CLIENTBASE v. 4.0 DASHBOARD REPORTS RESOURCE GUIDE

(Dashboard and Pacing Dashboard reports)

General Dashboard	Description	Charts	Parameters

General Dashboard Analysis (Summary)
 	
[GeneralDashboardAnalysis.rpt](#)
Updated 1/11/17 kj
	A series of Bar Charts providing information about Leisure Clients and ResCard Sales. See description of Bar charts in column to the right.
	
	Includes several different averages for the current and prior calendar years. Also, includes # of open leads and # of ResCards without identified insurance.
	Sample
		Bar Chart – YTD New Clients
		Bar Chart – Total Client Profiles
		    Client Profiles with email
		    Client Profiles with Mkt Codes
		Bar Chart – YTD New ResCards
		Bar Chart – YTD Gross Sales from Inv
		Bar Chart – YTD Gross Sales by Travel
		  Categories
		Bar Chart – Projected Commissions
		  by month – using Return Date
		Information (Things to Know)
		 Averages – Calendar Year
		   Monthly New Clients this Year
		   Monthly New Clients last Year
		   Trip Sales – Current Year
		   Trip Sales – Last Year
		   Trip Revenue – Current Year
		   Trip Revenue – Prior Year
		   Current Open Leads
		   Active ResCards without
		     Insurance
			Agent - Option
			Branch – Option
			Dates – Not Used

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Sales and ResCard Dashboards	Description	Charts	Parameters

Sales Dashboard (Summary)
 	
SalesDashboard.rpt
Updated 1/11/17 kj
	Comprehensive set of charts which are a combination of all the Dashboards listed below in this section.
	
	All of the charts are for the period of time except a few which focus on total Active ResCards
	Sample
		Bar Chart – Total ResCards Created
		Bar Chart - % in each ResCycle
		Pie Chart - % of ResCards with Reservations
		Pie Chart - % of ResCards for top 5 Agents
		Bar Chart – Total Active ResCards Currently
		Pie Chart - % of total active ResCards with Reservations
		    Info - # of ResCards with reservations
		      # of open reminders
		      Average Days to Close
		      Oldest Active ResCard
		Reminders (Info) – Count by Subject
		    Completed (Total & Top 10)
		    Open (Total & Top 10)
		Bar Chart – Invoiced Sales by Category
		Bar Chart – Commission Amounts by month based on Return Date of trip.
			Agent - Optional
			Branch – Optional
			Dates - Required

Active ResCard Analysis (Included in Sales Dashboard) **ActiveResCardAnalysis.rpt** *Updated 1/11/17 kj*	Provides graphic analysis of Active ResCards. Count of Active ResCards Count of Reservations Counts of Open Reminders for those with Reservations and those without Reservations Average Days to Close ResCards (days between ResCard Create and first Invoice issued**)** Displays date of oldest Active ResCard **Sample**	Bar Chart - # of Active ResCards Pie Chart - % of Active ResCards with Reservations	**Agent - Option** **Branch – Option** **Dates - Not Used**

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Sales and ResCard Dashboards	Description	Charts	Parameters
ResCard Analysis (Included in Sales Dashboard) **ResCardAnalysis.rpt** *Updated 1/11/17 kj*	Graphic analysis of key ResCard level data **Sample**	Bar Chart – Total ResCards Created Bar Chart - % in top 10 ResCard Cycles	**Agent - Optional** **Branch – Optional** **Dates - Required**
ResCard Booking Analysis (Included in Sales Dashboard) **ResCardBookingAnalysis.rpt** *Updated 1/11/17 kj*	Graphic analysis of ResCards created for a date range and what % have Reservations. **Sample**	Bar Chart - # of new ResCards Pie Chart - % of ResCards with Reservations	**Agent - Optional** **Branch – Optional** **Dates - Required**
Sales and Commission Analysis (Included in Sales Dashboard) **SalesandCommissionAnalysis.rpt** *Updated 1/11/17 kj*	Graphic analysis of Invoiced Sales and Commissions for the date range specified. **Sample**	Bar Chart – Invoiced Sales by Category Bar Chart – Invoice Commissions (Revenue) by Category	**Agent - Optional** **Branch – Optional** **Dates - Required**

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Profile and Marketing Dashboards	Description	Charts	Parameters

Marketing Dashboard
 MarketingDashboard.rpt
 Updated 1/11/17 kj
	Comprehensive set of charts which are a combination of all the Dashboards listed below in this section.
	
