



## Batched Reminders setup in ClientBase Online

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

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### Agency Settings

Batched Reminders

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- **Cruise/Tour Batch** - Default Reminders for Cruise/Tour Bookings
- **New Inquiry** - Trip Inquiry Follow-up
- **FCM CRUISE GROUP**

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[SHOW DETAILS](#) [ADD NEW BATCH](#)

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### Agency Settings

Batched Reminders

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**Edit Reminder Template**

Default Date using:    Days.

Start Time  Duration  To Do (Timeless)

Set Alarm  Duration

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Create Reminder

Reminder Type

Subject

Priority

Login Name

Private

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.

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**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:** *If 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.*

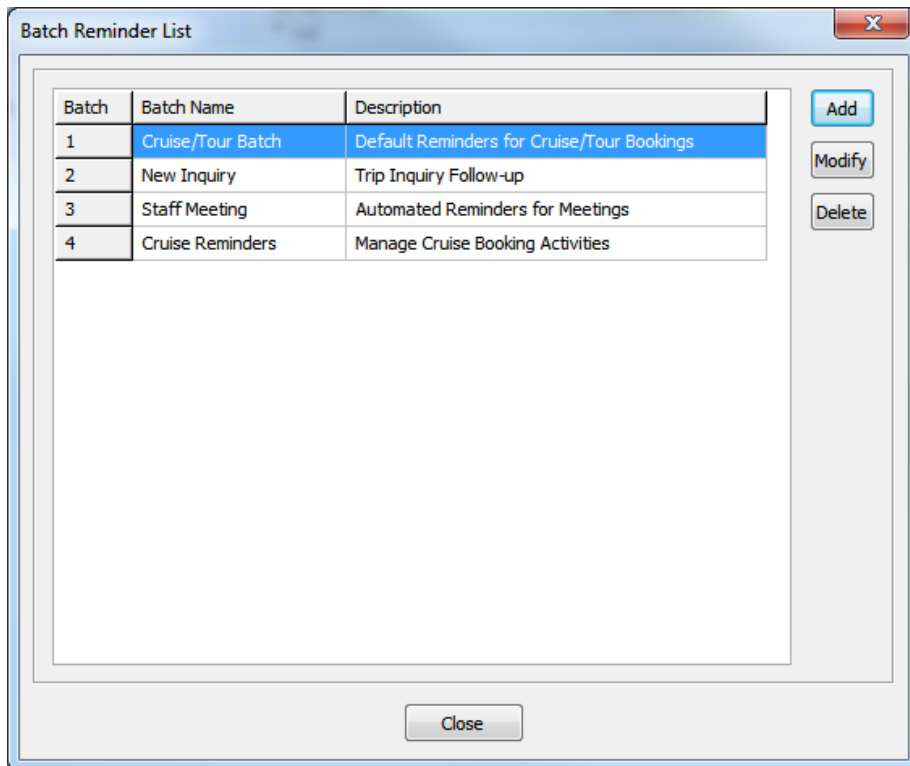
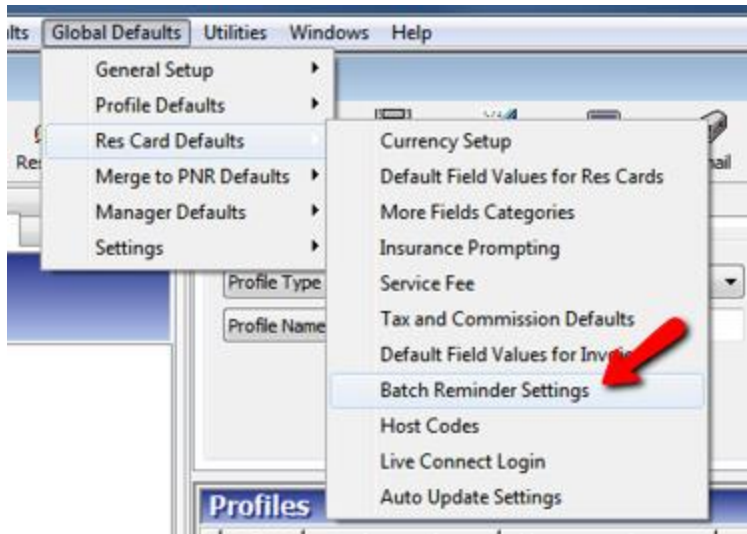
Continue to add as many default Reminders as you would like included within this Batch of Reminders

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



**Batch Reminder Setup**

Batch Reminder Name:  Description:

