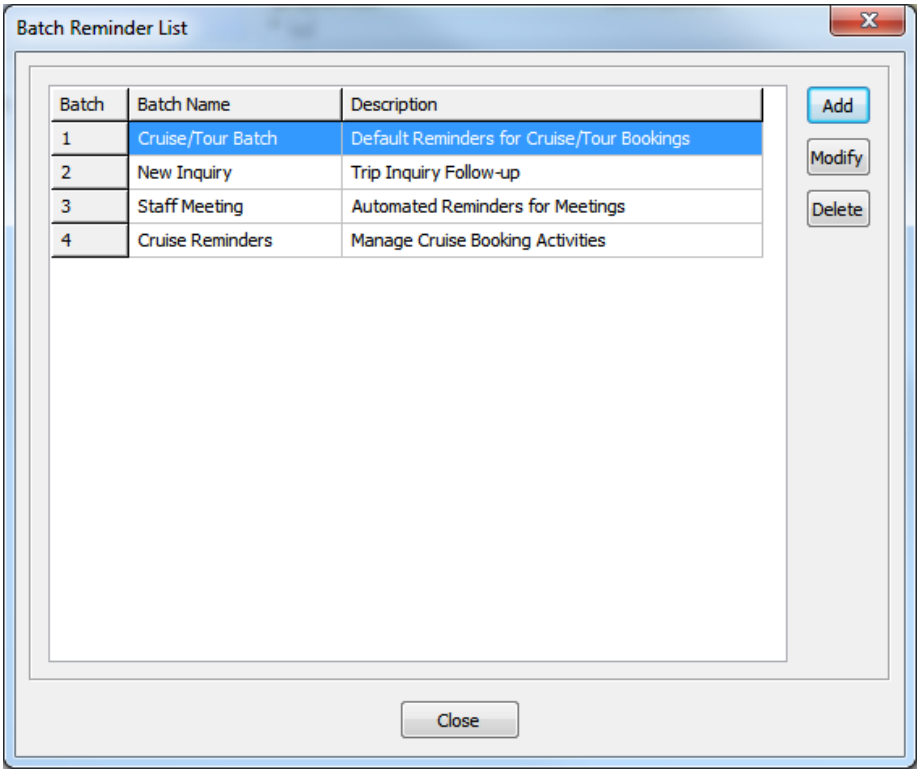
After each default Reminder is created for this batch, click **Save Changes** to save the Batch. Create more than one Batch of Reminders if desired. For example, if you would like different default Reminders for a Tour booking then for a Cruise booking, or for reminders specific to Group bookings, or even for Trip Inquiry follow up reminders, then add another Batch of Reminders accordingly.