	 Graphic analysis of various marketing information for all active leisure profiles.
	 Sample
		Bar Chart – Profile Analysis
		   New Client Profiles
		   Client Profiles Updated
		   Total Client Profiles
		 Bar Chart – Percentages – Profiles
		   Emails, Emails with Mktg Permit,
		   Mktg Codes, Complete Addresses,
		   Travel History, ResCards, Birthdays,
		   Passports, and Mailers within last
		   30 days.
		 Bar Chart – Top 10 Mktg Codes
		   (Percent of total Profiles)
		 Pie Chart – Mailer Activities Mailer
		   Percent by Mailer Type
		 Bar Chart – Client Profiles Sent Mailer
		   Count Sent, Opens, Clicks and
		   ResCards
			Agent - Optional
			 Branch – Optional
			 Dates - Required

Activity Mailer Analysis **(Included in Marketing Dashboard)** **ActivityMailerAnalysis.rpt** *Updated 1/11/17 kj*	Provides two graphic analysis of the Mailers sent out during the period selected. Mailers are grouped by mailer type. Mailers are also analyzed for profiles by total sends, total opens, total clicks and total ResCards created. **Sample**	Pie Chart – Mailer count by mailer type Bar Chart – Analysis of Profiles sent mailers – Sent, Opens, Clicks and ResCards	**Agent - Option** **Branch – Option** **Dates - Required**

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Profile and Marketing Dashboards	Description	Charts	Parameters

Profile Count (Included in Marketing Dashboard)
 ProfileCount.rpt
 Updated 1/11/17 kj
	Graphic analysis of profile information for a specified date range.
	 Sample
		Bar Chart -Profile Counts
		    New Client Profiles
		    Client Profiles Updated
		    Total Client Profiles
			Agent - Optional
			 Branch – Optional
			 Dates - Required

Profile Marketing Code Analysis (Included in Marketing Dashboard)
 ProfileMarketingCodeAnalysis.rpt
 Updated 1/11/17 kj
	Graphic analysis of Active Profiles and Marketing Codes related to these profiles
	 Sample
		Bar Chart – Profile Counts
		    Total Profiles
		    Profiles with Marketing Codes
		    Profiles without Mktg Codes
		 Bar Chart – Top Ten Marketing Codes in Profiles
			Agent - Optional
			 Branch – Optional
			 Dates – Not Used

Profile Quality Analysis (Included in Marketing Dashboard)
 ProfileQualityAnalysis.rpt
 Updated 1/11/17 kj
	Graphic analysis of quantity of various things attached to profiles
	 Sample
		Bar Chart – Percentages – Profiles with attached
		    Emails
		    Emails with Marketing Permissions
		    Marketing Codes
		    Complete Addresses
		    Travel History
		    ResCards
		    Birthdays
		    Passports
		    Mailers within last 30 days.
			Agent - Optional
			 Branch – Optional
			 Dates – Not Used

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Pacing Dashboard Reports for ClientBase v. 4.0

When properly used, ResCards in ClientBase hold all the data regarding when all "Bookings" (confirmed reservations) were made for leisure travel within and agency which will result in revenue to the agency at some future date. Pacing Dashboards are designed to give you a snapshot of how well your Bookings are doing as of today vs the same time last year for comparable travel periods.

The Pacing Dashboards use confirmed ResCard Reservation Create Dates and Trip Start Dates for the same ResCards. All the Pacing Dashboards compare the same Travel Category or Supplier (Vendor) data for trips starting during one calendar period with reservations created by this same date last year for trips starting in the prior calendar period. The Pacing Dashboards rely on having the correct VendorID in the Vendor Profile of the Supplier you see in the report. If that VendorID is in the Vendor Profile, all your data for that Supplier will be used in these Pacing Dashboards. Each Pacing Report lists below the Suppliers and the VendorID that must be in the Vendor Profile(s). If you have more than one Vendor Profile for a Supplier, be sure that the VendorID is in all of them so that you include all Booked sales/revenue for that Supplier.

There are two sets of Pacing Dashboards. One set compares this year's trip start dates against last year's trip start dates and uses reservations created as of today. These are compared with reservations created by the same date last year for trips starting in the prior year. The other set – referred to as "Next Year" - compare all confirmed reservations as of today for trips starting in the next calendar year against all confirmed reservations created on or before this same date last year for trips starting in this calendar year.

