ClientBase Sabre

ClientBase Windows Manual

July, 2016

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Chapter 1: Introduction

This introduction provides a general overview of ClientBase, how it fits into agency operations, what it is, what it can do for your agency and front-line agents, and how to get started using the program.

How Does *ClientBase* Fit In?

Look around your desk. What do you see? Pictures of family, a phone, a calendar from one of the cruise lines, facial tissue. But wait! What's that behind all those Post-it notes? It's a computer! In most cases, it was put there as a terminal for a Global Distribution System (GDS), i.e. SABRE, Apollo/Galileo, Amadeus or Worldspan. If you are like many agents, you use it to book travel for clients and to find information on airfares, seats, hotel rooms, car rentals, etc. You may even use it to handle e-mail and browse the web, but not much more.

My Computer Can Do More?

That brings us to the point we want to make. The computer is a powerful tool that may not be being used to its full potential. That's where software comes in. Software programs are the different "hats" that your computer can wear to help you do things.

ClientBase turns your computer into a marketing machine. Other software programs allow you to design illustrations, navigate the internet, manage your accounting information, write books or even print information on worldwide destinations. The list of things that software programs can do continues to grow and grow. Many of them can be running along with your GDS simultaneously, and with a simple click of the mouse on your task bar, you can move among them. All of this can be a great benefit to you at work, but it starts with you being open to a new way of working and to new tools that may help you do your job better -- even make your job easier.

What is *ClientBase?*

ClientBase is a tool for selling travel. It's an easy-to-use marketing database system developed specifically for travel agents. The program gives you flexibility in maintaining the marketing and travel demographic components of your clientele. Not just another software program, *ClientBase* represents an evolving solution to your customer relationship management (CRM) needs.

It's About Building and Maintaining Relationships

ClientBase organizes all the client information you decide is relevant for marketing, and gives you an easy way to access that information quickly. From the outside, *ClientBase* is a powerful tool designed to help you sell travel to people. Inside, you will find key features that assist you in building and maintaining lasting relationships with your clients.

You know how important it is to maintain a good relationship with your clients, especially if you are a travel professional specializing in leisure travel. You succeed by creating a bond, building trust and by matching the right travel products and services with your customers. However, keeping track of the increasing quantity of leisure travelers and complexity of travel packages is a difficult task. You need an easy-to-use tool that allows you to access the pertinent information you have stored for every client.

ClientBase is that tool. Install it and see for yourself!

What Can *ClientBase* Do?

ClientBase helps your agency build, organize and utilize information about your clients so you can sell more travel. It helps your agents qualify customers, work more efficiently and organize schedules. Below are just a few of the things that can be done with *ClientBase*:

- Agents share valuable client profile data because *ClientBase* is running on your agency network.
- Shares the *Trams Back Office* database and provides Agents live access to Travel & Payment History.
- Controls Agent Access with Built-In Security.
- Streamlines marketing with Point-and-Click Codes.
- Generates targeted client lists with flexible queries (Combines History and Preferences in one Query to find a target market.

- Runs Labels for quick, effective marketing.
- Prints Custom Letters or sends E-mails quickly and easily with Document Templates.
- Saves time and duplication with Merge to PNR.
- Communicates quickly with targeted clients using e-mail blast.
- Organizes agent activities with Activity Manager and Day - At A Glance.
- Generates invoices that drop directly in *Trams Back Office* (without any data entry in CRS).
- Allows the creation of inventory items to block space to integrate into the reservation area of Res Cards.

How Do I Learn the Benefits of this Valuable Tool?

This documentation has been designed for both the front-line agents and the agency management and marketing teams. It is accessible electronically via our website (http://www.sabretravelnetwork.com/trams), and within the *ClientBase* Help files.

On the *Trams* website at http://www.sabretravelnetwork.com/trams under the **Training|Getting Started** link, access the *ClientBase* QuickStart Training Program, an all-inclusive training package for owners/managers to quickly implement *ClientBase* in your agency and maximize its many CRM benefits. In addition, by e-mailing **Trams.Training@*sabre*.com**, your agency can set up *Train-the-Trainer* sessions where you can get guidance on setting up your agents and creating a training plan.

Trams also offers a series of on-line live training sessions on our WebEx link at **www.sabretravelnetwork.com/*trams*|Training|*ClientBase* WebEx Training**. These courses break the program up into digestible bites. (Be sure to click on the class order for cohesiveness.) Sign up too for one of our daily on-line Question and Answer Forums with *ClientBase* support personnel and other *ClientBase* users. Recorded WebEx training on *ClientBase* features and usage are also available on this same webpage.

In addition to our On-Line Trainings and Question and Answer Forums, we offer unlimited technical support (depending on your license) by calling our team of highly trained support personnel at 310-641-8726, e-mailing them at **Trams.CBSupport@*sabre*.com** or faxing them your question to 310-641-8571.

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* because the sooner you begin reaping the benefits of *ClientBase*, the sooner you'll be SELLING MORE TRAVEL. We're sure of it.

Chapter 2: Installation Guide

Successful system usage depends on proper hardware, setup and installation. This section walks you through the steps necessary to successfully install ClientBase on your agency's local area network. Please be sure to read this chapter carefully, verify your system meets the hardware requirements, and follow the steps exactly.

Trams Back Office Users

ClientBase shares a database with the *Trams Back Office* system and therefore also uses Interbase as the underlying engine. A new version of Interbase has recently been released, Interbase XE. Depending on when you installed *Trams Back Office*, you may still be running an older version of Interbase, such as 8.0 or earlier. This new version of *ClientBase* has been optimized for system performance to run on Interbase XE. To verify your version of Interbase, log into *Trams Back Office* and go to *Help*|*Table Version* and check the field *IB Server Version.* To upgrade to Interbase XE when you are running an earlier version with TBO, contact our support desk and directions below to upgrade.

Canadian Users

The Canadian version of *ClientBase* is available in French, in addition to English. Upon installing version 3.03 or above update on each workstation, a second desktop shortcut is created automatically called *CBPlus French*. Now French speaking agents can either run *ClientBase* in English or in French. Although the majority of the program has been translated to French, the invoice is the only report in *ClientBase* that prints in anything other than English. Please note that both the English and the French version of *ClientBase* include the Invoice Format option of printing an invoice in any of the following languages: English, French or Spanish.

The CBPlusfre.exe is installed in the same directory as cbplus.exe. On the desktop where the CBPlus shortcut is installed and in the *Trams* program group (folder under start/programs/etc) where the CBPlus shortcut is installed, a CBPlus French shortcut also appears.

Hardware Requirements

Your customers and the information you collect from them are the heart of your business. *ClientBase* is designed to help your agency quickly access and manage this information by making it available to everyone within your business. With this in mind, most agencies install the *ClientBase* program on multiple workstations, including all agent workstations.

Although the program is installed in multiple locations, the objective is to centralize this customer information so that all workstations access one common database. In this scenario, the computer housing the database (*trams*.ib) is considered the "server" and the computers set up to run *ClientBase* and access that database are considered the "clients". Regardless of the number of clients running *ClientBase*, the hardware recommendations for the *workstations* remain constant. Unlike the workstations, server's hardware recommendations vary, depending on the number of clients (workstations) set up to work within the database simultaneously.

Click here for the current requirements.

Terminology to Prepare You for Installation

What is a Database?

All of the Profile, Activity, and Res Card details captured within your *ClientBase* program get stored within one file, which resides on your *ClientBase* server. This file is commonly referred to as your database and, because it is an InterBase database, always has a file extension of .ib (earlier versions had an extension of .gdb). InterBase is the engine that the *ClientBase* program is built around.

Although it is not necessarily recommended, if for some reason you wanted to break your information into multiple databases, you would have multiple files on your server, one for each database. Each of these files would have a common file extension (ib or gdb if you already have TBO), but different file names.

What is an ib?

IB is used as the file extension for an Interbase database. Upon running the *ClientBase* program, a login screen appears allowing you to identify the database that you want to load within the *ClientBase* program. The file that represents your database will have an .ib extension unless you are already running Trams Back Office, in which case you retain the .gdb extension you have been using with Trams Back Office.

If you are a *Trams Back Office* user the database has already been created and is probably called *Trams*.ib or for older versions .gdb and resides in the *Trams**Trams*win directory. This database file can be used within the *ClientBase* program eliminating the inefficiencies of maintaining two separate databases in your office.

If you are not a *Trams Back Office* user, then a blank *Trams*.ib file is created upon installing *ClientBase* onto your server.

What is an Alias?

An alias is a path pointing to your database. The alias stores a name for your database and a path to find that database on the server. Each time you open the *ClientBase* program or *Trams Back Office*, you are prompted for the alias you want to use. Select the alias from the drop-down menu of database names. The executable program looks at the associated path and follows that path to connect to your data. An Alias with the name of *Trams* is created by default during installation.

What is Interbase

Interbase is best described as the database operating system. It is the foundation upon which *ClientBase* and *Trams Back Office* run. This foundation is responsible for the structure of the database, storing the data, any maintenance and utilities applied to the database, connecting the application program to the database and file locking on the network to save the integrity of the database.

Set Up the *ClientBase* Server

The Role of the *ClientBase* Server

ClientBase is a true client/server application. This means the workstations are “clients” and rather than doing their own processing of information, they send a query to the “server,” the server processes the query, and sends the results back to the workstation. Because the server is only sending results instead of the full database across the network, applications designed for Client/Server are faster and more powerful. The server is the computer housing the database, and the clients are the workstations set up to run the *ClientBase* application program.

Although the workstations need certain resources to run the *ClientBase* executable and display the screens of information when queries are performed, the server is doing most of the work. The more workstations performing simultaneous queries, the harder the server must work. The harder the server must work, the more resources the server needs to perform the work in a timely fashion.

Therefore, there is a direct relationship between the number of workstations accessing *ClientBase* simultaneously and the type of hardware an agency needs for their *ClientBase* server. In the past, it was common for one of the agent workstations to function as the *ClientBase* server. This type of networking is still available, but is limited to smaller networks of five or fewer workstations. Please refer to the hardware recommendations located at the beginning of this chapter to determine what kind of server is necessary for your agency configuration.

Selecting the Right Server for *ClientBase*

When deciding which computer should function as your *ClientBase* server, the following items should be considered:

- The Server PC must meet the hardware recommendations (at least the minimum), based upon the number of users accessing the database.
- The Server PC must be accessible by any workstation set up to run *ClientBase* through the agency’s LAN (Local Area Network.

The Server PC houses the database (ib or gdb if running TBO for many years), which is shared with the *Trams Back Office* program. This means if your agency uses *Trams Back Office* as your accounting system, both programs (*Trams Back Office* and *ClientBase*) access the same database. Therefore, the server PC, which houses this common database, must be accessible via the network by any workstations setup to run either *Trams Back Office* or *ClientBase*.

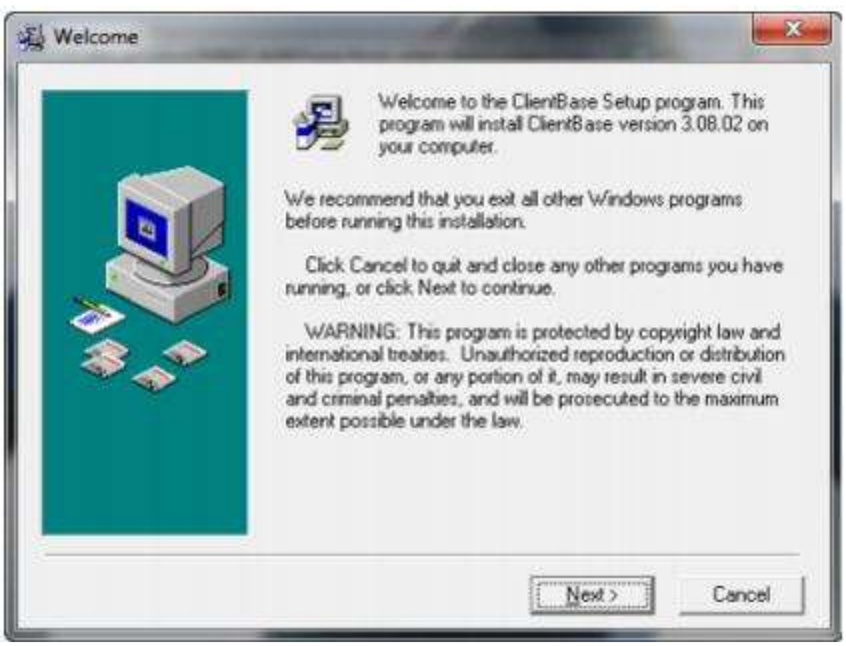
Install ClientBase Windows on Server - Agency Does Not Use Trams Back Office

ClientBase Installation with InterBase XE3

Reminder before installing, only install this file on a server and the agency DOES NOT use *Trams Back Office*. A *Trams* Implementation rep will be calling (Trams.Implementation@sabre.com) to assist with this process.

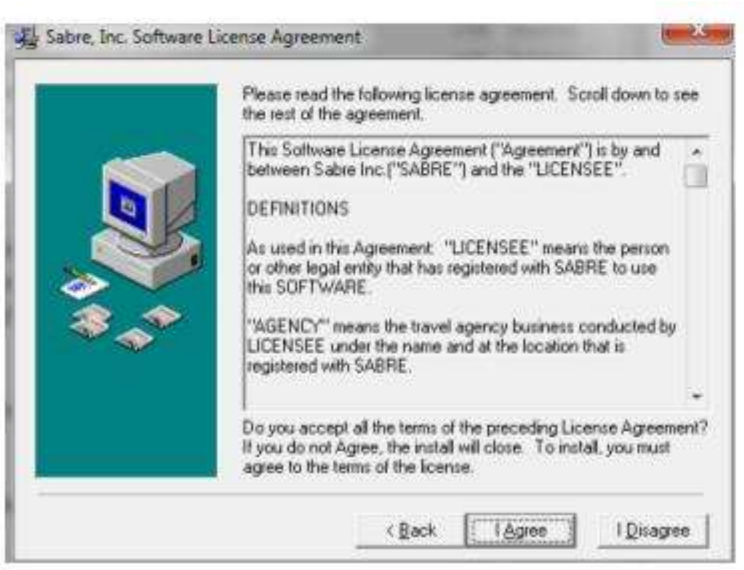
Step 1: Download the setup30802_ibXE3.exe into a folder on the server. Download the Program File located here: http://static.trams.com/tramslibrary/Releaseandupdatefiles/fullsetup.html. There is one file for all countries/regions.

Step 2: Run the setup.exe from the file you downloaded on your server by double-clicking the icon. An installation wizard loads.



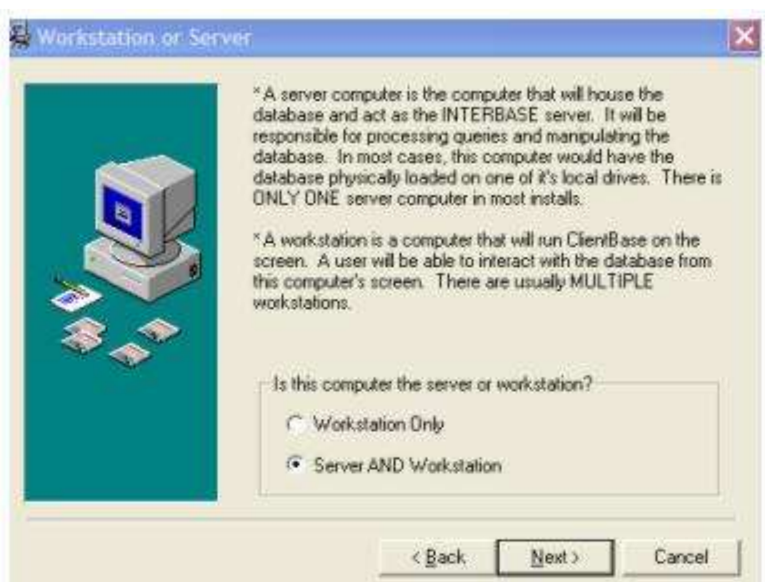
Step 3: Select *Next* at the Welcome Screen.

Step 4: Select *Agree* at the Software License Agreement Screen. In order to install and run any *Trams* Products and Services software, you must agree to the terms of our Software License Agreement. For your convenience this agreement is displayed within the installation wizard so that it can be reviewed and agreed to before installing our software. If you have any questions on the terms of this agreement please contact **[Trams.Billing@](mailto:Trams.Billing@sabre.com)*sabre*.com** or your area sales representative.