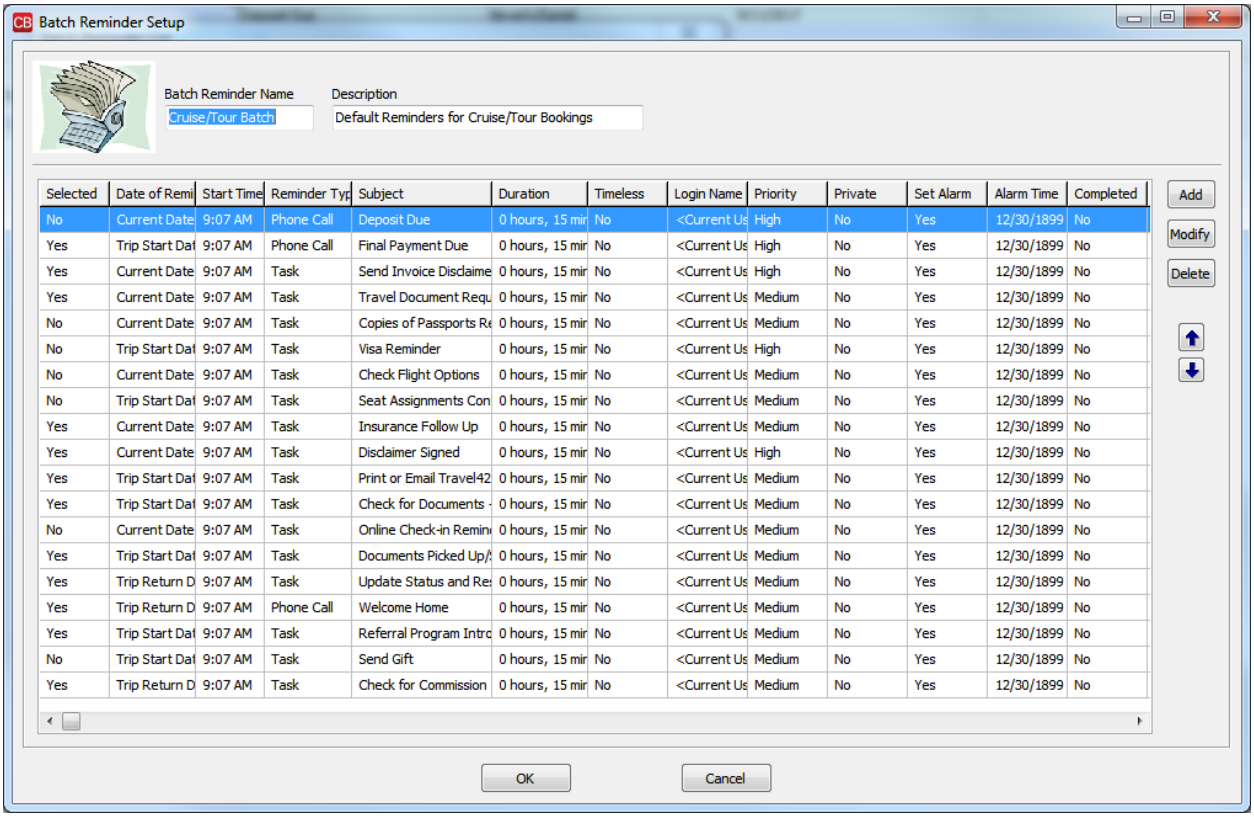
*If your agency syncs between ClientBase Windows and ClientBase Online, then you will need to set up your Batched Reminders from ClientBase Windows.

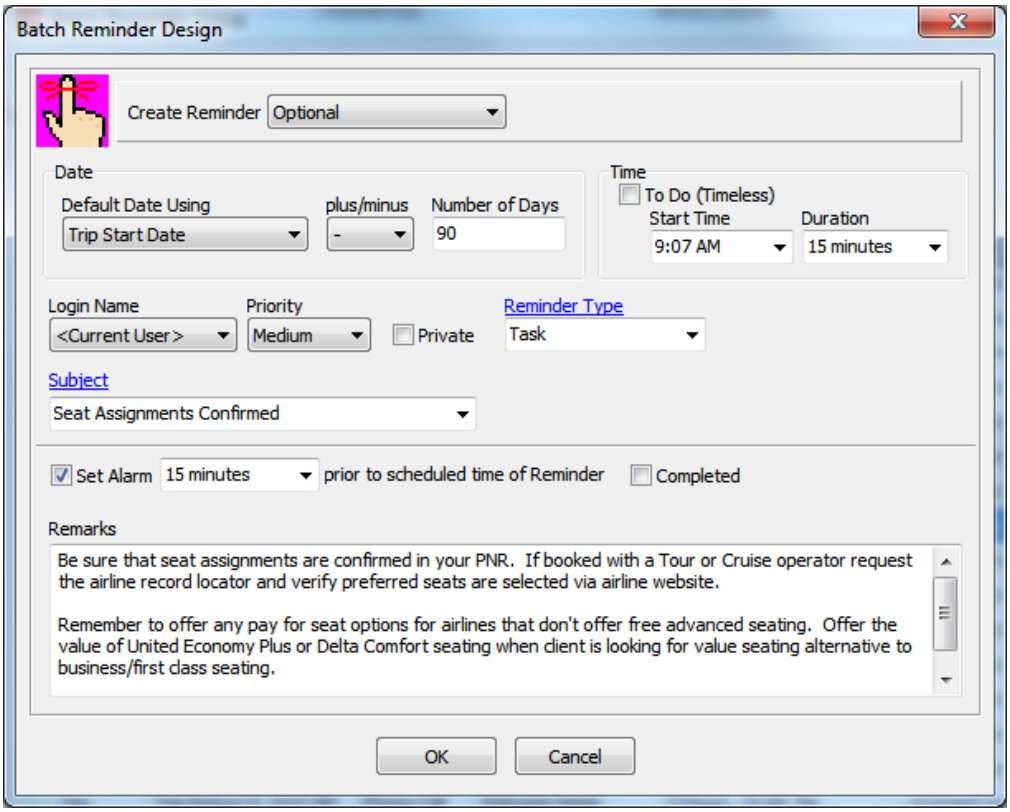
Batched Reminders setup in ClientBase Windows