All pacing Dashboards can be run for the entire Agency (if Permitted) and by individual Agents for their book of business. The "All Travel" Pacing Dashboard can also be run for a Branch.

Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing All Travel (Supports Branch) **Pace104CTotalTravelDashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Travel (Cruise, Tours, Insurance, Fees & Other) Cruise Sales Tour Sales Insurance Sales Fees Other (Includes Transportation, Miscellaneous & Rail) (Does not include Air, Car or Hotel)

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Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing All Travel – Next Year **Pace104FutureTotalTravelDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Travel (Cruise, Tours, Insurance, Fees & Other) Cruise Sales Tour Sales Insurance Sales Fees Other (Includes Transportation, Miscellaneous & Rail) (Does not include Air, Car or Hotel)
Pacing All Cruises **Pace134CCruiseAllDashBoard.rpt** *New* *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Contemporary Cruise Lines Total Premium Cruises Total Deluxe Cruises Total River Cruises Total Small Ship Cruise (See list of Cruise Lines for each category – below)
Pacing All Cruises – Next year **Pace134FCruiseAllDashBoard.rpt** *New* *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Contemporary Cruise Lines Total Premium Cruises Total Deluxe Cruises Total River Cruises Total Small Ship Cruise (See list of Cruise Lines for each category – below)
Pacing Cruises Contemporary *Pace144CCruiseContemporaryDashBoard.rpt* *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Contemporary Cruise Lines (Carnival, Costa, MSC, NCL, & RCCL) Carnival Cruise Lines 160 (VendorID) Costa Cruise Lines 4012 MSC 4001 NCL 586 Royal Caribbean 36

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Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Cruises Contemporary – Next Year **Pace144FutureContemporaryDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Contemporary Cruise Lines (Carnival, Costa, MSC, NCL, & RCCL) Carnival Cruise Lines 160 (VendorID) Costa Cruise Lines 4012 MSC 4001 NCL 586 Royal Caribbean 36
Pacing Cruises Premium **Pace154CCruisePremiumDashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Premium Cruise Lines (Celebrity, Disney, Holland America and Princess) Celebrity Cruises 26 (VendorID) Disney Cruises 29 Holland America 30 Princess Cruises 33
Pacing Cruises Premium – Next Year **Pace154FuturePremiumDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Premium Cruise Lines (Celebrity, Disney, Holland America and Princess) Celebrity Cruises 26 (VendorID) Disney Cruises 29 Holland America 30 Princess Cruises 33
Pacing Cruises Deluxe **Pace164CCruiseDeluxeDashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Deluxe Cruises (Azamura, Crystal, Cunard, Oceania, Regent, Seabourn & Silversea) Azamara Club Cruises 4018 (VendorID) Crystal Cruises 27 Cunard Cruise Line 28 Oceania Cruises 1021 Regent Seven Seas 34 Seabourn 145 Silversea 37

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Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Cruises Deluxe – Next Year **Pace164FutureCruiseDeluxeDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Deluxe Cruises (Azamura, Crystal, Cunard, Oceania, Regent, Seabourn & Silversea) Azamura Club Cruises 4018 (VendorID) Crystal Cruises 27 Cunard Cruise Line 28 Oceania Cruises 1021 Regent Seven Seas 34 Seabourn 145 Silversea 37
Pacing Cruises River **Pace174CCruiseRiverDashboard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total River Cruises (AMA, Avalon, Uniworld, Victoria or Viking) AMA Cruise Line 4020 (VendorID) Avalon Waterways 4015 Uniworld Boutique 943 Victoria Cruise Line 4039 Viking River Cruises 201
Pacing Cruises River – Next Year **Pace174FutureCruiseRiverDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total River Cruises (AMA, Avalon, Uniworld, Victoria or Viking) AMA Cruise Line 4020 (VendorID) Avalon Waterways 4015 Uniworld Boutique 943 Victoria Cruise Line 4039 Viking River Cruises 201