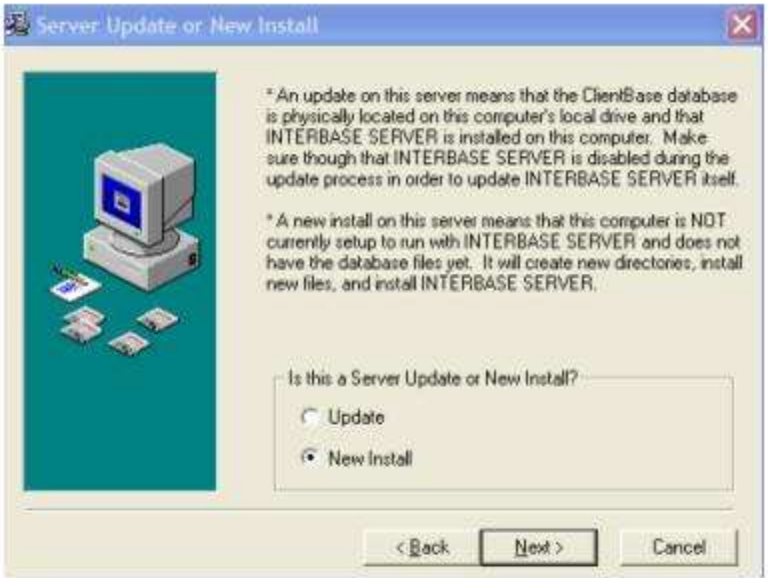
Step 5: The next few screens prompt you with questions to help guide you through the proper installation for your agency and server. Click *Next* to continue, or *Back* to go back a screen. The wizard allows you to move forward and backward through each prompt, ensuring proper answers before beginning the installation process.

Step 6: Select “Server AND Workstation” as installation type. You are prompted for the type of installation. Click the “Server AND Workstation” option and then click *Next*. This option sets this computer up as the server, meaning it stores the database and processes your data.

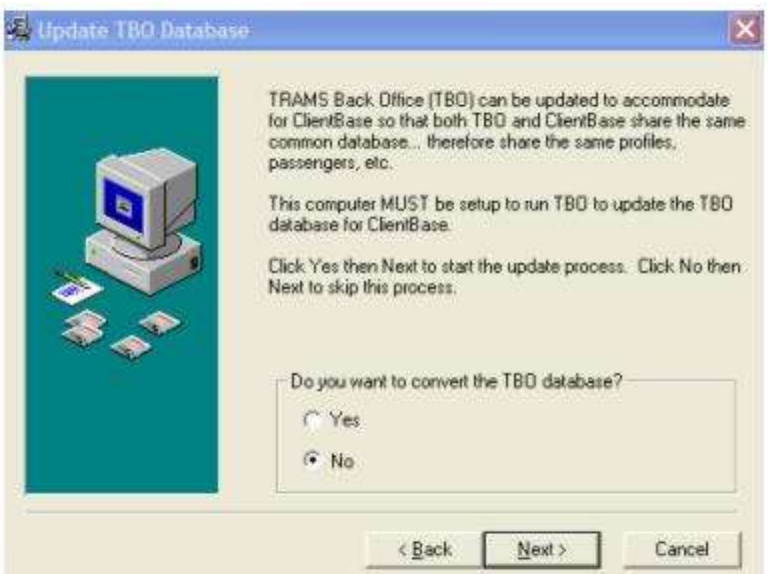


Step 7: Select “New Install” as installation type.

The next screen prompts if this is an update or a new installation. Select the “New Install” option and click Next.



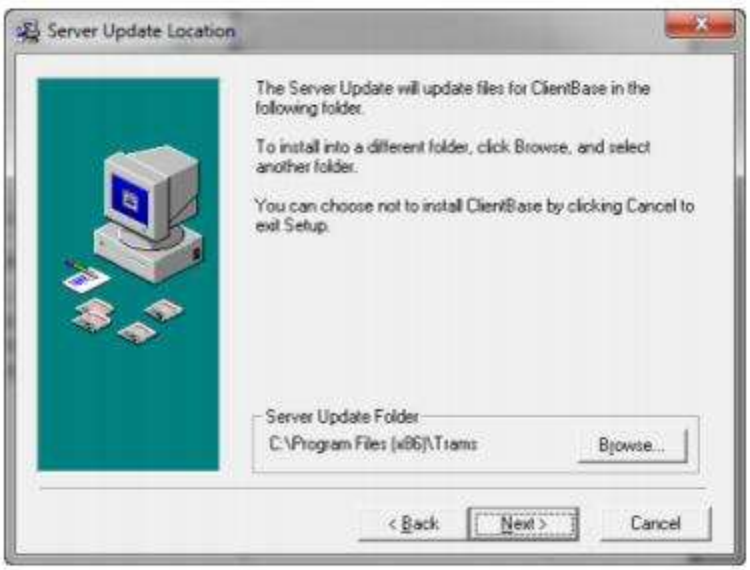
Step 8: You are not a *Trams Back Office* User, so click No, then Next.



Step 9: Identify the Country/Region from the drop-down and click *Next.*

Step 10: Identify the Destination Folder for all Files and Folders Installed.

To keep the *ClientBase* files organized, the installation routine installs all the files and folders within a folder called *Trams*. This *Trams* folder is created automatically by the installation routine, and placed within the Destination Folder selected on this screen. For continuity and support reasons, we strongly recommend using the default destination folder:



Please note, since the installation routine creates the Trams folder from the Destination Folder identified on this screen, do NOT select the Trams folder as the Destination Folder, or you end up with a Trams folder within the Trams folder. Click Next once your Destination Folder has been identified.

The Trams database is going to be located in a different location than the program files.

For XP/2003 Server, the default path is this:

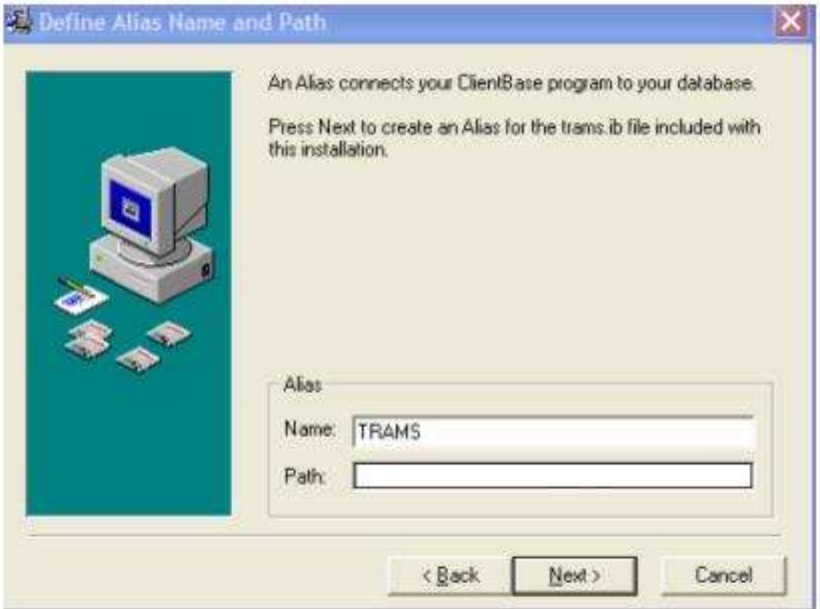
C:\Documents and Settings\All Users\Application Data\Trams\Database\trams.ib

For Vista/Windows 7 and 8, and 2008 Server, the default path is this:

C:\ProgramData\Trams\Database\trams.ib

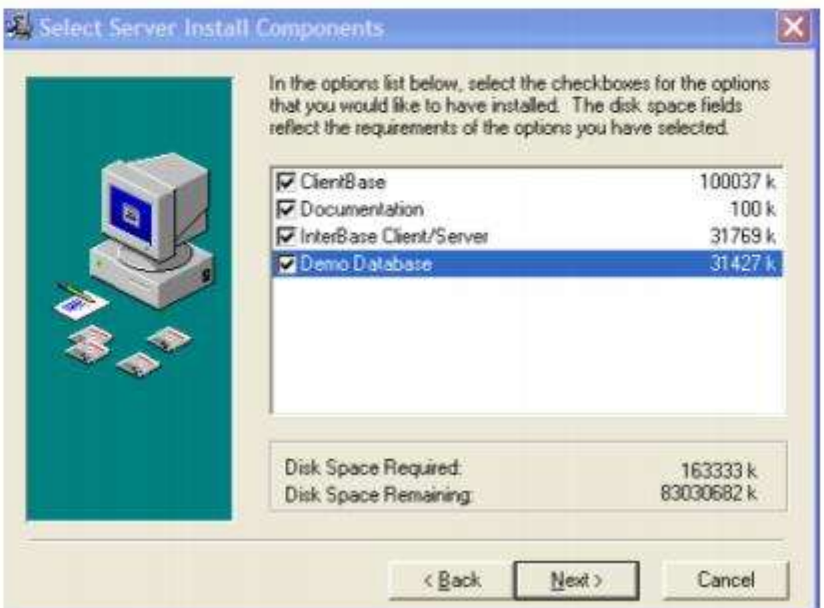
Step 11: The Alias and Path fields are completed by default, assigning the name Click *Next* to accept these defaults.

(An Alias connects the *ClientBase* program to the database. Any name can be assigned as the Alias, although, again for continuity and support reasons, we strongly recommend you use the Alias Name *TRAMS* and use the default path for support purposes.



Step 12: Select the Program Group Name for your *ClientBase* shortcut. A shortcut to the *ClientBase* program is created under the Program Group name specified here. By default the installation wizard creates a Program Group called *Trams*. If you would like the *ClientBase* shortcut listed under a different Program Group, select from the list provided. Once installation is complete, you can run the *ClientBase* program by going to **Start|Programs**, selecting the Program Group name identified here, and selecting the shortcut called CBPlus.

Step 13: Select the components you want installed. Select the components to install (default selections are already checked). Click *Next*.



Step 14: Enter the Interbase Serial number and access code give the agency in the installation letter:

Step 15: Review your answers and Finish.

The next screen summarizes your answers to the questions and provides the details of what is to be installed. If you agree with this screen, select *Finish*, otherwise, select *Back* until you find the information to change. Now all the files are copied to the destination folder and some sub folders. Upon successful installation, you receive a prompt that the installation is complete and to restart your computer.

After the *ClientBase* Server is setup, **proceed to install *ClientBase* on the workstations**, by following the directions below.

Step 16: Download and install the latest *ClientBase* updates by following the instructions at www.sabretravelnetwork.com/*trams*. Click on Support and *Software Updates*.

Install ClientBase Windows on Server - Agency Uses Trams Back Office

Use these directions if installing *ClientBase* on a server that already has Trams Back Office and Interbase installed. We strongly recommend setting up your server with the *ClientBase* program and establishing your database before installing on your workstations.

Be sure to exit all applications prior to beginning the installation. Since you are using *Trams Back Office*, please confirm the following:

1.You have the most current version of *Trams Back Office* installed
2.You have a current, valid backup of the *Trams Back Office* database
No one is currently logged into *Trams Back Office* for the duration of the
3.installation

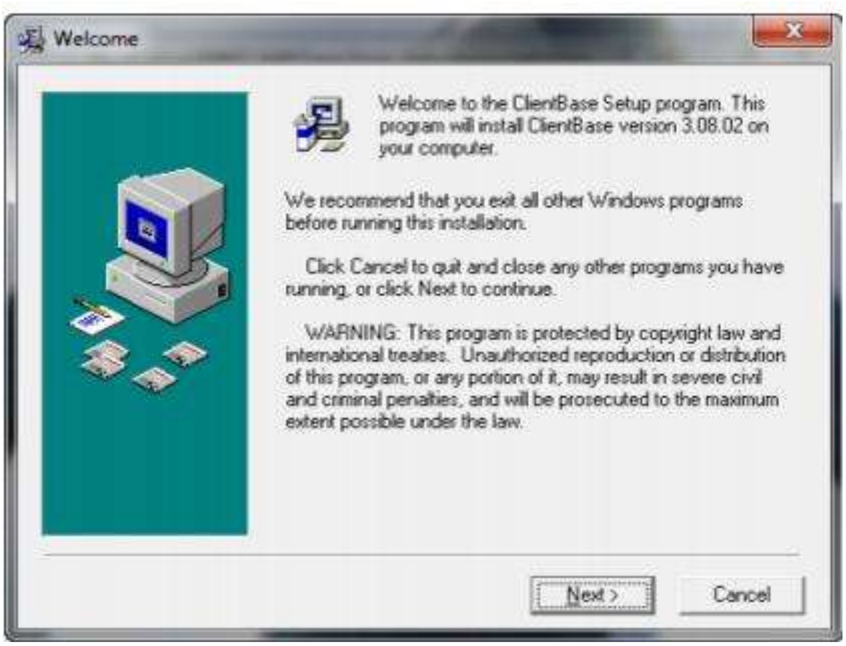
Use these directions to install *ClientBase* if your agency already has a Tram Back Office database. Someone from the *Trams* implementation team will contact you to assist with installation. If you are not contacted, e-mail **Trams.Implementation@sabre.com** for assistance.

Step 1: Download the *ClientBase* installation .exe file onto a folder on your server's hard drive and if possible save to a shared folder that can be accessed from the workstations on the network. The file is located here: **http://static.trams.com/tramslibrary/Releaseandupdatefiles/fullsetup.html.** There is one file for all countries/regions.

The file is quite large, so this may take some time to download if you have a slow connection. Run the setup.exe from the file you downloaded on your server by double-clicking the icon. An installation wizard loads.

Step 2: Select *Next* at the Welcome Screen.

Again, be sure to exit all applications prior to beginning the installation. Confirm you have the most current version of *Trams Back Office* installed, that you have a current, valid backup of the *Trams Back Office* database and that no one is currently logged into *Trams Back Office* for the duration of the installation. When ready to begin the installation, click Next.



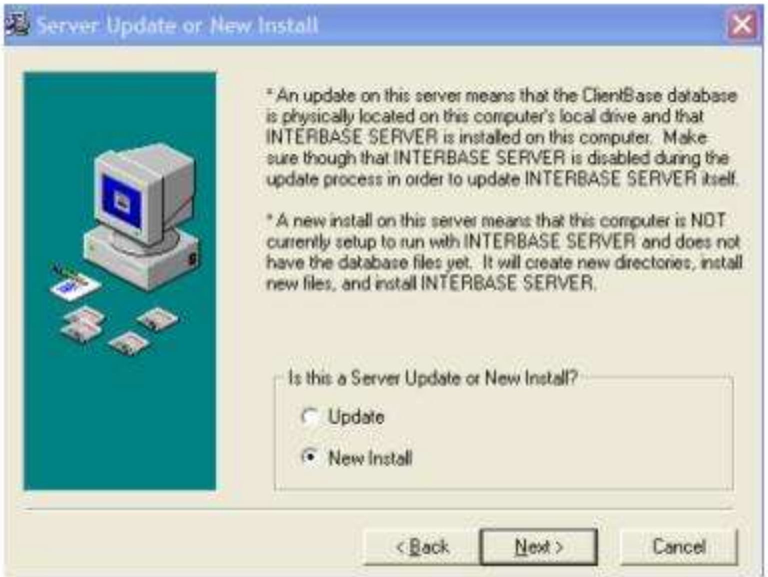
Step 3: Select *Agree* at the Software License Agreement Screen.

In order to install and run any *Trams* Products and Services software you must agree to the terms of our Software License Agreement. For your convenience this agreement is displayed within the installation wizard so that it can be reviewed and agreed to before installing our software. If you have any questions on the terms of this agreement please contact **Trams.Billing@*sabre*.com**, or your area sales representative.

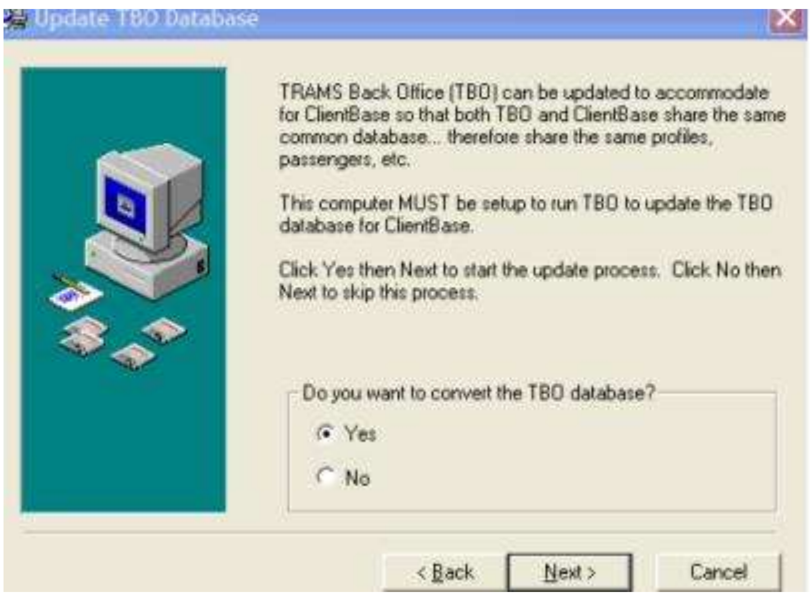
Step 4: The next few screens prompt you with questions to help guide you through the proper installation for your agency and server. Click *Next* to continue, or *Back* to go back a screen. The wizard allows you to move forward and backward through each prompt, ensuring proper answers before beginning the installation process.

