

CLIENTBASE CLIENT ANALYSIS				
ClientBase Client Analysis	Description	Excel	ClientBase Fields	Parameters
Client Trips By Year 3.09 v: ClientTripsByYear.rpt Updated Version 06/06/2016 (This one new version replaces two previous versions and has more optional parameters) Eliminated as redundant ClientTripsByYearExcel.rpt 4.00 v: ClientsTripsByYear_4_0.rpt Updated Version 06/19/2019	Provides either a list or an excel formatted list of clients with total ResCards and base amounts and commissions for up to 5 years. If you are opting to export to excel, you can select either base amounts (Sales or commissions (Revenues). Can also run the same report for one supplier as part of the parameters. You can select the number of Clients you wish to report out, if using DataLink. This report also can select one Agent or one Branch and multiple Travel Categories	Yes	Profile: Profile # (excel Only), Name ResCard: Number of ResCards, Total Base Amount and Commission for each of up to 5 years. Sample	Date Range for either ResCard Create Date, Trip Start Date, or Reservation Date; Select All or one Supplier, Agent or Branch. Number of Clients to List. Select one or multiple Travel Categories
Client Trips By Dollar Value 3.09 v: ClientTripsByDollarValue.rpt Updated Version 07/31/2016 Renamed from Dollar Value of Trips.rpt 4.00 v: ClientTripsByDollarValue_4_0.rpt Updated Version 07/31/2016	Calculates and prints out the number of trips taken within each dollar value: (0 - \$1,500; \$1,501 - \$3,000; \$3,001 - \$5,000; \$5,001 - \$10,000; over \$10,000) for the number of selected top Clients. Can also run the same report with only one supplier as part of the parameters and multiple Travel Categories	No	Profile: Name ResCard: Number of ResCards, Total Base Amount within the correct value groups. Sample	Date Range for either ResCard Create Date, Trip Start Date. All or one Supplier. Number of Clients to List. Select one or multiple Travel Categories

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Client Trips – Time Between Inquiry & Travel 3.09v: ClientTripsTimeBetweenInquiryandTravel.rpt Updated Version 06/15/2016 Renamed from Time_Between_Inquiry_and_Travel-Client.rpt 4.00v: ClientTripsTimeBetweenInquiryandTravel 4 0.rpt Updated Version 07/15/2016	Calculates the difference between ResCard Create Date and Travel Start Date and prints out the number of trips taken within each month range: (0–3 months.; 4-6; 7-9; 10-12; 1315; 16-18; over 18 months) for the number of selected top Clients. Can also run the same report for one supplier and multiple Travel Categories.	No	Profile: Name ResCard: Number of ResCards, Total Base Amount within the correct value groups Sample	Date Range for either ResCard Create Date, Trip Start Date. All or one Supplier. Number of Clients to List. Select one or multiple Travel Categories

Client Trips by Regions – Variable # of Clients ClientTripsbyRegionVariable.rpt <i>New!</i> <i>(Renamed from TripsbyRegionAll.rpt and replaces also TripsbyRegionsClients-Top50.rpt)</i> Updated Version 6/15/2016	Prints out the Client Base amounts by Region. If no reason assigned, it will identify the sales in a separate “No Region Assigned” column. This report will print all your Clients.	No	Profile: Name ResCard: Number of ResCards, Total Base Amount within the correct Region. Sample	Date Range for either ResCard Create Date, Trip Start Date, or Reservation Date; All or one Supplier. Number of Clients to List.
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Client Trips by Regions - Variable # of Clients 3.9 v: ClientTripsbyRegionVariable.rpt Updated Version 2/1/2016 4.0 v: ClientTripsbyRegionVariable 4 0.rpt Updated Version 7/14/2016	Prints out the Client Base amounts by Region. If no reason assigned, it will identify the sales in a separate "No Region Assigned" column. This report prints as many Clients as you wish to select.	No	Profile: Name ResCard: Number of ResCards, Total Base Amount within the correct Region. Sample	Date Range for either ResCard Create Date, Trip Start Date, or Reservation Date; All or one Supplier. Number of Clients to List. Select one or multiple Travel Categories
Client Trips by Duration 3.09 v: Trip_Duration-clients.rpt Updated Version 1/20/2016 4.00 v: Trip_Duration-clients 4 0.rpt Updated Version 7/14/2016	Calculates various # of days for trips (1-4, 5-9, 10–14, 15–21, Over 21) Ranks clients by total Sales. Also allows running for all or one Supplier.		Top Clients; Sales by Duration Sample	Date Range for either ResCard Create Date; Trip Start Date; or Reservation Date; Also can Select Suppliers – All or one
Client Repeat Business Percent 3.09 v: ClientRepeatBusinessPercent.rpt Updated Version 1/3/2016 Renamed from 1501RepeatBusinessPercent100.rpt 4.00 v: ClientRepeatBusinessPercentt 4 0.rpt Updated Version 7/15/2016	Using two different date ranges for either ResCard Create Dates or Reservation Dates, prints out all profiles (in detail option) having ResCards in the both date ranges.	No	Profile: Name and Profile No. ResCard: Count of Number of either ResCards or Reservations in the two date ranges Sample	Two Date Ranges for either ResCard Create Dates or Trip Start Dates. Select which Date Range. Select one or multiple Travel Categories

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Client Revenue Summary Report ClientRevenueSummary.rpt Formerly 1502ClientRevenueSummary100.rpt Updated Version 1/5/2016	Summary of Total Revenue and # of ResCards by Client for Period of the Report. Can sort Alphabetically or by Total Revenue	No	Client Name, # ResCards and Total Revenues. Sample	Trip Start Date Range Type of Profile Branch(s) All Clients or Interface ID for one Sort by Client Name or \$\$
Client Passenger Profile Information PassengerProfileInfo101_308.rpt Formerly 1503PassengerProfileInfo101_308.rpt Updated Version 1/13/2016	Complete Client Profile Sheet including all information about the client and the travelers with the profile including communications, dates and other travel information.	No	All available Profile information, communications, traveler, card and dates Sample	Enter either a Profile name or and Interface IDs

Sales and Revenue by Customer 3.09 v: RevenueReportbyCustomersProfileCreateDate.rpt Updated Version 1/26/2016 4.00 v: RevenueReportbyCustomersProfileCreateDate 4 0.rpt Updated Version 7/15/2016	Client Sales and Revenue Analysis using Profile Selected Based on Their Create Date. Two Reports generated. - Summary report of Sales and Revenue for each selected Client on a Quarterly basis using Trip Start Date. - Detail report of all Sales & Revenue	No	Client; Sales; Revenue; By Quarter Traveled Client; Client Profile Create Date; ResCard Create Date; ResCard #; Region; Travel Category; Trip Start Date; Trip End Date; Supplier; Confirmation; ResCard Cycle; Net Fare; Tax; Total Fare (Sales); Commission Sample	Date Ranges for Client Profile Create Date; One of three ResCard Date Options - ResCard Create Date; Trip Start Date; Reservation Date; Option of Any or All Travel Categories
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