Global Defaults > Res Card Defaults > Batched Reminder Settings


Global Defaults
Utilities
Windows
Help
General Setup
Profile Defaults
Res Card Defaults
Merge to PNR Defaults
Manager Defaults
Settings
Currency Setup
Default Field Values for Res Cards
More Fields Categories
Insurance Prompting
Service Fee
Tax and Commission Defaults
Batch Reminder Settings
Host Codes
Live Connect Login
Auto Update Settings
Profile Type
Profile Name
Profiles

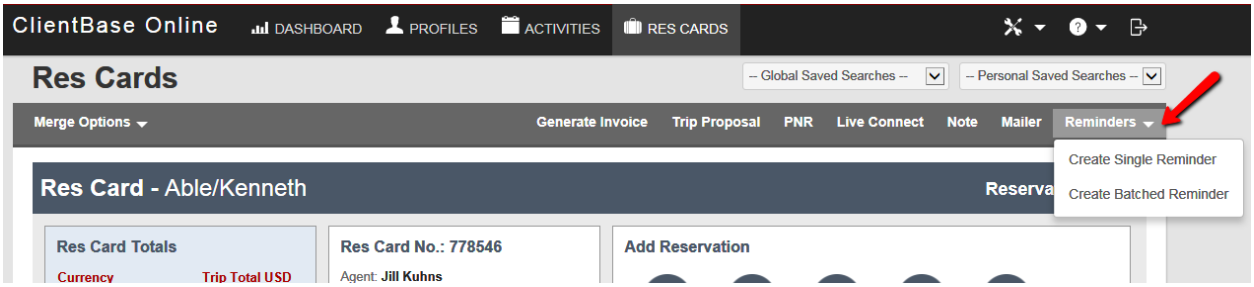

Batch Reminder List
Batch
Batch Name
Description
1
Cruise/Tour Batch
Default Reminders for Cruise/Tour Bookings
2
New Inquiry
Trip Inquiry Follow-up
3
Staff Meeting
Automated Reminders for Meetings
4
Cruise Reminders
Manage Cruise Booking Activities
Add
Modify
Delete
Close