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 Dal	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 Disclai	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 Dal	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 Dal	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 Dal	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 Dal	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 Dal	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 Res	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 Dal	9:07 AM	Task	Referral Program Intro	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
No	Trip Start Dal	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

Buttons: Add, Modify, Delete, Up, Down, OK, Cancel

**Batch Reminder Design**

Create Reminder:

Date: Default Date Using:  plus/minus:  Number of Days:

Time:  To Do (Timeless) Start Time:  Duration:

Login Name:  Priority:   Private

Reminder Type:

Subject:

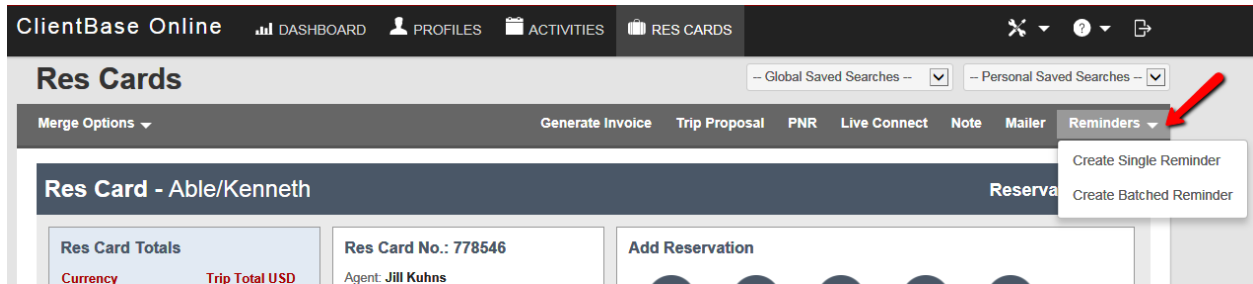
Set Alarm:  prior to scheduled time of Reminder  Completed

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.