Step 5: Select "Workstation Only" as installation type. Click the *Workstation Only* option and then click *Next*.

Step 6: Select “New Install” as installation type. The next screen prompts if this is an update or a new installation. You currently have *Trams Back Office* but not *ClientBase*, so this is a new install. Select the “New Install” option and click Next.



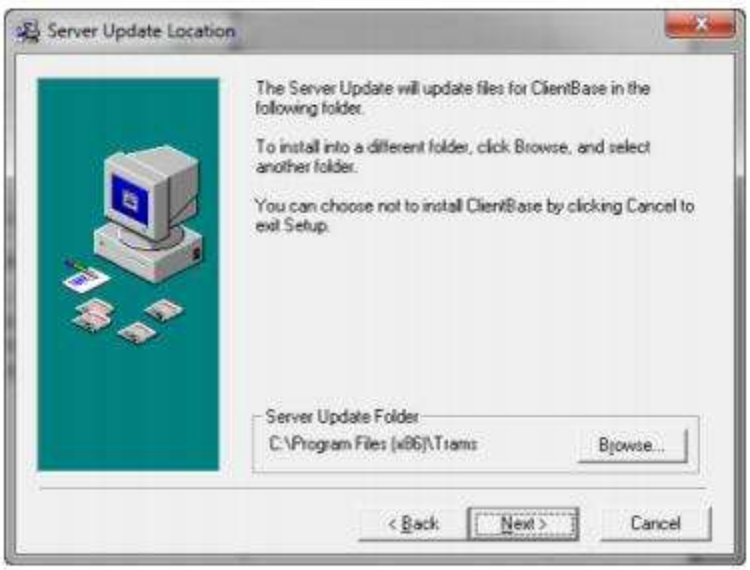
Step 7: Identify that you are a *Trams Back Office* User. This screen identifies whether the installation should connect to an existing *Trams Back Office* database or whether it should install a new blank database. Since you are a *Trams Back Office* user, click Yes, then Next.



Step 8: Identify the Country/Region from the drop-down and click *Next.*

Step 9: Identify the Destination Folder for all Files and Folders Installed.

To keep the *ClientBase* files organized, the installation routine installs all the files and folders within a folder called *Trams*. This *Trams* folder is created automatically by the installation routine, and placed within the Destination Folder selected on this screen. For continuity and support reasons, we strongly recommend using the default destination folder:



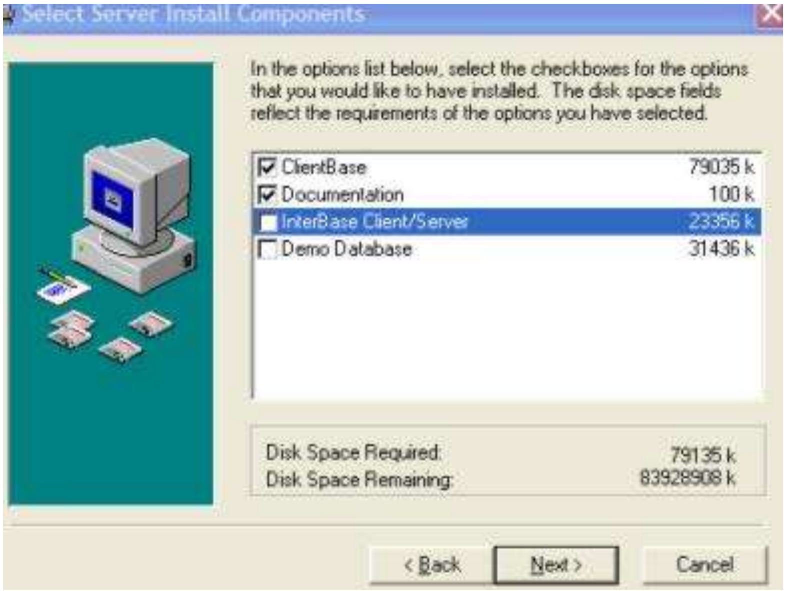
Please note, since the installation routine creates the *Trams* folder from the Destination Folder identified on this screen, do NOT select the *Trams* folder as the Destination Folder, or you end up with a *Trams* folder within the *Trams* folder.) Click *Next* once your Destination Folder has been identified.

Step 10: Enter the Alias and Path to your current *Trams* database file (*Trams*.ib). Because the agency uses *Trams Back office*, the database file already exists, so enter the path to the *Trams*.ib so that *ClientBase* can connect to it.

To verify the proper path to your *Trams*.ib, click **Start|Programs|*Trams Back Office*|Alias Utility.** A list of database Aliases will be displayed. Click once on your *Trams* alias to highlight. Once highlighted, click the path then use <Ctrl> C to copy the path. Toggle back to your *ClientBase* install wizard and use <Ctrl> V to paste the path into the path field. Close the Alias Utility. When finished, click *Next* to continue.

Step 11: Select the Program Group Name for your *ClientBase* shortcut. A shortcut to the *ClientBase* program is created under the Program Group name specified here. By default the installation wizard creates a Program Group called *Trams*. If you would like the *ClientBase* shortcut listed under a different Program Group, select from the list provided. Once installation is complete, you can run the *ClientBase* program by going to **Start|Programs**, selecting the Program Group name identified here, and selecting the shortcut called CBPlus.

Step 12: Select the components you want installed. Select the components to install (default selections are already checked). Since you have *Trams Back Office* installed on this computer, you have Interbase installed. Notice that the Interbase Client Server component is NOT selected. This is because the installation program detects Interbase and knows that it does not need to be installed. Click *Next*.



Step 12: Review your answers and Finish. The next screen summarizes your answers to the questions and provides the details of what is to be installed. If you agree with this screen, select *Finish*, otherwise, select *Back* until you find the information to change. Upon successful installation, you receive a prompt that the installation is complete. Restart your computer.

Step 13: Add the *ClientBase* tables to your *Trams Back Office* database. Because you selected *Yes* to upgrade the *Trams Back Office* database, there is now a prompt for a database conversion. The database path is completed from the alias and path you entered earlier. The SYSDBA and username and its password are the defaults. If this has already been changed in your *Trams Back Office* database, please be sure to change the password to your setting. Be sure no one is in the *Trams Back Office* program before pressing *OK* and starting the conversion.

After clicking *OK*, you are notified that the database will be changed. The utility to upgrade the *Trams Back Office* Database takes around 10 minutes to complete depending on your hardware. You are prompted when the installation is complete.

To start the *ClientBase* program, go to **Start|Programs|*Trams*|*ClientBase*,** or click the *ClientBase* icon on your desktop. There is a prompt for the *ClientBase* serial number and access code found on the startup e-mail you received. The *ClientBase* Alias defaults to *Trams*. Enter the Username SYSDBA (System Database Administrator) and Password sent to you in your startup e-mail (lowercase) to start. Make sure you are able to enter the program on the server before starting the installation on the workstations.

***Need to convert an existing *ClientBase* by *Trams* or *ClientBase* by Third Party Solutions database to *ClientBase*? Contact **Trams.Implementation@sabre.com** for assistance.

Set Up *ClientBase* Workstations

Confirming Workstation Requirements

Each workstation set up to run the *ClientBase* program must meet the minimum requirements described at the beginning of this chapter. For optimal performance, a recommended configuration is also included. Memory is especially important to address and may vary from workstation to workstation depending upon the user and the number of applications they may want to run simultaneously. The more programs running at one time, the more memory we recommend for this set.

Understanding Network Protocol

The network protocol that can be used with *ClientBase* is TCP/IP. To see the protocols on your computer, go to the Control Panel and select the Network icon. In the next screen, look at the Protocol tab. This screen list the protocols that are already installed on your computer.

Using TCP/IP protocol to connect to the *Trams*.ib:

For XP/2003 Server, the default path is this:

Server Name: C:\Documents and Settings\All Users\Application Data\Trams\Database\trams.ib

For Vista, Windows7 and 8, and 2008 Server, the default path is this:

Server Name:C:\ProgramData\Trams\Database\trams.ib

Install *ClientBase* on the Workstations

After installing *ClientBase* and setting up your database on the *ClientBase* server, go to each workstation and follow the steps below to install the *ClientBase* program and InterBase on each set. You probably need to reboot the workstation upon completion, so be sure to exit all applications on each set prior to beginning the installation routine.

Step 1: Run the setup.exe from the file you downloaded on your server. Go to **Start|Run** and navigate to the installation file by clicking *Browse* and double-clicking on the file. An installation wizard loads and walks you through the installation of *ClientBase*.

Step 2: Select Next at the Welcome Screen.

Again, be sure to exit all applications prior to beginning the installation. When ready to begin the installation, click *Next*.

Step 3: Select and Agree at the Software License Agreement Screen. In order to install and run any *Trams* Products and Services software you must agree to the terms of our Software License Agreement. For your convenience this agreement is displayed within the installation wizard so that it can be reviewed and agreed to before installing our software.

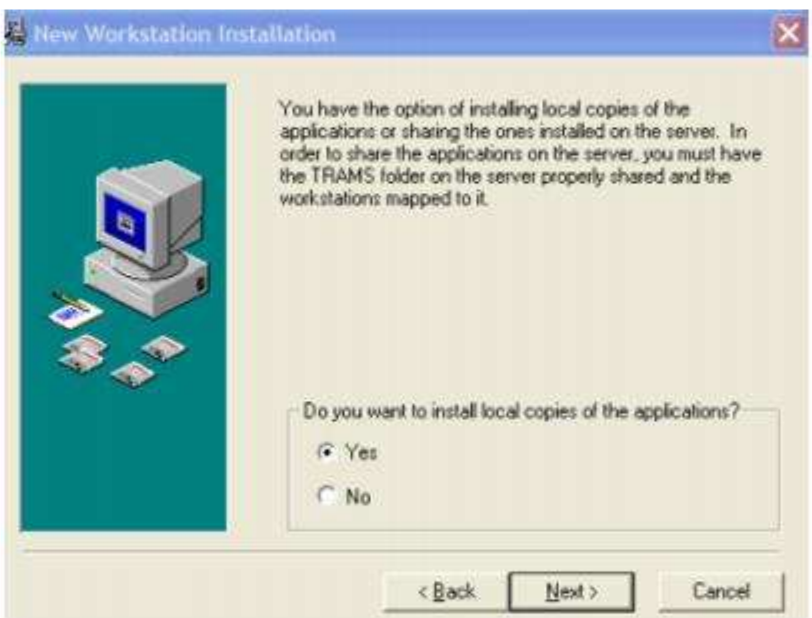
Step 4: Select Next to start the Installation Wizard. The next few screens will prompt you with some questions to help guide you through the proper installation for your agency and server. Press *Next* to continue, or *Back* to go back a screen. The wizard allows you to move forward and backward through each prompt, ensuring proper answers before beginning any of the installation process.

Step 5: Select "Workstation Only" as installation type.

You are prompted for the type of installation. Click the "Workstation Only" option and then click *Next*.

Step 6: Select "New Install" as installation type. The next screen prompts if this is an update or a new installation. If *ClientBase* is already installed on your workstation, this would be considered an update. If you currently have *Trams Back Office*, but not *ClientBase*, this is still a new install. Select the "New Install" option and click *Next*.

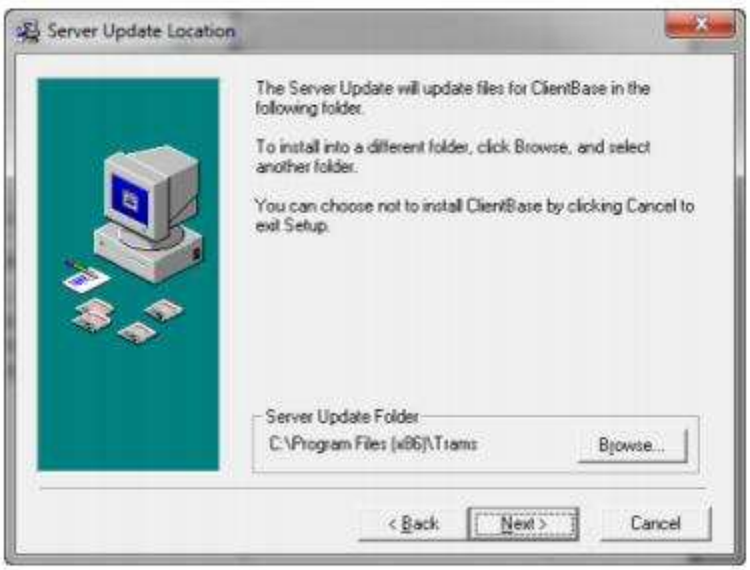
Step 7: Select whether to install the application locally or not. Although the *ClientBase* database is only installed on the *ClientBase* server, the application can be installed locally onto each workstation. For speed and reliability, installing the application onto each workstation is recommended. Keep in mind though, that if the application file (cbplus.exe) is installed locally, then each workstation will need to be updated each time a *ClientBase* update is released. Select *Yes* to install the application locally, select *No* to direct your *ClientBase* shortcut to your Server's shared directory.



Step 9: Identify the Country/Region from the drop-down and click *Next.*

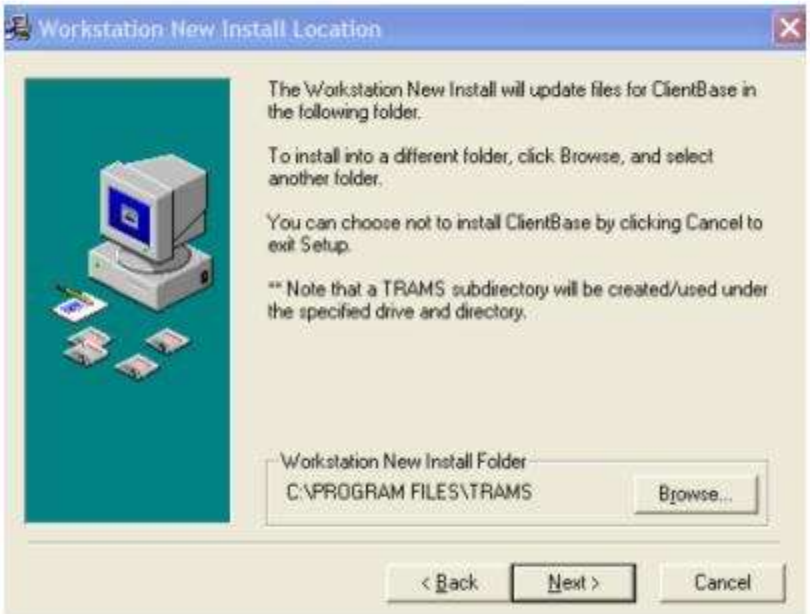
Step 10: Identify the Destination Folder for all Files and Folders Installed.

To keep the *ClientBase* files organized, the installation routine installs all the files and folders within a folder called *Trams*. This *Trams* folder is created automatically by the installation routine, and placed within the Destination Folder selected on this screen. For continuity and support reasons, we strongly recommend using the default destination folder:



Please note, **Step 8: Identify the Destination Folder for all files and folders installed.**

To keep your *ClientBase* files organized, the installation routine installs all of the files and folders within a folder called *Trams*. This *Trams* folder is created automatically by the installation routine, and placed within the Destination Folder selected on this screen. For continuity and support reasons, we strongly recommend using the default destination folder of Program Files. (**Please note**, since the installation routine creates the *Trams* folder from the Destination Folder identified on this screen, do NOT select the *Trams* folder as the Destination Folder, or you will end up with a *Trams* folder within the *Trams* folder.) Click *Next* once your Destination Folder has been identified.



Please Note: If you opted not to install the application locally in Step 7, this screen prompts for the Server's shared folder and sets up your shortcut for *ClientBase* to point to applications in that Server folder. Since the Server installation has already been completed, no files will be installed into this folder.

Step 9: Enter the Alias and Path to your database file (*Trams*.ib). As explained in the terminology section of this chapter, an Alias connects the *ClientBase* program to the database. Any name can be assigned as the Alias, although, again for continuity and support reasons, we strongly recommend you use the Alias Name *Trams*. The Path connects the program to the database, which resides on the server. Therefore, you must direct the path to the server name (DO NOT use a mapped drive) and the folders in which the database file (*Trams*.ib or *Trams*.gdb if you already had TBO installed on your server) resides.

Using TCP/IP protocol to connect to the *Trams*.ib

For XP/2003 Server, the default path is this:

servername:C:\Documents and Settings\All Users\Application Data\Trams\Database\trams.ib

For Vista and 2008 Server, the default path is this:

servername:C:\ProgramData\Trams\Database\trams.ib

Note: Many times the servername is inadequate and you may have to use the IP Address of the server instead. Go to **Start|Run**, type CMD and then IPConfig to get this address.

Step 10: Select the Program Group Name for *ClientBase* shortcut.