Batch Reminder Setup
Batch Reminder Name
Cruise/Tour Batch
Description
Default Reminders for Cruise/Tour Bookings
Selected
Date of Remi
Start Time
Reminder Typ
Subject
Duration
Timeless
Login Name
Priority
Private
Set Alarm
Alarm Time
Completed
No Current Date 9:07 AM Phone Call Deposit Due 0 hours, 15 mir No <Current Us High No Yes 12/30/1899 No
Yes Trip Start Dat 9:07 AM Phone Call Final Payment Due 0 hours, 15 mir No <Current Us High No Yes 12/30/1899 No
Yes Current Date 9:07 AM Task Send Invoice Disclaime 0 hours, 15 mir No <Current Us High No Yes 12/30/1899 No
Yes Current Date 9:07 AM Task Travel Document Requ 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
No Current Date 9:07 AM Task Copies of Passports Re 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
No Trip Start Dat 9:07 AM Task Visa Reminder 0 hours, 15 mir No <Current Us High No Yes 12/30/1899 No
No Current Date 9:07 AM Task Check Flight Options 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
No Trip Start Dat 9:07 AM Task Seat Assignments Con 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Current Date 9:07 AM Task Insurance Follow Up 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Current Date 9:07 AM Task Disclaimer Signed 0 hours, 15 mir No <Current Us High No Yes 12/30/1899 No
Yes Trip Start Dat 9:07 AM Task Print or Email Travel42 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Trip Start Dat 9:07 AM Task Check for Documents 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
No Current Date 9:07 AM Task Online Check-in Remin 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Trip Start Dat 9:07 AM Task Documents Picked Up/ 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Trip Return D 9:07 AM Task Update Status and Re 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Trip Return D 9:07 AM Phone Call Welcome Home 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Trip Start Dat 9:07 AM Task Referral Program Intro 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
No Trip Start Dat 9:07 AM Task Send Gift 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Yes Trip Return D 9:07 AM Task Check for Commission 0 hours, 15 mir No <Current Us Medium No Yes 12/30/1899 No
Add
Modify
Delete
OK
Cancel