Buttons: OK, Cancel

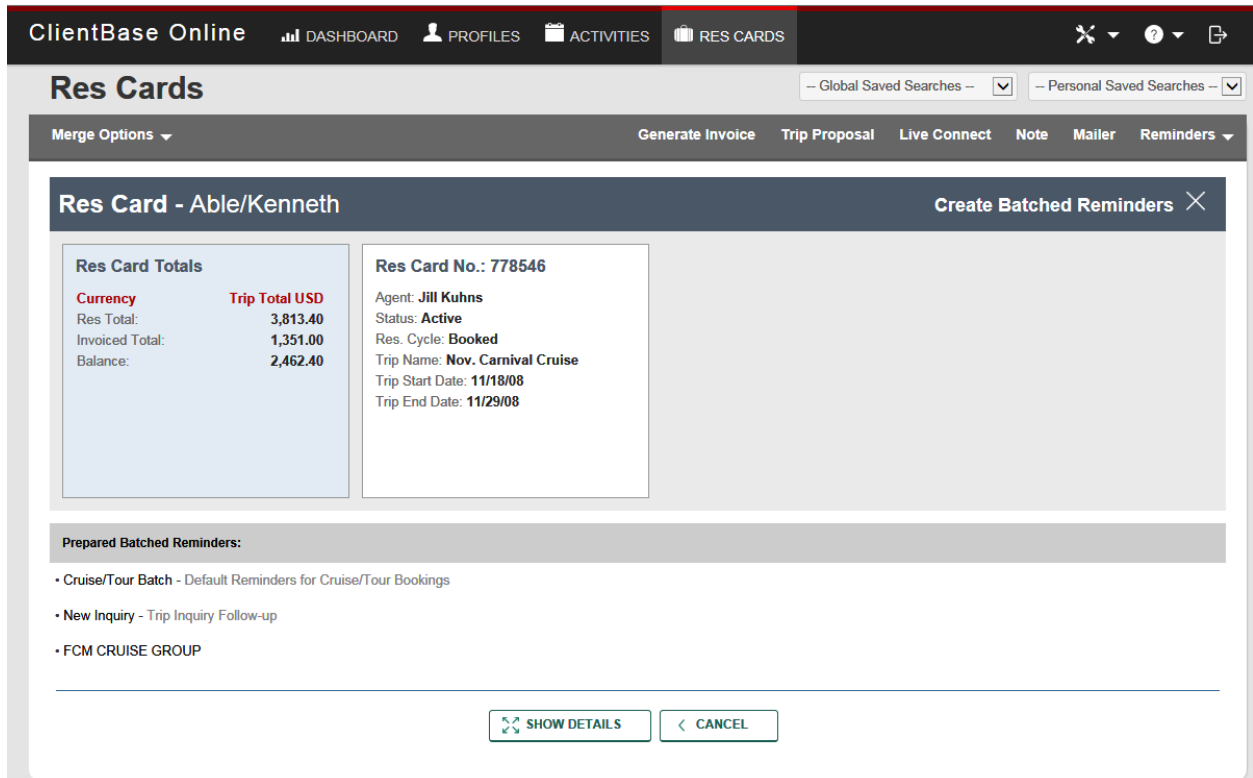
## Using Batched Reminders

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**.



The screenshot shows the ClientBase Online interface. At the top, there is a navigation bar with 'ClientBase Online' and several menu items: DASHBOARD, PROFILES, ACTIVITIES, and RES CARDS. Below this is a 'Res Cards' header with search filters for 'Global Saved Searches' and 'Personal Saved Searches'. A toolbar contains options like 'Merge Options', 'Generate Invoice', 'Trip Proposal', 'PNR', 'Live Connect', 'Note', 'Mailer', and 'Reminders'. The 'Reminders' dropdown is open, showing 'Create Single Reminder' and 'Create Batched Reminder'. A red arrow points to the 'Create Batched Reminder' option. Below the toolbar, the main content area shows 'Res Card - Able/Kenneth' with details like 'Res Card No.: 778546' and 'Agent: Jill Kuhns'.

Select the Batched Reminder group you want to use.



The screenshot shows the 'Create Batched Reminders' dialog box in ClientBase Online. The dialog title is 'Res Card - Able/Kenneth' and it includes a close button. The dialog is divided into two main sections. The left section, titled 'Res Card Totals', contains a table with the following data:

Currency	Trip Total USD
Res Total:	3,813.40
Invoiced Total:	1,351.00
Balance:	2,462.40

The right section, titled 'Res Card No.: 778546', contains the following details:

- Agent: Jill Kuhns
- Status: Active
- Res. Cycle: Booked
- Trip Name: Nov. Carnival Cruise
- Trip Start Date: 11/18/08
- Trip End Date: 11/29/08

Below these sections is a section titled 'Prepared Batched Reminders:' which lists three options:

- Cruise/Tour Batch - Default Reminders for Cruise/Tour Bookings
- New Inquiry - Trip Inquiry Follow-up
- FCM CRUISE GROUP

At the bottom of the dialog, there are two buttons: 'SHOW DETAILS' and 'CANCEL'.

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**.

**Edit Batch**

Cruise/Tour Batch Default Reminders for Cruise/Tour Bookings

If one of the date formulas doesn't work on one of the reminders, you can edit the individual reminder and change the due date to the correct date needed.

	Create	Date	Start Time	Reminder Type	Subject	Login Name	Duration	Timeless	Priority	Private	Completed	Completion
Edit	<input type="checkbox"/>	08/20/2008	9:00 AM	Task	Seat Assignments Confirmed	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/12/2018	9:00 AM	Task	Travel Documents Requirements	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/17/2018	9:00 AM	Task	Copies of Passports Received	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/24/2018	9:00 AM	Task	Insurance Follow Up	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/17/2018	9:00 AM	Task	Disclaimer Returned	SYSDBA	0 minutes	No	Medium	No	No	

+ ADD

Use the Add button if there are additional reminders that should be created that are not already part of this group

Update E-mail Calendar when Reminder is Created: Never

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+ CREATE REMINDERS

< CANCEL

Select Create Reminders once all reminders have been selected, added or edited

Update E-mail Calendar when Reminder is Created:
 

Never  
for All Reminders  
 Only for Reminders set for a Time  
 Only for Reminders set with an Alarm

+ CREATE REMINDERS

< CANCEL

Tools > My Login > User Settings

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

**My Login**

**User Settings** | Saved Search Defaults | Profile Defaults | Communication Defaults | Live Connect | PNR Import | E-Mail Settings

Login Name: SYSDBA Sabre PCC: BETA Enable SSO:  CBO Enabled:  Sabre Agent ID:

Password:

User Name: SYSDBA Title:

E-Mail: jill.kuhns@sabre.com

Agent Profile: Jill Kuhns

Security Levels: Custom

Disable Account

Automatically Update Email Calendar for Uncompleted Reminders:

- Never
- All Reminders
- Only Reminders set for a Time
- Only Reminders set with an Alarm