A shortcut to the *ClientBase* program is created under the Program Group name specified here. By default the installation wizard creates a Program Group called *Trams*. If you would like the *ClientBase* shortcut listed under a different Program Group, select from the list provided. Once installation is complete, you can run the *ClientBase* program by going to **Start|Programs**, selecting the Program Group name identified here, and selecting the shortcut called CBPlus.

Step 11: Select the components to install. Select the components to install (default selections are already checked). If you have *Trams Back Office* installed on this computer, then you probably already have Interbase Client installed. If so, you should notice that the Interbase Client Only component is NOT selected. This is because the installation program detects Interbase and knows that it does not need to be installed. If you do not have InterBase Client installed on this computer, then a check WILL appear next to *Interbase Client Only* component, so be sure to install it, as Interbase is necessary to run *ClientBase*. Pick the components you want and click *Next*

Step 12: Review your answers and Finish.

The next screen reviews the answers to the questions you have answered and provides the details of what is to be installed. If you agree with this screen, select *Finish*, otherwise select the *Back* until you find the information to change.

The files are copied to the workstations and you are notified when the workstations installation is complete. Reboot the computer.

To check that your installation is working, go to **Start|Programs|*Trams*|CBPlus**. Select the Alias you have set up from the drop-down menu. Enter your username and password and click *OK* to connect. Please see the troubleshooting section if this does not connect.

Troubleshooting

There are several different levels to check if the workstation is not connecting to the server. Let's start with some high level checks first:

1. Make sure you can still get into *ClientBase* on the server

2. Verify the password you are using. Remember it is case sensitive.

3. Next, verify that Interbase Client and *ClientBase* are installed on the workstation.

4. On the workstation, verify the path in the Alias Utility. Review the previous section about the alias utility.

5. Check that TCP/IP is the protocol - This should be completed by your Network administrator.

6. Is your Network communicating between the two machines? If using TCP/IP, ping the server.

7. Do you have the HOSTS file installed?

8. Do you have the right port request entry in your services file?

To Check if Interbase is Installed and Running

You must be on Interbase version 6.0 or above to run *ClientBase*. Go to your server. Go to **Start||Control Panel|Administrative Tools** and find the **Services** icon. Check that the Interbase Guardian is showing as a status of "Started."

Logging into *ClientBase*

The first time you log into *ClientBase*, go to **Start|Programs|*Trams*|CB Plus,** or click on the CB icon that was created on your desktop at installation. The Login Name is SYSDBA, and the password was supplied to you in the startup e-mail sent to your agency. It is not a good idea to use the login SYSDBA for anything other than security setup. **It is suggested you**

change the SYSDBA password as soon as possible. But be careful not to misplace the new password! Please refer to Packet One of the *ClientBase* QuickStart Training program kit for initial setup procedures. These instructions can also be found on the *Trams* website at **www.sabretravelnetwork.com/*trams***. Click on **Training|Getting Started**.

Trams License Manager

The software license manager monitors the number of users logged into the database, and compares it to your Access Code which reflects the number of users your agency is licensed for with *Trams* Products and Services. When accessing the *Trams* database using any of *Trams* applications, the *Trams* License Manager verifies that connection can be made to the .ib (.gdb in some cases) and that a current version of the License Manager is enabled.

The *Trams* License Manager utilizes Port 8090 for communication. This port must be opened on any firewall that a company may be utilizing to filter traffic internally. It also must be opened externally, for remote users, in their network configuration.

If your licensed number of users is exceeded, you get the message:

Your Trams User License is currently set for X Users. You are the Xth User logging into your database. Please contact Trams Marketing to modify your User Licenses and obtain a new Access Code.

This means you have exceeded your User Licenses and can either have someone else log out of the program or contact *Trams* Marketing at 800-388-7267 or Trams.Billing@sabre.com to obtain additional licenses.

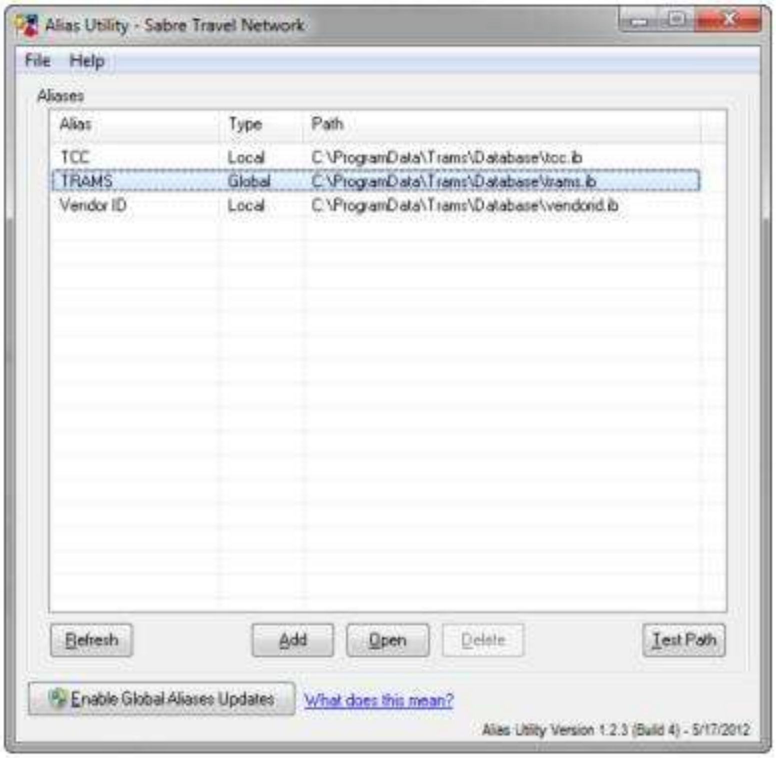
No Version of *Trams* License Manager

If the *Trams* License Manager is not running on the remote server, the following error screen is displayed.

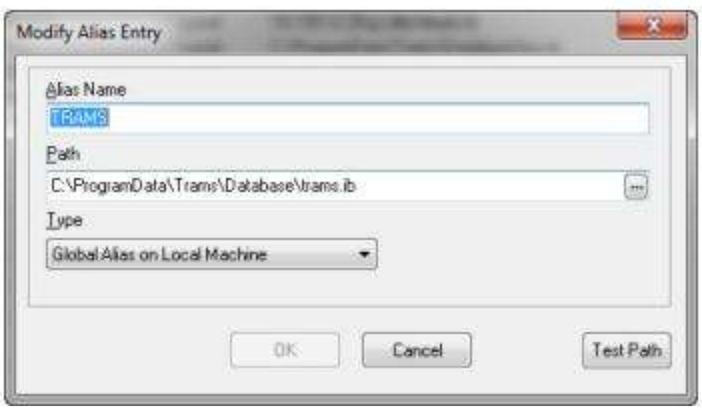
Click *OK* to acknowledge this screen to enter *Trams* program if on server, or try stopping/starting License Manager under **Control Panel|Administrative Tools|Services**. The License Manager will not allow remote connection to the *Trams* database unless the *Trams* License Manager is running. If the *Trams* License Manager is running, and you still get this message, check to see that the Alias is mapped correctly. A firewall or antivirus programs, too, may be blocking the License Manager as well. If you need assistance in troubleshooting this, e-mail, **Trams.CBSupport@sabre.com**.

Trams Alias Utility

The Alias Utility manages the location of your *Trams* database/s. An alias is simply a *shortcut* name to the long path which maps to the location of the database. By default you probably only have two aliases setup, *Trams* (your *Trams* database), and *DemoData* (a database with sample data in it that you can use to experiment with the program). But you can have as many databases as you want. Access the *Trams* Alias Utility in the program group by going to **Start|Programs|*Trams Back Office*|Alias Utility.**



Enable Global Aliases Updates to *add, modify, or delete* an Alias.



Alias Name: The short name of the long path to the database.

Path: The path that leads to the Alias's database.

Test Path: When setting up a new Alias, *Test Path* allows you to test if this is the correct path.

Global Alias On Local Machine: Currently aliases are set up per user. If you have multiple users on a machine (as a Terminal Server), then each user needs to have a copy of the alias setup. With *Global Alias*, an administrator sets up one global alias on the machine that is used by all users on that machine. The *Local Host* is used on the server or on a single user machine.

Special Note: To initiate changes to the Alias Utility, make sure to log out of your *Trams* program and log back in again.

Update the *ClientBase* Program

When there is a new version of the *ClientBase* program, we'll send you an e-mail with a link to our download page on the *Trams* website at **sabretravelnetwork.com/trams/Support|Software Updates**. We offer two (2) different upgrade files for you to choose from. The first file is a full "UPDATE" file and upgrades your program from any previous version to the current version. This file is quite large. The second file is a "Patch" and is quite small, but only upgrades you from the previous version to the current version. Steps 1 & 3 are only needed if you are installing just the patch file.

Before you begin: Please do a backup by going to **Start|Programs|*Trams*| *Trams* Backup Restore**, before doing any kind of upgrade to your database. Also, be sure everyone is logged out of both *ClientBase* and *Trams Back Office*. Then follow the directions on the *ClientBase* update page.

FAQ: I have upgraded my version of *ClientBase*, but why am now I am getting an error when logging in, *Your version of cbplus.exe is not compatible?*

A: You've skipped Step 2 in the upgrade process. Go to **Start|Programs|*Trams*|CB Plus Update,** to update the database to the new program version.

Unattended Installation or Update of *ClientBase* Files

If desired, agencies can run the installation/update programs on a workstation without any prompts (without the wizard) so that the new install and update process on a workstation can be automated. In order to activate the unattended version of the setup.exe or update.exe, the **cbpparams.ini** file must be saved in the same directory as the setup.exe and/or update.exe and must contain the necessary settings that are otherwise handled via prompts in the wizard version of our installation programs. This cbpparams.ini can be downloaded from the following site:

http://static.trams.com/tramslibrary/releaseandupdatefiles/updates/misc_exe/CBPPARAMS.INI

Instructions for use:

- Download the cbpparams.ini and save in the same directory as the *ClientBase* setup/update file.
- Open the ini file and customize any of the default settings as desired. See instructions below.
- Push the setup/update file and the cbppararms.ini file to the desired workstations for running locally. Please note that the cbpparams.ini file must be saved in the same directory as the setup/update file.

Default cbpparams.ini file:

[GENERAL]

WORKSTATION INSTALL=TRUE

WORKSTATION UPDATE=TRUE

[WORKSTATION INSTALL]

ISNEW=TRUE

ALIASNAME=*Trams*

ALIASPATH="c:\program files*Trams*\DATABASE*Trams*.IB"

INSTALLDIR="c:\program files"

ISLOCAL=TRUE

INSTALLCBPLUS=TRUE

INSTALLDOCS=TRUE

INSTALLCBTCONV=TRUE

INSTALLIBCLIENT=TRUE

INSTALLCBCONV=TRUE

PROGGROUPNAME="*ClientBase* Plus"

[WORKSTATION UPDATE]

CBPLUSEXEDIR="c:\program files*Trams*\CBPLUS"

For setup.exe please note the following:

Note that the INI file is just a text file with ONLY the below sections that are applicable to the INSTALL (the other sections are for the UPDATE)

===

[GENERAL]

WORKSTATION INSTALL=TRUE

[WORKSTATION INSTALL]

ISNEW=TRUE

ALIASNAME=*Trams*

ALIASPATH="c:\program files*Trams*\DATABASE*Trams*.IB"

INSTALLDIR="c:\program files"

ISLOCAL=TRUE

INSTALLCBPLUS=TRUE

INSTALLDOCS=TRUE

INSTALLCBTCONV=TRUE

INSTALLIBCLIENT=TRUE

INSTALLCBCONV=TRUE

PROGGROUPNAME="*ClientBase* Plus"

===

Explanation:

ALIASNAME=the *Trams* DATABASE alias name that is going to be created

ALIASPATH=the path to the *Trams* DATABASE alias name above

INSTALLDIR=the directory that will install the *Trams* directory and ALL the sub directories (that means the *Trams*\CBPLUS directory gets created underneath the INSTALLDIR value

ISLOCAL=local exe's are installed (not SHARED)

INSTALLCBPLUS=the flag to say install the CBPLUS EXE's

INSTALLDOCS=the flag to say install the CBPLUS DOCS

INSTALLCBTCONV= the flag to say install the CBT conversion app and components

INSTALLIBCLIENT= the flag to say install the IB Client

INSTALLCBCONV= the flag to say install the CB conversion app and components

PROGGROUPNAME=the program group to create that will link icons to the applications

For update.exe please note the following:

The only sections of the INI file that is read by the UPDATE is below:

==================================

[GENERAL]

WORKSTATION UPDATE=TRUE

[WORKSTATION UPDATE]

CBPLUSEXEDIR="c:\program files*Trams*\CBPLUS"

==================================

Explanation:

CBPLUSEXEDIR=the directory where the CBPLUS.EXE is actually located

Time Fields throughout *ClientBase*

ClientBase uses the Windows time settings and formats the *ClientBase* time fields accordingly. Your computer's time format is set within your Control Panel under Regional and Language Options. Within the Regional Options tab select the desired Region and click customize to verify the desired time settings. The options include:

h:mm:ss:tt

hh:mm:ss:tt

H:mm:ss

HH:mm.ss

Time format notation:

h=hour

m=minute

s=seconds

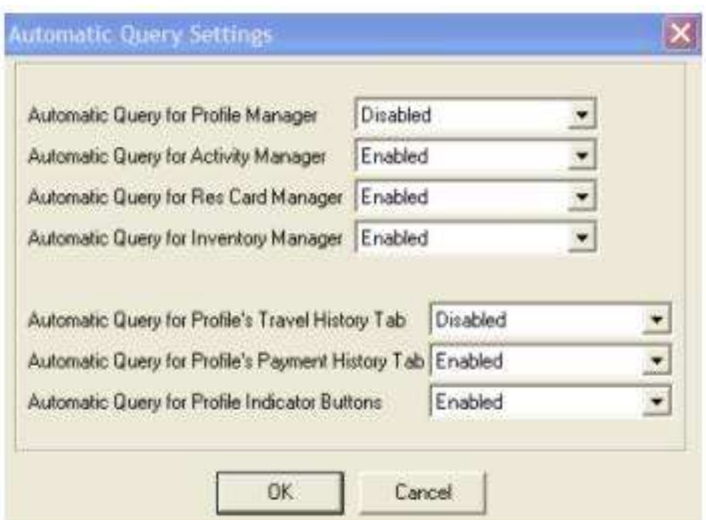
tt=AM/PM

h=12 hour

H=24 hour

When Should I Disable Automatic Queries?

Upon installation of *ClientBase*, by default all queries are automatically enabled in each of four managers (Profile, Activity, Res Card, and Inventory), as well as in the Profile Travel History tab, Profile Payment History tab, and on the Profile Indicator buttons. If your database contains more than 25,000 profiles, you may want to consider disabling this automatic Query option for optimum performance. To do this globally, go to **Global Defaults|Automatic Query Settings** and select *Disable* from the drop-down menu for any of the queries that you do not want to run automatically.



Special Note to Remote Users: Also, if you are a user connecting to the *ClientBase* database remotely, you need to disable the automatic Query option. This can be done at the workstation level, by going to **Workstation Defaults|Environment|General Options and Profile Options:.**

Frequently Asked Questions

Q: If I have *Trams Back Office* and *ClientBase*, does the TBO backup utility back up both programs?

A: Yes, it backs up the mutually shared database. But be careful when you restore the database. **When you restore one program, you are restoring both!**

Converting ClientBase by Trams Database

If you are converting from *ClientBase* by *Trams*, contact **Trams.Implementation@sabre.com** for further information on the process.

Converting ClientBase by Third Party Solutions Database

If you are converting from *ClientBase* by Third Party Solutions, contact **Trams.Implementation@sabre.com** for further information on the process.

Steps to Upgrade Interbase to XE3

Upgrading your Interbase to XE will improve the performance of your database. Contact *Trams* Support at **Trams.CBSupport@sabre.com** or 310-641-8726 to obtain the download file's path, the Interbase serial number and access code for the upgrade to Interbase XE.

Minimum Versions

TBO 3.02.02

CBW 3.06.01

IB 7.1 (do not upgrade if IB version is 6.X)

Recommended Versions

TBO 3.04

CBW 3.07

IB 7.1 or above

The download includes the **ibxeserver.exe**. This needs to be saved to your server on the desktop of the server or somewhere else easily accessible.

1. Make sure all users are logged out of *Trams Back Office* and/or *ClientBase Windows*.

2. Do a full backup of the *Trams* database. You can store the backup either on the server or on external media.

3. Rename the database file (i.e. add .old to the end of the filename). This will serve as a second backup after the upgrade. Once you are satisfied that the system if functioning properly, the old database file can be deleted.

4. Install ibxeserver.exe. Enter the Interbase serial number and access code you were given when prompted

5. After installing, either reboot the server or manually start the XE service.

6. Launch IBBackup and restore the backup that you created in Step 2. Make sure you specify a page size of 16K for optimal performance.