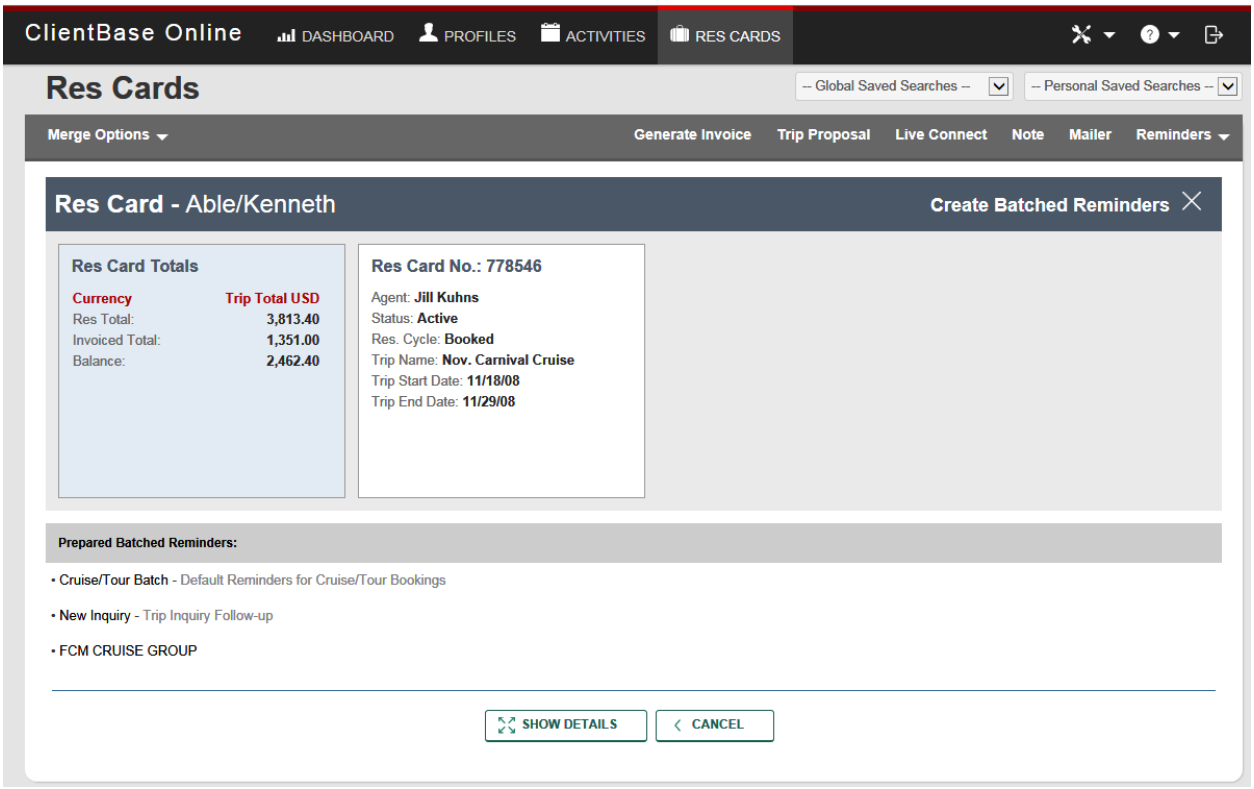

Batch Reminder Design
Create Reminder
Optional
Date
Default Date Using
Trip Start Date
plus/minus
-
Number of Days
90
Time
To Do (Timeless)
Start Time
9:07 AM
Duration
15 minutes
Login Name
<Current User>
Priority
Medium
Private
Reminder Type
Task
Subject
Seat Assignments Confirmed
Set Alarm
15 minutes
prior to scheduled time of Reminder
Completed
Remarks
Be sure that seat assignments are confirmed in your PNR. If booked with a Tour or Cruise operator request the airline record locator and verify preferred seats are selected via airline website.
Remember to offer any pay for seat options for airlines that don't offer free advanced seating. Offer the value of United Economy Plus or Delta Comfort seating when client is looking for value seating alternative to business/first class seating.
OK
Cancel

Using Batched Reminders

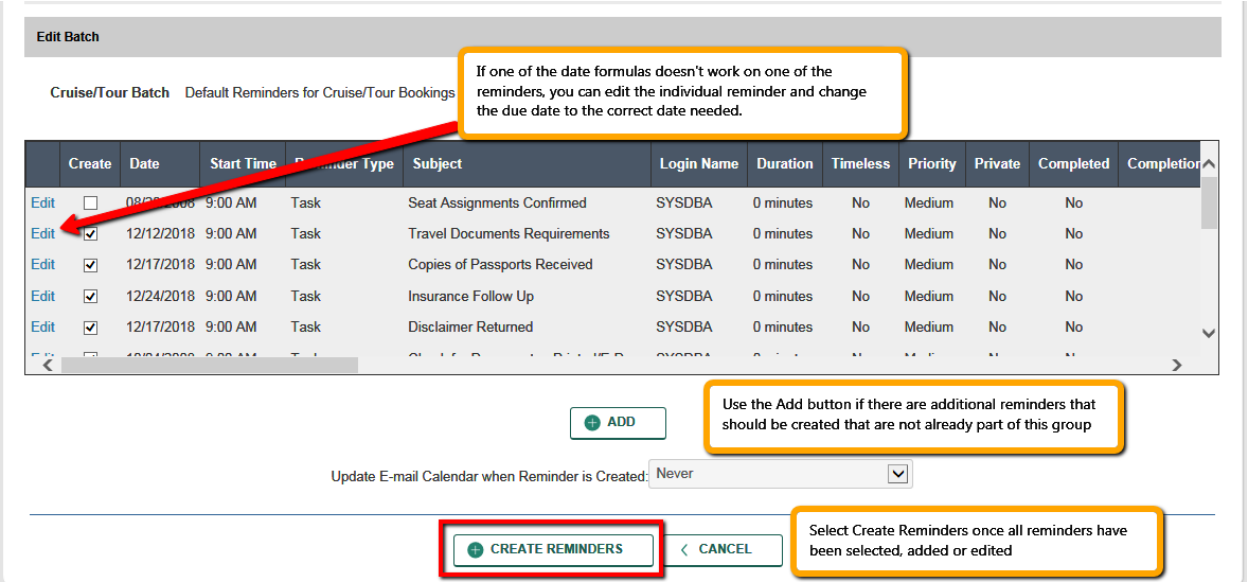
From inside the Res Card that you would like to add reminders, click on the **Reminders** drop-down in the tool bar at the top of the page and select **Create Batched Reminder.**