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Pacing Dashboard Reports		
Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Cruises Small Ships **Pace184CCruiseSmallDashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Small Ships (American Cruise Lines, American Queen, American Safari, Blount Small Ships, Clipper, Compagnie, Encore, Hurtigruten, Lindblad, Majestic Am, Paul Gauguin, SeaDream, Star Clipper, Variety, Voyages of Discovery, Voyages to Antiquity, and Windstar) American Cruise Lines 4023 (VendorID) American Queen Steamboat 4041 American Safari 4016 Blount Small Ships 4033 Clipper Cruises 375 Compagnie du Pondant 4028 Encore Cruises 4026 Hurtigruten 5831 Lindblad Expeditions 38 Majestic America 4017 Paul Gauguin 4025 SeaDream Yacht Club 792 Star Clippers 4006 Variety Cruises 4031 Voyages of Discovery 5245 Voyages to Antiquity 4027 Windstar Cruises 40

Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Cruises Small Ships – Next Year **Pace184FutureCruiseSmallDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Cruises Total Small Ships (American Cruise Lines, American Queen, American Safari, Blount Small Ships, Clipper, Compagnie, Encore, Hurtigruten, Lindblad, Majestic Am, Paul Gauguin, SeaDream, Star Clipper, Variety, Voyages of Discovery, Voyages to Antiquity, and Windstar) American Cruise Lines 4023 (VendorID) American Queen Steamboat 4041 American Safari 4016 Blount Small Ships 4033 Clipper Cruises 375 Compagnie du Pondant 4028 Encore Cruises 4026 Hurtigruten 5831 Lindblad Expeditions 38 Majestic America 4017 Paul Gauguin 4025 SeaDream Yacht Club 792 Star Clippers 4006 Variety Cruises 4031 Voyages of Discovery 5245 Voyages to Antiquity 4027 Windstar Cruises 40

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Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Tours Packaged **Pace214CToursPackagedDashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Tours Total Packaged Tours(Apple, Classic, Delta Vacations, Disney, Funjet, GoGo, Pleasant, Travel Bound, Travel Impressions, United Vacations, US Airways) Apple Vacations 45 (VendorID) Classic Vacations 5036 Delta Vacations 5048 Disney 78 Funjet 5066 GoGo 5074 Pleasant Holidays 69 Travel Bound 77 Travel Impressions 5157 United Vacations 5160 US Airways 5404
Pacing Tours Packaged – Next Year **Pace214FutureToursPackagedDashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Tours Total Packaged Tours(Apple, Classic, Delta Vacations, Disney, Funjet, GoGo, Pleasant, Travel Bound, Travel Impressions, United Vacations, US Airways) Apple Vacations 45 (VendorID) Classic Vacations 5036 Delta Vacations 5048 Disney 78 Funjet 5066 GoGo 5074 Pleasant Holidays 69 Travel Bound 77 Travel Impressions 5157 United Vacations 5160 US Airways 5404

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Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Tours Escorted Group 1 **Pace244CToursEscortedGroup1DashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Tours Escorted Tours (All Escorted Suppliers in Group 1 and Group 2) A & K 43 (VendorID) Brendan 48 G Adventures 5069 Globus 59 Insight 61 Monograms 5241 Tauck 74 Trafalgar 5154
Pacing Tours Escorted Group 1 – Next Year **Pace244FutureToursEscortedGroup1DashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Tours Escorted Tours (All Escorted Suppliers in Group 1 and Group 2) A & K 43 (VendorID) Brendan 48 G Adventures 5069 Globus 59 Insight 61 Monograms 5241 Tauck 74 Trafalgar 5154
Pacing Tours Escorted Group 2 **Pace254CToursEscortedGroup2DashBoard.rpt** *Updated 1/11/17 kj*	Current Calendar Year booked on or before Today vs Past Calendar Year booked on or before 1 year ago Today **Sample**	Total Tours Escorted Tours (All Escorted Suppliers in Group 1 and Group 2) Collette 5037 (VendorID) Contiki 5040 Cosmos 5042 General 5071 Mayflower 5102 Pacific Delight 5113 Perillo 5201 Travcoa 76

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Pacing Dashboard Reports

Name of Dashboard	Travel Periods Involved	Items Compared
Pacing Tours Escorted Group 2 – Next Year **Pace254FutureToursEscortedGroup2DashBoard.rpt** *Updated 1/11/17 kj*	Next Calendar Year booked on or before Today vs this Calendar Year booked on or before 1 year ago Today **Sample**	Total Tours Escorted Tours (All Escorted Suppliers in Group 1 and Group 2) Collette 5037 (VendorID) Contiki 5040 Cosmos 5042 General 5071 Mayflower 5102 Pacific Delight 5113 Perillo 5201 Travcoa 76

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