7. Log into the database with *Trams Back Office* and *ClientBase Windows*.

8. Install the XE3 client on the workstations. Use the same ibxeserver.exe but do a client-only install (leave the serial number and access codes blank).

Credit Card Encryption

Starting in *ClientBase* Version 3.4 and *Trams Back Office* 3.01, upon installation or updating of both versions of these programs, credit card numbers become encrypted and masked within the database. In an effort to protect your clients from credit card fraud, and to comply with recent PCI (Payment Card Industry) compliance regulations, all credit card numbers within your database have been (and will be) encrypted and masked. To a typical *ClientBase* user this encryption appears invisible, but it makes the extraction of this personal data much more difficult should your database be accessed in an unauthorized manner. Upon retrieving a credit card number within the *ClientBase* application, the system automatically decrypts the credit card number and display the full number as always. (Please note the User Permission details below where users can be forced to only view the masked version of the credit card number.)

Introduction

The Payment Card Industry (PCI) compliance and validation regulations spells out what security measures must be taken to protect the private information during any transaction occurring with the use of a paycard. The PCI Data Security Standard is used by all card brands to assure the security of the data gathered when transacting on behalf of a customer.

There are numerous regulations including encrypting the credit card numbers in the database. Encrypting this data makes it virtually impossible to decipher a credit card number without a decryption key which protects the credit card information in your database from fraudulent abuse.

How it Works

Upon upgrading your database to previous versions of ClientBase Windows 3.04 or above and Trams Back Office 3.01 or above, credit numbers become encrypted and masked within the database. In an effort to protect your clients from credit card fraud, and to comply with recent PCI (Payment Card Industry) Compliance regulations, all credit card numbers within your database have been encrypted and masked.

To a typical *ClientBase* User this encryption appears invisible, but it makes the extraction of this personal data much more difficult should your database be accessed in an unauthorized manner. Upon retrieving a Credit Number within the *ClientBase* application, the system will automatically decrypt the credit card number and display the full number as always. Please note the User Permission enhancement below where Users can be forced to only view the masked version of the Credit Card number. Also note that encryption and masking **only takes place once your database is upgraded to TBO 3.01 or above and then upgraded to 3.04, in this order.**

If you are not a TBO subscriber and would like to enable the credit card encryption features you need to download the tfwup.exe file and run this on your database to upgrade it to the appropriate TBO 3.01 version:

http://static.trams.com/releaseandupdatefiles/pub/updates/misc_exe/TFWUp(latestversion)/TFWUp.exe

Summary of steps after doing a backup of your database: 1) Install *ClientBase* Update on Server, 2) Run the tfwup.exe on database, 3) Run the cbplusup.exe on database, 4) Install the Update on each Workstation.

Upon installation of the *ClientBase* program or after running the cbplusup.exe (for clients who are updating their *ClientBase* version), the credit card data that was stored in the credit card field pre-encryption now contains a masked version of the credit card number. A new field is also added to the database. The full credit card number is copied from the existing field to the new field and then encrypted. A cleaning and masking routine takes place during the database update to standardize all of the credit card numbers so they can be properly masked for all applications utilizing the masked Credit Card field. Only valid credit card numbers are cleaned and appear in the masked format.

<u>The valid credit cards are standardized using these rules:</u>

- Any non-numeric text at the beginning of the string up to the first digit is stripped out. AX 3782 078 234 0834/1008 becomes 3782 078 234 0834/1008.
- All spaces are removed. 3782 078 234 0834/1008 becomes 37820782340834/1008.
- The credit card string is truncated starting at the first non-numeric character, usually a slash, leaving only digits. 37820782340834/1008 becomes 37820782340834.

<u>The format used for masking is:</u>

- 2-letter card code + space + first 2 digits+ '-XXXX-' + last 4 digits (i.e. MC 54-XXXX-2364).

<u>Three fields in the database relating to the credit card number:</u>

- Masked CC Number Field (CCNUMBER): Credit card number in masked format. Credit card numbers are standardized and validated. Valid credit cards are saved in its masked format and invalid credit cards are saved as is.
- Encrypted CC Number Field (NUMBERENCRYPT): Encrypted full credit card number entry (all numbers whether valid or not are encrypted).
- Hash CC Number Field (NUMBERHASH): Credit card number in hash format. This field is used for "faster searching of credit card number". Valid credit cards hash the standardized format. Invalid credit cards hash the number as is.

<u>Status of *ClientBase* Utilities:</u>

Utilities Updated: Globalware Invoice Export Utility, IC Host Utility, XML Travel History Import, Australian "Enable Automatic XML Profile Export"

Utilities Sunset (will no longer work after a database has been encrypted): XML Import, XML Export, CB2CBP conversion utility, CBT2CBP conversion utility

Utilities Not Affected: ASCII Profile Import, IB Backup, Ensemble Import, Ensemble Export, Virtuoso Utility, Virtuoso Segment Update

Use of Encryption Keys for Third Party or Custom Development:

A unique key will be generated for each agency that can be used in product development for non-*Trams* applications that need to read the full credit card number. The key can be obtained by the SYSDBA User only by going to **Utilities|Credit Card Encryption Key** and entering a password provided by the *Trams* support desk. A CCEncrypt.dll file is installed that allows access to the *Trams* database to view un-encrypted credit card numbers. Documentation for use is available upon request by e-mailing **Trams.CustomerCare@sabre.com**. The intended audience is for the designers and developers of non-*Trams* applications that read credit card numbers directly from the *Trams* database.

How to Set User Logins to Mask Credit Card Numbers

If you want *ClientBase* users to work with masked credit card numbers go to **Utilities|User Logins|User List** and *Advanced Permission Settings|Other Permissions* to check off *Mask Credit Card Numbers*. This allows you to mask full credit card numbers from users that don't have a need to view the complete number. All existing users default this setting to unchecked. Upon checking this Advanced permission and saving, the system prompts with a message: *By checking Mask Credit Card Numbers for this User, Credit entries will not be included in Merge to PNR and Live Connect, since the full Credit Number must result at the end of these features.* Please keep this limitation in mind when deciding which users should have the Credit Card numbers masked.

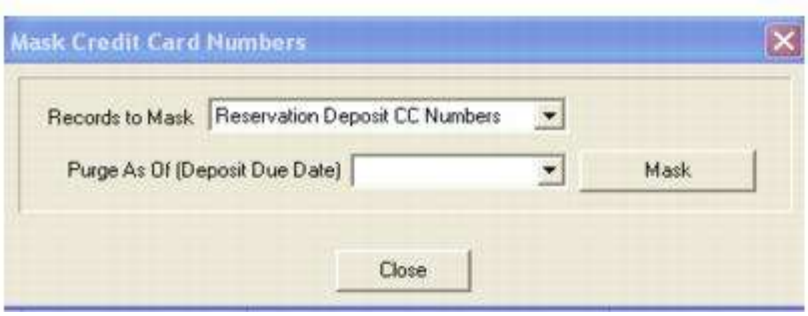
THE FOLLOWING AREAS ARE UPDATED IF THE CURRENT USER LOGIN IS SET TO *MASK CREDIT CARD NUMBERS*:

- **Profile|Cards** grid and Credit Card records mask the Credit Card Number and set to read only (in addition to Card Type)
- **Traveler|Cards** grid and Credit Card records mask the Credit Card number and set to read only (in addition to Card Type)
- **Merge to PNR Selection Screen** no longer includes any Credit Card data to select from
- **Live Connect Selection Screen** no longer includes any Credit Card data to select from
- **Res Card Reservation Deposit FOP** does not show the drop-down list of CCs although a CC number can be hand entered. Upon saving the number will be masked.
- **Existing Res Card Reservations** with a CC number, displays as masked although it can be edited and saved
- **Generate - Invoice** feature does not include the drop down list of CCs although a CC number can be hand-entered
- **File|Export|Profile Cards** info now exports the Credit Card Numbers as masked by default.

REMOVE CREDIT CARD INFORMATION

Remove credit card information for Payments, Booking CommTrack CC Numbers, and Reservation Deposit CC Numbers that may no longer be of use. To use this feature the database must be credit card encrypted. Masking the credit card number removes the full encrypted credit card number and replaces it with a masked version of the number.

Go to **Utilities|Mask Credit Card Number**:



In the Records to Mask field, choose the type of record to remove from the drop-down. *ClientBase* only database options for removal are *Payments, Booking CommTrack CC Numbers and Reservation Deposit CC Numbers*. *ClientBase* databases that are *Trams Back Office* also, can only remove *Reservation Deposit CC Numbers*. Payments and Booking CommTrack CC Numbers affect accounting data and therefore removal must occur in the TBO program.

In the *Purge As Of* field, enter the Purge Date. For example, if you wanted to remove records prior to 01/01/2008, the Purge Date is 12/31/2007. Records are removed by date as follows:

- *Payments (by Payment Date)*
- *Booking CommTrack CC Numbers (by Depart Date)*
- *Reservation Deposit CC Numbers (by Deposit Due Date)*

After entering the purge date, click *Mask*. A message appears indicating what type of records will be masked and as of what date. Click *Yes* to continue or *No* to return to the selection criteria.

PASSWORD PROTECTION

User Permission Security Enhancements (only available with Interbase XE)

- **Enable User Authentication for login security settings for password management.** EUA enabling the database allows benefits from the new password management features of setting password strengths, setting password expiration dates, as well as users being able to change their own passwords.
- All user login password security enhancements are strictly tied to EUA enabling the database. If a database is not EUA enabled, *Trams Back Office* user login password management remains unchanged and only SYSDBA can update User Login passwords.

EUA REQUIREMENTS

- IB Server and IB Client must be on IB version XE.
- The *ClientBase*/*Trams Back Office* database must be updated to IB XE.
- *Trams Back Office* table version must be DB version 37 or higher (3.3)
- *ClientBase Windows* table version must be DB version 99 or higher (3.6)

EUA ENABLING A DATABASE

To EUA enable the database a special command line prompt: cbplusup.exe –eua must be used when running the DBUP. When the command line prompt is used, if the above requirements are not met the user is prompted,

The following requirements must be met to EUA enable the database:

- Database Server version must be upgraded to version “10” or greater. The current version is “X”.
- Database File version must be upgraded to version “15” or greater. The current version is “X”
- Database Client version must be upgraded to version “10” or greater. The current version is “X”

Please verify these requirements are met and try EUA enabling again.

If the requirements for EUA enabling the database are met the user is prompted, ***You have the option of using Embedded User Authentication. Your user logins and passwords will now be directly tied to your database file. Enable EUA?***

Help|About includes a new entry: ***EUA Enabled Yes|No***

Upon EUA enabling a database all User Login passwords are converted and stored within the database, rather than within InterBase. The SYSDBA password remains unchanged. Upon logging into *Trams Back Office* as SYSDBA after EUA enabling the database, continue using the original SYSDBA password. If that password was never changed from the generic "xxxxxxxxx" password, a prompt launches upon first login to change the password.

All other User Logins have their current password converted to their login name (which is always Upper Case). As each user first logs into *ClientBase*, they will need to use their newly converted password based on their login name. For example, if the User Login name is MARY, upon first logging into *ClientBase*, the user should enter MARY into the Login Name **AND** enter MARY into the password. Upon successfully entering the User Login and Password the user is then prompted to enter a new password, to ensure security going forward. This new password is then used each time the user logs into *ClientBase*. Because the database is EUA enabled, all users can now update their own User Login passwords by going to **Utilities|Setup|User Profile** and entering a new password.

A new tab was added to **Utilities|Setup|Global Defaults** called *User Login Options* that is accessible for SYSDBA and Admin users with fields to set password expiration and password strengths.

PASSWORD EXPIRATION:

Enter the number of days until password is expired (Example: 30, 60, 90, etc.). Once password expires, when user tries to login user is directed to a new page and asked to enter the old password and a new password.

PASSWORD STRENGTH:

A setting was also added to assign password strength when creating a new password. If a chosen password does not meet the rules, user must change password before allowed to continue.

Options are low, medium or high and are described as follows:

Low Strength - Passwords must contain:

- A minimum of 1 character
- A maximum of 8 characters
- Cannot be a repeat of last 4 passwords

Medium Strength - Passwords must contain:

- A minimum of 7 characters
- A maximum of 8 characters
- At least one alpha character (a-z, A-Z)
- At least one numeric character (0-9)
- Cannot be a repeat of last 4 passwords

High Strength - Passwords must contain:

- A minimum of 7 characters
- A maximum of 8 characters
- At least one lower case alpha character (a-z)
- At least one upper case alpha character (A-Z)
- At least one numeric character (0-9)
- At least one special character (!,@,#,$,%,^,&,*,_,-,+,= etc.)
- No character may be used more than once, regardless of case
- Cannot be a repeat of last 4 passwords

Blacklisted Passwords:

For security purposes certain passwords are no longer allowed to be used in the database.

The old password that came with the installation letter, mas****** is no longer allowed for use as a password for SYSDBA. After EUA enabling the database, if the SYSDBA password is mas******, or if at any point the SYSDBA password is being changed and the original password is entered, there is a prompt to select a different password.

For user logins, the user login name and the user password can no longer be the same. After EUA enabling the database, if a password is created that matches the user login name, there is a prompt to select a different password.

Important Note about SYSDBA Password for EUA Enabled Databases

It is **extremely important that you archive the SYSDBA password to a removable storage drive as a source of password recovery. If the SYSDBA password is forgotten and was not archived, the password cannot be recovered.** To archive, when changing the SYSDBA password:

When updating the SYSDBA password in the User Profile a message is now prompted, "Do you wish to create a Password Recovery File?"

1. When selecting *Yes,* a popup screen is displayed to create a password recovery disk that reads “Please insert your password recovery drive/disk and select the appropriate drive letter to archive the password.

2. To refresh the drive list, click the drop down arrow. Then press OK to continue or Cancel to stop the process.” Click the arrow and select the drive to save the password to and click OK.

3. Once the password is on the drive the prompt, “Password successfully archived” is displayed.

4. Should the need arise to recover the password from the removable device, in the login screen click the Forgot Password link (which is only visible with the SYSDBA Login) then Insert the removable device and navigate to the removable device drive.

5. Once logged in, the new SYSDBA password should be changed and re-archived to the removable disk.

Should the need arise to recover the password from the removable device, in the login screen click the Forgot Password link (which is only visible with the SYSDBA Login) then Insert the removable device and navigate the removable device drive. Once logged in, the SYSDBA password should be changed and re-archived.

Chapter 3: Set Up ClientBase for Your Agency

This chapter discusses in detail setting up and customizing the ClientBase program for your agency - starting with Agency Global Level Settings, Branch Level Settings, User Level Settings, and finally Workstation Level Settings. Customize the program to meet specific agency needs.