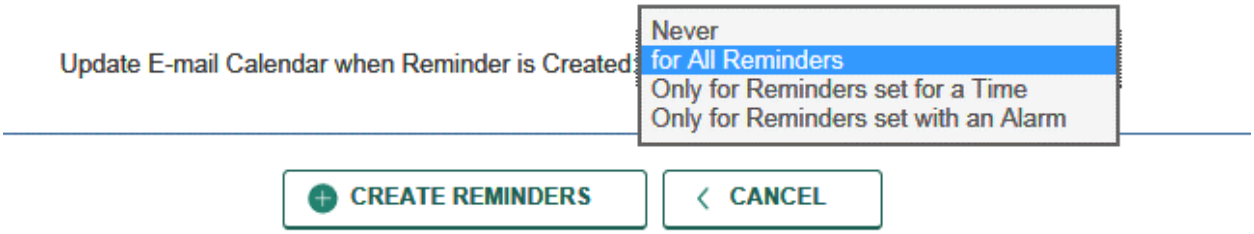


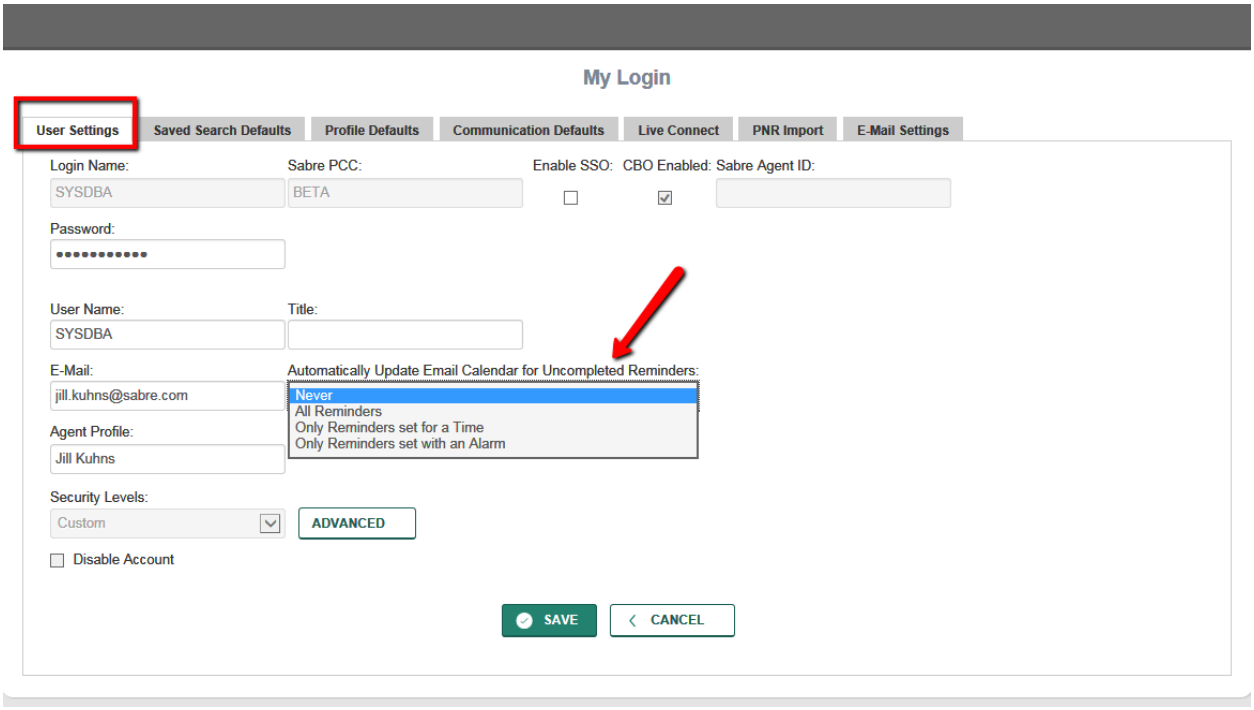
Select the Batched Reminder group you want to use.



Select all reminders you need for this trip, then click Create Reminders. If you want to sync your reminders between ClientBase Online and your e-mail calendar, you can set it from the drop-down options on this page or you can select your default setting under **User Settings** in **My Login.**





Tools > My Login > User Settings

*Please note, your e-mail settings do need to be set up for this feature to work.