This chapter contains directions for setting up ClientBase. Here is the suggested order of setup by the SYSDBA:

☐ **Set Up basic Branch information for each branch (go back later to enhance for other functions)**

☐ **Create an Agent Profile for each user (if does not exist) and link to appropriate branch in Branch field.**

☐ **Set Up User Login Group Security by going to Utilities|User Logins|Group Security Level**

☐ **Set Up User Logins by going to Utilities|User Logins|User List and link to Group Security Level**

☐ **Set Up Global Default Profile Defaults**

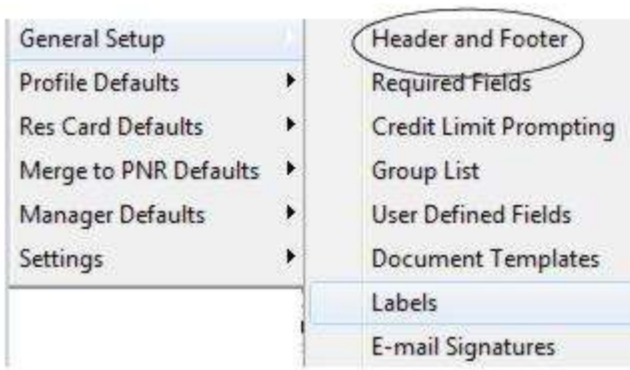
☐ **Set Up Global Default Merge to PNR Defaults**

☐ **Set Up Global Default General Setup**

☐ **Set Up all other Global Default settings as needed**

Global Defaults General Setup

Global defaults let you personalize certain aspects of *ClientBase* to meet the unique needs of your agency. Any changes made here are global and reflected for **<u>every</u>** workstation and **<u>every</u>** profile (but some can be overwritten). General Setup settings regulated throughout the program: *Headers and Footers; Required Fields, Credit Limit Prompting; Group List; User Defined Fields; Document Templates; Labels* and *E-mail Signatures.*



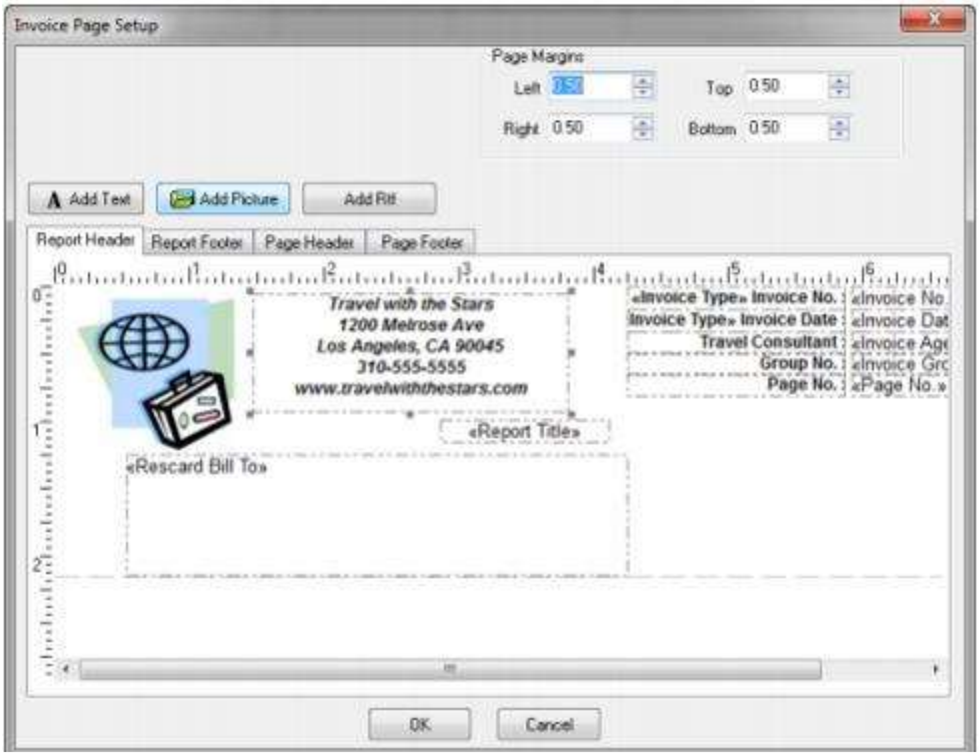
Headers and Footers

To print agency letterhead automatically for invoices, trip proposals, itineraries, trip statements, document templates, reports, and receipts, go to **Global Defaults|General Setup|Header and Footer**. Agencies with multiple branches have the option of setting up just one global header/footer and use the branch merge fields for customization by branch.

Note: Settings at the branch level override the global level, if headers/footers have been setup areas in both locations. Likewise header/footer settings in the actual document template override the global level, if headers/footers have been setup in both locations.) Click *Invoice, Trip Proposal, Itinerary, Trip Statements, Document Templates, Reports,* or *Receipts* to setup Headers/Footers:

Note: Need to have individual logos for separate branches? See section below, *How to Set Up User Level Logos in Headers/Footers*.

Report Header/Report Footer/Page Header/Page Footer Tabs: Click the desired tab to setup the headers and footers. The report header is the header on the first page of the report, the report footer is the footer on the last page in the report. The page header is for each page of the report, and the page footer is for each page of the report. If you have a Report Header/Footer and Page Header/Footer all setup, each prints on each of the pages you designate.



Add Text: Use *Add Text* to insert text into the header or footer. A text box appears in the upper left corner. To type and format text, double-click the text box. A screen appears to enter your desired text, align the text, add merge fields (see below), and set the font. Click *OK* to go back to the main screen.

Add Picture: Use *Add Picture File* to insert a graphic file. Use the browse feature to locate the graphic file on any drive/directory and click *Open* once located. (Use *.jpg, *.jpeg, *.bmp, *.ico, and *.emf type graphic files within headers and footers.) Double-click the graphic to access dialog box to set size and page alignment, or highlight the graphic to click and drag, size, and position it properly.

Note: To specify a size for your logo, double-click on the logo (do not try to resize in the header or footer area as this may distort image):

Add RTF: An RTF box provides slightly more formatting than a text box. Notice the formatting toolbar and merge fields.

HEADER/FOOTER MERGE FIELDS

Use the *Add Text* or *Add RTF* button to create any text box. Size it and move it by using the 2-directional and 4-directional arrows. Double-click within the box to enter text and click the *Insert Merge Field* to obtain a listing of all the merge fields available.

Invoice Merge Fields include: *Bill To Address 1, Bill To Address 2, Bill to Apt/Suite, Bill To City, Bill To State, Bill To Zip, Branch Address, Branch City/State/Zip, Branch E-mail, Branch Fax, Branch Name, Branch Phone, Branch Website, Client Profile #, Company Name, Contact Name, Courtesy Title, Date/Time, First Name, Interface ID, Last Name, Middle Name, Name, Page No. Invoice Agent, Invoice Agent, Invoice Date, Invoice Group, Invoice No., Invoice Type, Name, Page No., Primary Address 1, Primary Address 2, Primary Agent Name, Primary Apt/Suite, Primary City, Primary E-mail, Primary Fax, Primary Phone, Primary State, Primary Zip, Profile Number, Receipt Date, Receipt Group, Receipt No., Report Title, Rescard Bill To, Rescard Ship To, Salutation, Salutation|Courtesy Title Last Name, Salutation | First Name, Salutation | Name, Ship To Address 1, Ship To Address 2, Ship to Apt/Suite, Ship To City, Ship To State, Ship To Zip, User Login Agent Name and User Login Name.*

By moving the invoice header information like *Invoice No., Date, Res Card Bill To Address* into merge fields that are part of global default headers/footers, you have flexibility on how this data appears, where it lands and how much room on the page to take up.

Note: *Res Card Bill To* and *Res Card Ship To* merge fields appear in the text box as one line, but when merged can take up to 5 lines of address information, so be sure provide a large enough text box when using these merge fields.

Trip Proposal Merge Fields: *Branch Address, Branch City/State/Zip, Branch E-mail, Branch Fax, Branch Fax, Branch Name, Branch Phone, Branch Website,* and *Page No.*

Itinerary and Trip Statement Merge Fields include *Branch City/State/Zip, Branch E-mail, Branch Fax, Branch Name, Branch Phone, Branch Website, and Page No.* as merge fields.

Document Template Merge Fields include *Agent* (which adds the *User Login Name* or *Primary Agent Name*), *Branch City/State/Zip, Branch E-mail, Branch Fax, Branch Name, Branch Phone, Branch Website and Date/Time*.

Report Merge Fields include *Branch Address, Branch E-mail, Branch Fax, Branch Name, Branch Phone,* and *Branch Website*.

Receipt Merge Fields: Include *Bill To Address 1, Bill To Address 2, Bill To City, Bill To State, Bill To Zip, Branch City/State/Zip, Branch E-mail, Branch Fax, Branch Name, Branch Phone, Branch Website, Client Profile #, Contact Name, Date/Time, Interface ID, Name, Page No., Primary Address 1, Primary Address 2, Primary Agent Name, Primary Apt/Suite, Primary City, Primary E-mail, Primary Fax, Primary Phone, Primary State, Primary Zip, Profile Number, Receipt Date, Report Title, Rescard Bill To, Rescard Ship To, Salutation, Salutation|Courtesy Title Last Name, Salutation|First Name, Salutation|Name, Ship To Address 1, Ship To Address 2, Ship To Apt/Suite, Ship To City, Ship To State, Ship To Zip, User Login Agent Name, and User Login Name.*

Note: *Res Card Bill To and Res Card Ship To* merge fields appear in the text box as one line, but when merged can take up to 5 lines of address information, so be sure provide a large enough text box when using these merge fields.

Print: Select from the drop-down list either *On All Pages, On First Page Only,* or *Different First*

PAGE HEADERS/FOOTERS, PRINT OPTION

Print: Select from the drop-down to determine where and when to print. On a one-page document, the Page Headers/Footers will appear on the single page.

On All Pages**:** Appears on all pages regardless of the number of pages. If *Report Headers/Footers* exist, the *Page Header* appears just below the *Report Header,* and the *Page Footer* appears just above the *Report Footer*.

On First Page Only: Appears on just the first page, or if a single page document appears on that single page. If *Report Headers/Footers* exist, the *Page Header* appears just below the *Report Header* and the *Page Footer* appears just above the *Report Footer* on Page 1.

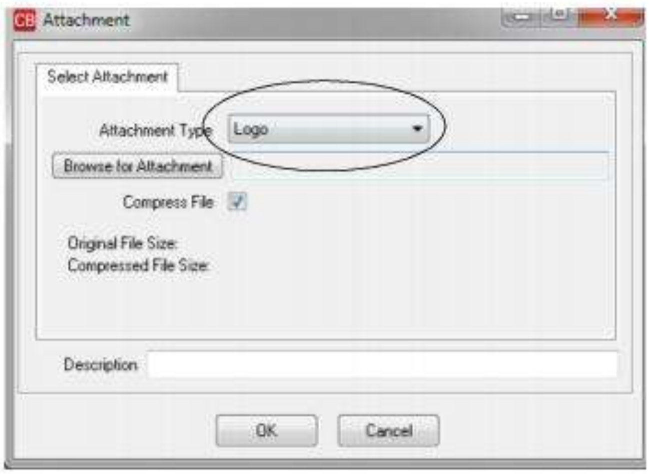
Skip First Page: Appears only starting with Page 2 of the document. If it's a single page document, then it does not appear.

How to Set Up User Level Logos in Headers/Footers

Logos can be added to Headers and Footers at the user level for use on Invoices, Itineraries, Trip Proposals, Trip Statements and Receipts. Some agencies have the need for an agent to have his or her own unique branding to appear on Invoice, Statements, etc. (such as agents who are Independent Contractors). To use the agent logo feature, it is necessary to add the agent's logo to the Agent's profile and to add the *Primary Agent Logo* merge field to Headers and Footers.

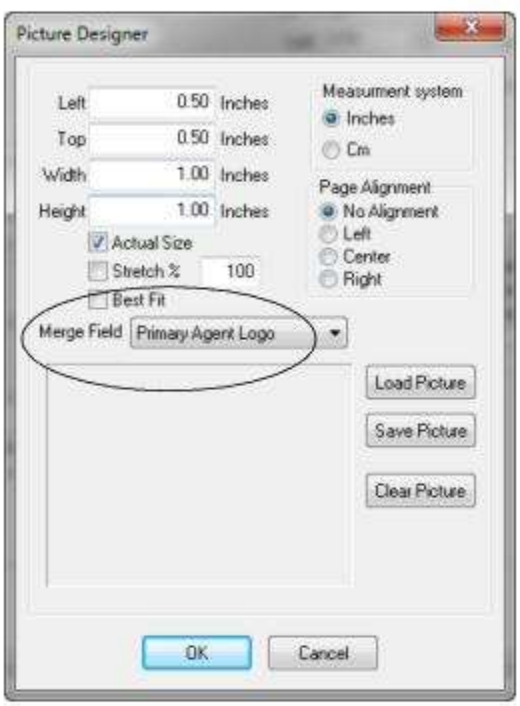
The agent's user login must be associated with an agent profile. Verify that the Agent Profile field is completed in the user login settings. If Agent Profile is missing from the user login, the SYSDBA user must login and complete it. (**Utilities|Setup|User Logins|User List.**)

Next, query and select the agent profile, click the Attachments tab and *Add*. There are two Attachment Types of Logo and General (for attachments other than logos).



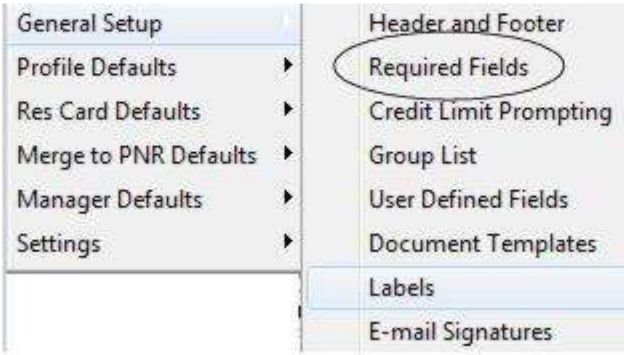
Select Logo, then Browse for Attachment and select the agent's logo image. Agent's logo image must be a *.jpg, *.jpeg, *.bmp, *.ico, or *.emf type graphic file. Make sure it's the correct size before you import it. Complete the Description field and click OK to save.

After saving the agent logo, select the desired Header and Footer (Invoice, Trip Proposal, Receipt, etc.). Double-click on the global logo image to open the Picture Designer.



Do not change the current logo image. Click the down arrow on the *Merge Field*, select Primary Agent Logo from the drop down and click OK to save. Repeat these steps to add the Primary Agent Logo merge field to each Header and Footer (Invoice, Trip Proposal, Receipt, etc.).

If a logo exists in the Agent Profile, that logo is merged on to the document **as long as the Primary Agent Logo merge field** is entered in the Header and Footer. If no logo exists in the Agent Profile, or if the agent's user login does not have an assigned Agent Profile, the agency's usual Header and Footer is used (Branch level or the Global level).



Required Fields

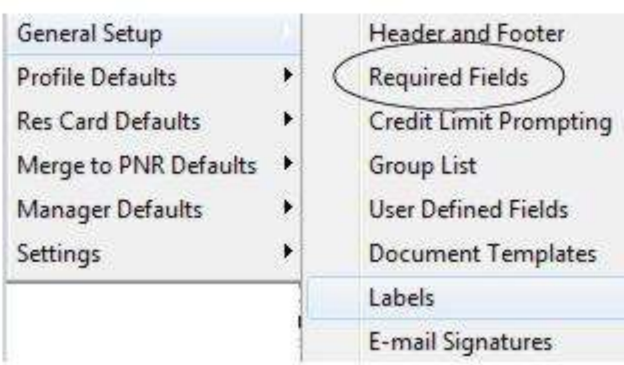
Database administrators can designate certain fields within a Profile, Activity or Res Card record as a mandatory field that must be completed for the record to be saved. By default, no fields in a Profile, Activity or Res Card are set as mandatory, but by going into and selecting the record type, set any field as either *Required*, which means you cannot save the record without completing this field; or as *Optional* which creates a reminder prompt when saving the record. If this field is left blank, the system still saves the record.

Required fields for Profiles include *General, Travelers, Marketing* and *More Fields*. Required fields for Activities include *Reminder/Note/Mailer Type, Subject,* and *Remarks*. Required fields for Res Cards include *More Fields, Reservation Level Fields,* and *Service Provider Fields*.

Note: When a profile is set to *Inactive,* required fields are disabled.

Note: There is a Communications tab in the Required Fields for Profile menu for all Profile types, because Primary Communication entries can now be located at either the Profile or the Traveler levels. If Required or Optional for any communication entry is enabled, when creating a new profile or editing an existing profile, ClientBase looks first for a communication entry that is marked as the profile's Primary. If none is found, it checks for the Primary Traveler's Primary Communication entry. If the required/optional entry is completed at one of the two levels, the requirement is met.

Tip: When agents are first learning to use *ClientBase*, it is **not** a good idea to set too many fields as *Required*, as this may discourage them from using the program.



REQUIRED FIELDS FOR TSA REQUIREMENTS

There is a Travelers/Contact tab to setup required fields to help track traveler information for TSA Requirements. Information needed to meet TSA Requirements such as *Gender, Middle Name, and Birth Date (day, month and year)* are included, as well as *Relationship, Courtesy Title, First Name, Last Name, Citizenship, Primary Passport Number, Primary Passport Issue Date, Primary Passport Issue City, Primary Passport Expiration, Redress Number, Known Traveler*

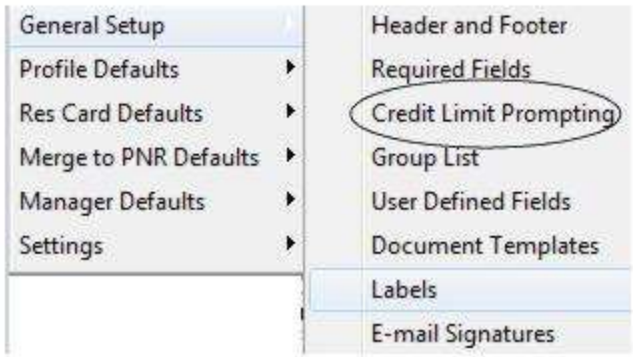
Number and Salutation/Nickname. After adding or editing a traveler record and clicking *OK*, prompting will occur if any of the required/optional fields are missing information.

Note: When using Required fields for Birthday Month, Birthday Day and Birthday Year:

**If Birthday Day is required or optional, the Birthday Month is set to Required.

**If Birthday Year is required or optional, the Birthday Month and Birthday Day will be set to Required.

**If Birthday Month is not Required, then both Birthday Day and Birthday Year will be cleared.



Credit Limit Prompting

This feature, when enabled, uses the *Trams Back Office* client profile field, *Credit Limit,* along with the client account balance to determine if a client has exceeded their Credit Limit and if so warns your front line agents accordingly and disables the ability to generate further invoices without a form of payment.

Disabled by default, *Credit Limit Prompting* can be enabled by going to **Global Defaults|General Setup|Credit Limit Prompting** and placing a check within *Enable checking and prompting when Credit Limit is Exceeded*.

HOW THIS FEATURE WORKS WHEN ENABLED

Upon opening a client profile that has exceeded its credit limit (account balance is greater than the credit limit entry in the *Trams Back Office* client profile), a warning appears notifying the User. This warning also appears when a Res Card is created or when Merge to PNR is selected for a client exceeding their credit limit.

The client Quick View screen has also been updated to include Credit Limit information if the client has a Credit Limit captured within its *Trams Back Office* profile. The Quick View screen includes the client's Credit Limit, Account Balance and Available Credit.

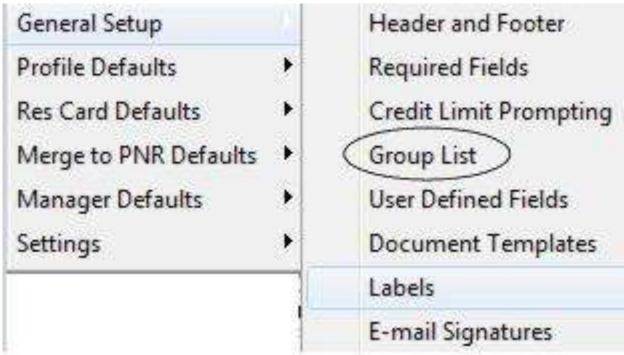
If a client has exceeded its credit limit, upon generating an invoice with no payment the system prompts *This account has exceeded its credit limit. OK* and does not allow the user to generate the invoice unless their advanced user permission settings (described below) allow for overriding this message.

ADVANCED USER PERMISSIONS RELATING TO CREDIT LIMITS

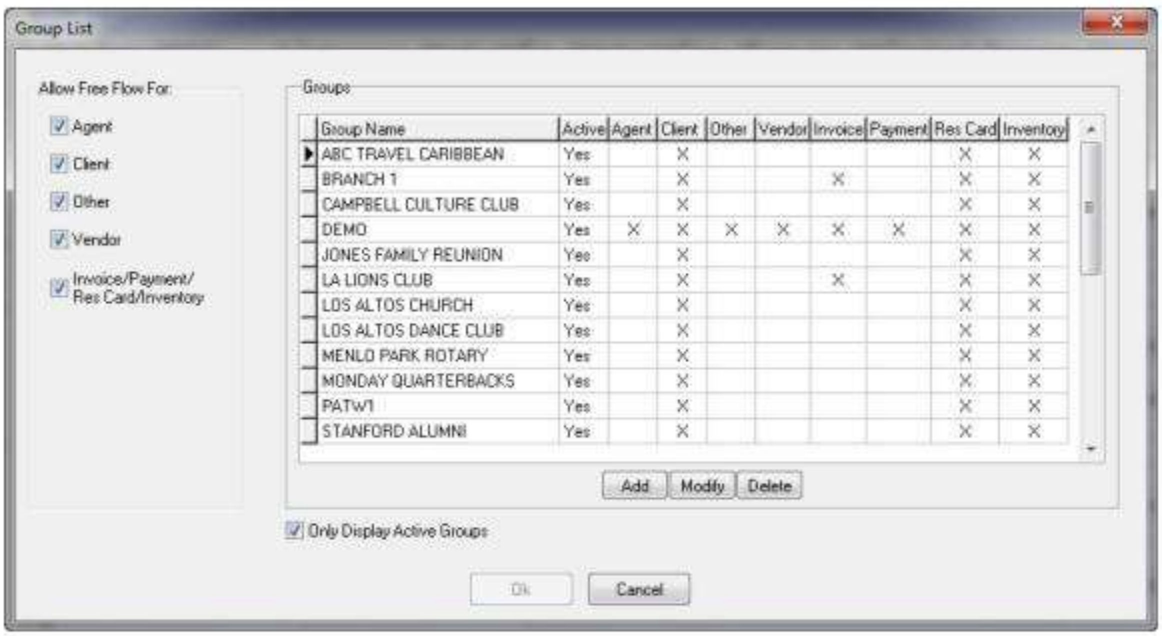
Two settings have been added to that Advanced User permissions area within the Other Permissions tab of a User Login including:

Disable Client Credit Limit, Balance and Available in QuickView and *Allow Invoice override for exceeding Client Credit Limit*.

Groups List



ClientBase has the ability to add group names to client, vendor, agent and other profiles, and to invoices, payments, res cards, and inventory. Since this is a table shared by *Trams Back Office* users, a change in here changes the TBO group table as well.



Click *Add* to add a new group name, and check off the drop-downs you want this group to appear on so you can tag entries.

Note: If a user adds a Group Name and a Group ID to the an inventory record, when an Inventory Group is viewed from the Group List, any associated Group IDs are listed under *Linked Inventory Group IDs*. (This field only displays if there are Group IDs linked.)

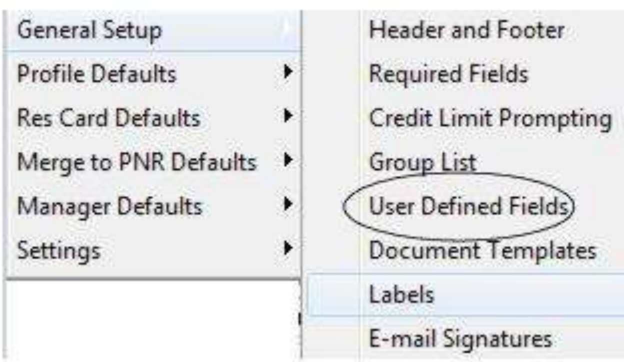
Click *Modify* to modify group names, and *Delete* to remove a group name. Checking or not checking the *Allow Free Flow* boxes either forces users to pull a group name from a default drop-down list, or allow users to free flow a group name into Client, Vendor, Agent and Other profile groups, as well as Invoice, Payment, Res Card, and Inventory groups.

Allow Free Flow for *Invoices/Payments/Res Card/Inventory* appear as one entry. If Allow Free Flow is checked for any one of the four it automatically checks all of them.

To inactivate a group name, so that users can clean up the group list, there is a checkbox entitled *Active*.

This box defaults to checked. When unchecked, the group is set to inactive and no longer displays on the group drop-down when selecting a group in a Profile, Res Card, or Inventory. Inactive groups are also not displayed in the drop-down on query screens; however, users can still query for inactive groups by typing the name in.

User-Defined Fields



User-Definable fields within *ClientBase* are easily identifiable by the blue underlined label next to the field. Clicking the blue label brings up a table to add, modify or delete customized lists. This drop-down customized list can also be globally added, modified and deleted from the **Global Defaults|General Setup|User-Defined Fields.**

Many defaults have been set up for your use. If you do not want agents to free flow data into these fields, uncheck the *Allow Free Flow* box.

The following User- Defined drop-down fields dynamically expand to the width of the longest entry:

General Info: Branch

General Info: Special Dates *Type*

General Info: Referred By

Res Card: Reservation Cycle

Res Card: Marketing Source

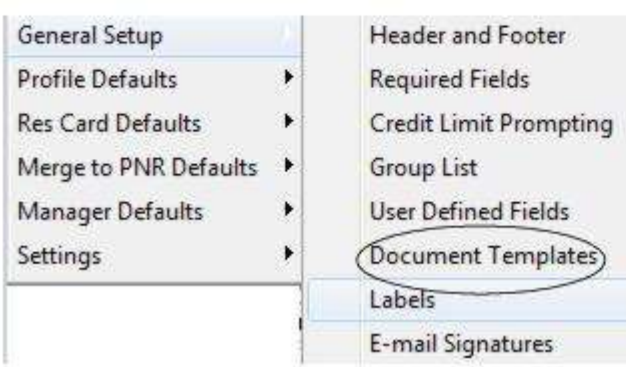
Res Card: Group

Res Card: Region

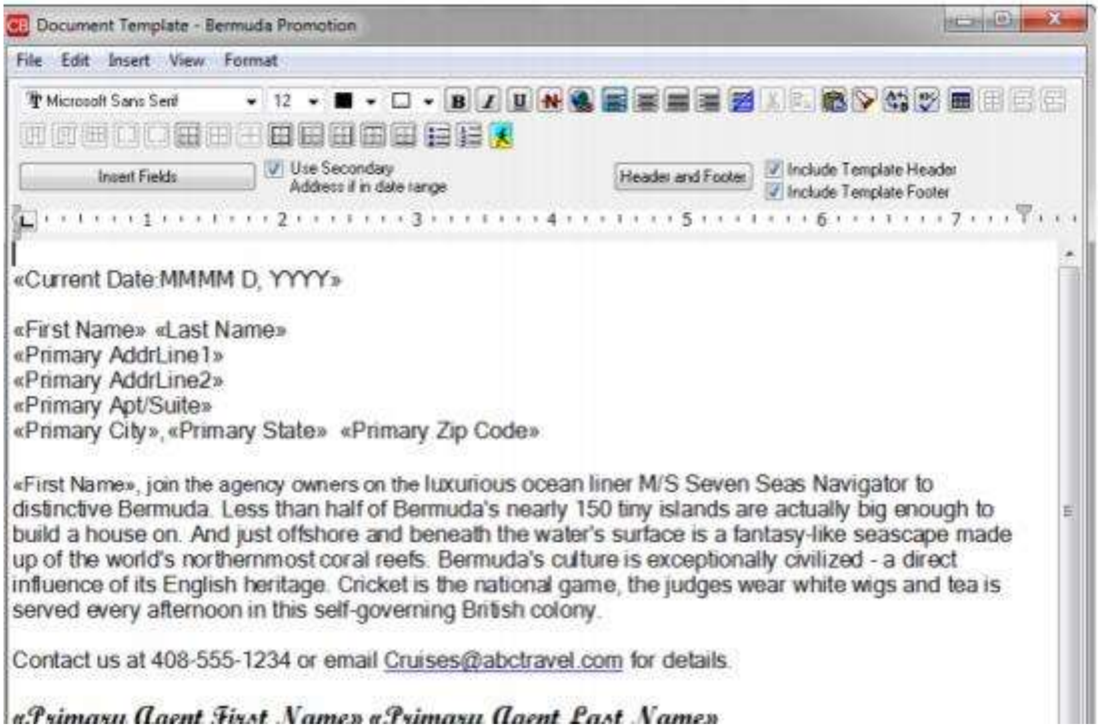
This makes it easier to select items from your drop-down lists that exceed the length of the field as it is displayed by allowing you to see the full entry without cutting it off.

Hint: A good way to modify user-defined fields, is just to start using the program with your own user login (granted with full access), and as you see a user-defined field item that needs to be added, modified, or delete, double-click the blue label to do these "on the fly". Also be careful not to give this permission to everyone or to allow *free flow*, as you may start finding misspellings, duplicates, and inconsistencies that make the drop-downs unmanageable.

Document Templates

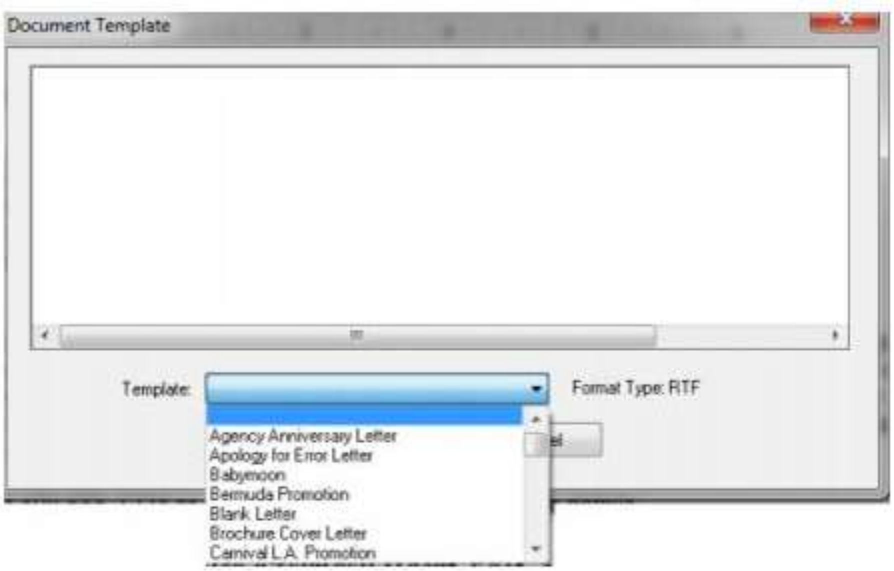


ClientBase includes the ability to write custom or form letters/e-mails and then easily merge those from within a profile or from the results of a Profile Manager Query. These documents are quickly produced by using document templates. There are some default document templates that you need to customize before you use them. To help you setup global templates in your agency, a template editor is included under **Global Defaults|General Setup|Document Templates**. This allows you to easily modify existing document templates, add new ones, or delete document templates.

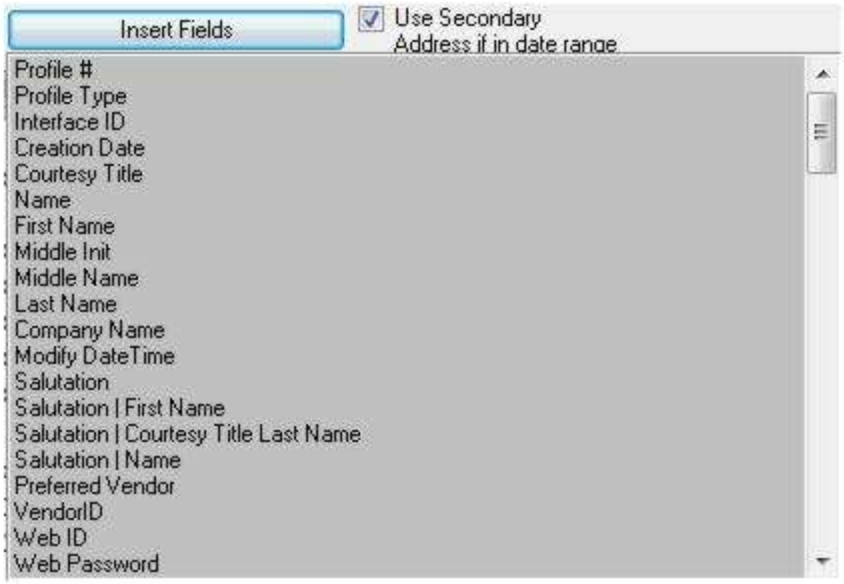


MODIFYING DOCUMENT TEMPLATES

Retrieve the document template by clicking **File|Load**, then load the template from within the *Template Editor*. From the list of templates displayed, select the desired template from the drop-down menu and click *OK.*



Once the template has been loaded, make your changes to both the text and the merge fields. There are some word processing features included for your use. Merge fields are the fields in the document surrounded by chevrons, such as <<ProfSalutation>>. When the document template is selected from within a profile or from the results of a profile Query, this merge field is replaced with the entry included in the salutation field of the profile. Click *Insert Fields* to pick from a list of merge fields.



To remove merge fields, highlight them and press the *Delete* key on the keyboard. To insert new merge fields, place your cursor in the desired location and click *Insert Field*. A list of the various profile fields available for selection is displayed. Click the field to insert into your template. The merge fields *Salutation|First Name* and *Salutation|Courtesy Title Last Name* use the profile's salutation field within a document template and if blank, then uses either the *First Name* or the *Courtesy Title Last Name* instead.

Tip: If you select **Salutation|Courtesy Title Last Name** or **Salutation|First Name**, or **Salutation|Name** as a merge field, the **|** character included in the Salutation means that if the Salutation field is not completed within one of the resulting profiles, then for just that profile, you want it to use the merge field following the **|**.

Margin Modification: To modify page settings in the document template, click **File|Page Setup** to select paper size, orientation, and customize margins:

Once all changes are complete, click **File|Save**. If you want to save the changes made to the template in a new template (so the old template remains unchanged), click **File|Save As** and assign your template a unique name. Close the existing template by clicking **File|Close** and load the next template to be modified.

Note: *ClientBase* comes with many default templates. We suggest you review the text and customize each of these default templates reflecting your agency name and signature line before use.

CREATING NEW DOCUMENT TEMPLATES

A blank template is provided upon loading the template editor. With the blank template on your screen, enter the text and insert the merge fields. When completed, click ***File|Save As*** and name the template. All templates are automatically stored in *ClientBase* so a path to the file name is not necessary, just the filename. Each template's name is limited to 40 characters and should easily identify the type of letter.

A quick way to create a new document is to take an existing template, save it with a new name using the **File|Save As**, and then modify with new text/fields. Another time saver!

DELETING DOCUMENT TEMPLATES

To delete a document template, go **File|Load**. Once inside the template, go to **File|Delete**. You are prompted with *Delete this [*Name of Template*]?*; click *Yes* to delete. Remember all document templates are global, meaning they appear on every workstation in every profile. Deleting a document template removes the template from all workstations.

WORKING WITH TEMPLATE HEADERS/FOOTERS

The global header/footer provides the ability to include common information such as agency or branch address and phone information in document templates - without having to re-create the information for every template. It accomplishes this by the use of Merge Fields. There is one default global header and footer. Every template can either use the global header and/or footer*;* or use its own unique header/footer loaded into the document template. A global template header/footer is created in *ClientBase* by going to **Global Defaults|Header and Footer|Document Templates** (see directions on creation above); and is loaded into the document template by default if you have check off the boxes, *Include Header* or *Include*

Footer. A unique header and footer can be created for a document template, by clicking *Header/Footer* and inserting a logo, graphic, text and merge fields into the header or footer areas as outlined above.

Note: To conserve disk space, we strongly recommend that any graphic files inserted into the global header are under 300 kb. When document templates are launched from the results of a profile Query, one document is created for each result. Therefore, if you run a Query that includes several hundred results, several hundred documents are created. If each document includes a large graphic file within the header, disk space may become an issue.

SPELL CHECK

Several dictionaries have automatically been installed onto each workstation running *ClientBase* providing you with the ability to identify misspellings within Document Templates. By default, while typing within the Document Template, the spell check feature automatically underlines each misspelled word. Right-click on a misspelled word and you will be offered suggested spellings along with the ability to *Ignore, Ignore All* or *Add* to Dictionary. In addition a Spell Check button, labeled *ABC* has been added to the toolbar of the document templates allowing you to run the spell check routine across all data captured.

CUSTOMIZING SPELL CHECK UTILITY

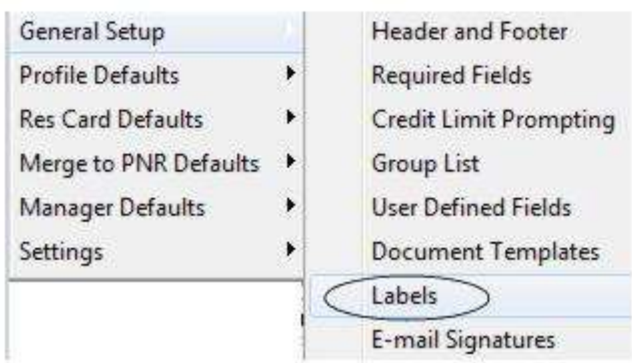
Although the spell check utility is automatically activated within Document Templates, Merge to E-mail and Profile Remarks, you can customize your spell check settings by going to **Workstation Defaults|Spell Checker**.

Dictionaries: Several different language dictionaries have automatically been installed, although by default only the General English dictionary as been enabled. From this area, *Add, Enable, Disable* or *Remove* dictionaries. **Note:** All dictionaries have been installed within the **My Documents*Trams*\Dictionary directory**.

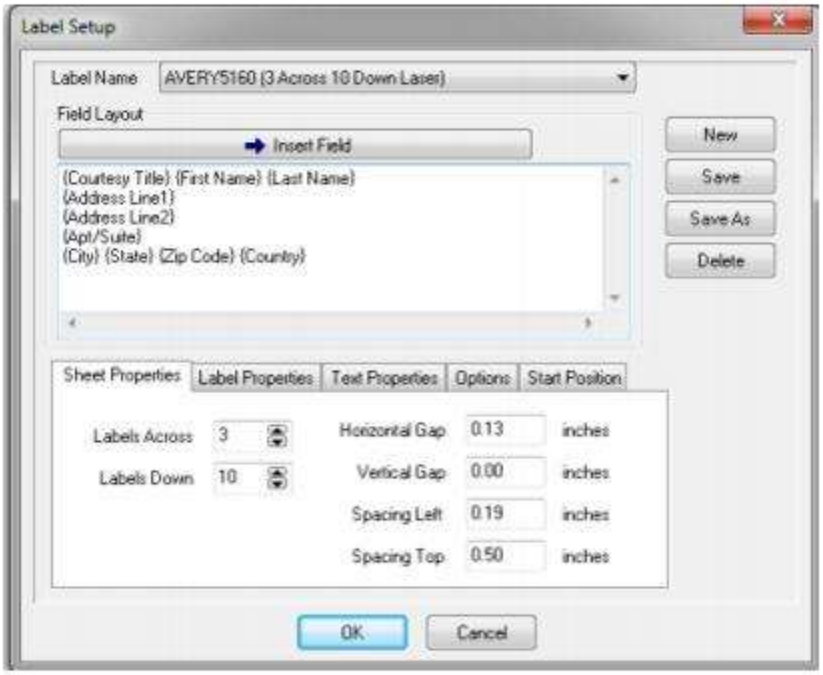
User Dictionaries: A blank user dictionary is also automatically installed where you can customize the dictionaries used when running spell check to include words not currently in the General Dictionaries. When running spell checker if a word not recognized is *added to dictionary*, the word is saved within this *User Directory*.

Options: By default the spell checker is set to *Ignore ALL CAP words*, *Ignore Words with Numbers*, and *Highlight misspelled words*. Remove the check from these settings to change the default.

Labels



Go to **Global Defaults|General Setup|Labels**, to setup label formats. These formats can be edited when you merge to labels in *ClientBase*.



New: Click *New* to create a new label format.

Save: After you have modified a particular format, click Save.

Save As: If you have modified an existing label format, click *Save As* to save it under a new name.

Delete: If you want to remove a label format, click *Delete*. You cannot delete default Avery label settings.

SHEET PROPERTIES

Label Name: By choosing from the drop-down menu, choose a label default Avery. These default labels cannot be deleted, so click *Save As* and name the label something like *Default Label.* (If you are creating labels to be sent to travelers on birthday cards or passport expiration letters, create a *traveler Label* as well, with Family/Contact name fields selected.) Select the fields (include any punctuation) to include on the label. These fields are located in the *Field Layout* area. **Tip:** If you select **Salutation|Courtesy Title Last Name** or **Salutation|First Name**, or **Salutation|Name** as a merge field, the **|** character included in the Salutation means that if the Salutation field is not completed within one of the resulting profiles, then for just that profile, you want it to use the merge field following the **|**.

Create as many different types of labels agents will be using by using *Save As*. That way the next time labels are needed, you can select a saved label without having to set up the format all over again.

Field Layout: There are default label layouts for the preset labels, but if you want to change how the label looks or create a brand new one, scroll down to choose any of the available fields and bring them over into “Label Layout” screen by clicking the **->** right arrow.

LABEL PROPERTIES

These are also default fields when you choose a standardized label that can be modified or used to format a custom label.

Number of Copies: When printing labels, enter the desired number of copies here.

TEXT PROPERTIES

Click the **A** to the right of the font screen, to change the font style, size and color:

OPTIONS

There are several fields to customize labels even further: *Don't Print Blank Labels, Print Zipcode Bar Code, Set as Default, Use Upper Case,* and a *Use Address field.* (These choices are available at the time of printing.)

START POSITION

If some of the labels on a sheet have been used previously, indicate the start position to print out the label (this of course is done at time of printing). Choose the column and row fields, or click *Select Pos* to click the exact label location.

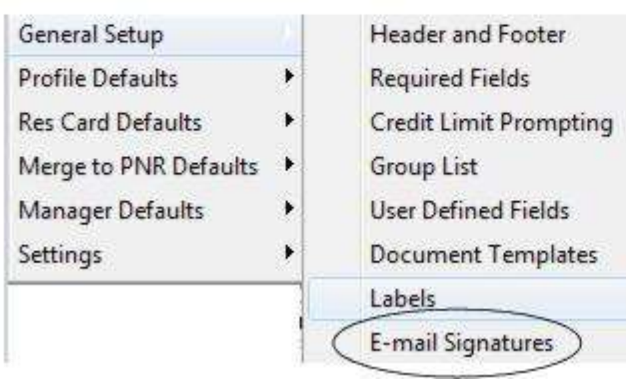
Setting Up Envelopes

Use the label setup area to customize envelopes. To print envelopes vertically from your printer, modify the Avery 4150 (1 Across CoStar) driver defaults to create a unique envelope setting by inserting the measurements of your envelope, and "Save As" *Envelope*. This Avery 4150 setting accommodates vertical printing. There are no vertical or horizonal gaps in an envelope setting, so set these to 0.00, and you need to measure in inches where you want printing to start from the left and from the top and put these measurements in *Left Spacing* and *Top Space.* Hold the envelope vertically. In the *Label Properties* tab, insert the envelope's width and length in inches and select *Rectangle* from *Label Shape* drop-down menu.

If you print envelopes horizonally, create a unique envelope setting by selecting any horizonal label default, measuring the dimensions of your envelope (which acts as one big label), inserting these measurements as directed above, and "Save As" *Envelope*.

Note: The Avery 4150 (1 Across CoStar) is a small label printer you can purchase at any office supply store. You may want to include this printer on your network as it prints single labels vertically and helps you avoid common pitfalls which may occur when using full label sheets.

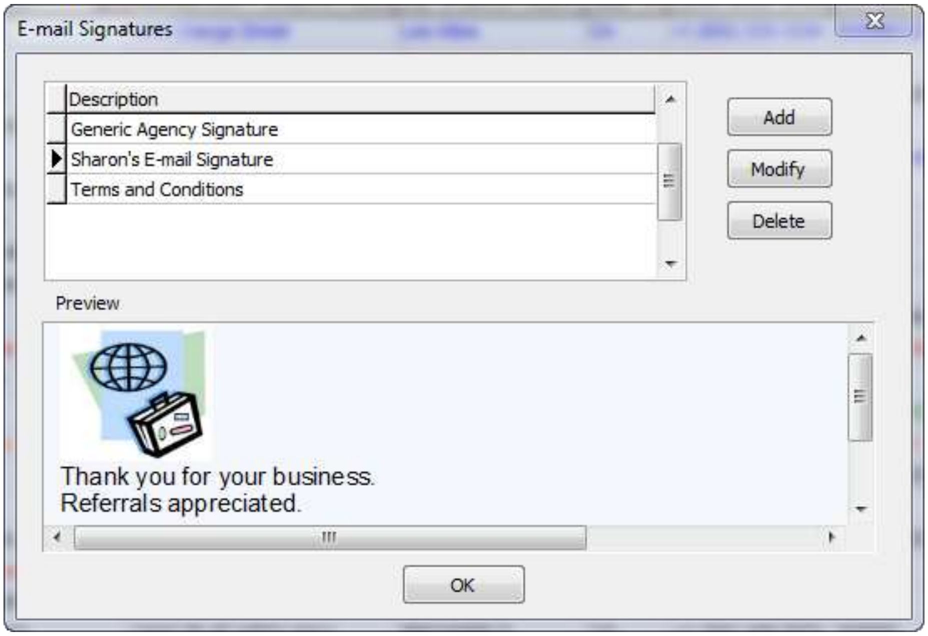
E-mail Signatures



Users can create e-mail signatures for use with the *ClientBase Merge to E-mail* feature. A global set of e-mail signatures can be created using formatted text, user login and agent merge fields and graphics. Each user login can link to one of these global e-mail signatures to set as that user's default signature. Upon launching Merge to E-mail, the system automatically launches the current user's default signature or the user can select one from the drop-down list.

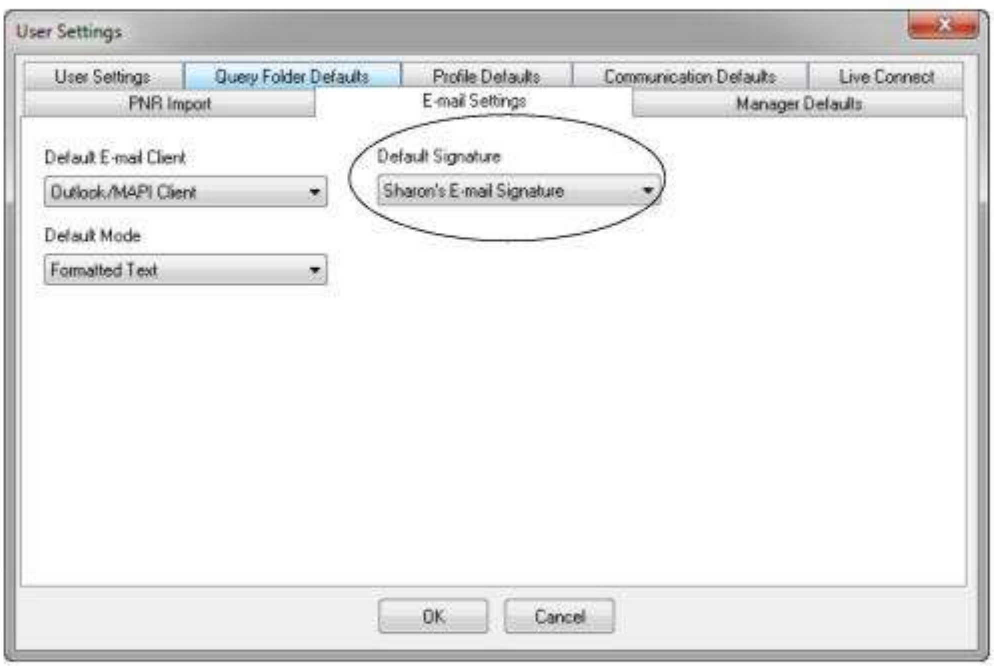
Setting Up E-mail Signatures

Go to **Global Defaults|General Setup|E-mail Signatures** and click *Add.*



Enter a brief description for the signature. Next, create an e-mail signature using formatted text and merge fields. If desired, use the blue and yellow button (with a picture of a person) to insert a graphic file. Click *OK* to save and repeat these steps to create multiple e-mail signatures.

Upon creating your global e-mail signatures, have each user go to **Utilities|My Login** and click the E-mail settings tab to select a default e-mail signature for each User.



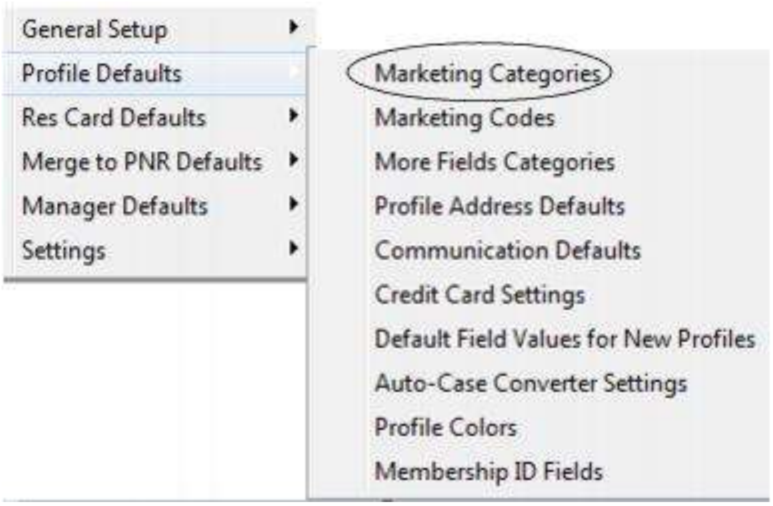
USING E-MAIL SIGNATURES FROM MERGE TO E-MAIL

Upon launching *Merge to E-mail*, click the Signature tab to view the default e-mail signature based on the current login and setup established above. Override the default signature or enter a unique signature directly from this tab if desired. Click the drop-down listing next to the field called *Signature* to select from your default signatures setup in Global Defaults. Override any of these defaults by typing within the Signature area.

Global Defaults Profile Defaults

Global Default Profile Defaults settings regulate *Marketing Categories; Marketing Codes; More Field Categories; Address Defaults; Communication Defaults; Credit Card Settings; Default Field Values for New Profiles; Auto-Case Converter Settings; Profile Colors and Membership ID Fields.*

Marketing Categories



The Marketing Tables in a profile are used to identify each of your customer's unique travel preferences, interests and demographics, while at the same time, automatically grouping clients with common codes. Since qualifying a customer for a leisure vacation can be the most difficult part of selling leisure travel, access to this valuable information might just make the difference between closing a sale or losing it.

These marketing tables make it possible to consistently put the right product in front of the right client, by both your front-line agents and marketing programs geared towards generating travel interest. In addition, labels, letters and e-mails can be quickly created to link clients and travel preferences when a "hot" travel special lands on your desk. With a simple mouse click, every agent selects from the same list, and that means continuity among your clients and simplicity for your agents.

All customer profiles have a tab called *Marketing* which contain marketing tables. Some of these tables come with pre-defined default codes, but all of them can be customized to meet agency needs. There is no limit to the number of marketing tables that an agency can have; however, it is important to remember that for reporting purposes, it may become very difficult to see the true client traveling preferences if too many categories exist. For example, if you have both *ancient sites* and *archeological digs* as marketing categories, you might miss several clients who would be interested in a tour to an archeological dig if the report only includes clients from the *archeological sites* marketing category.

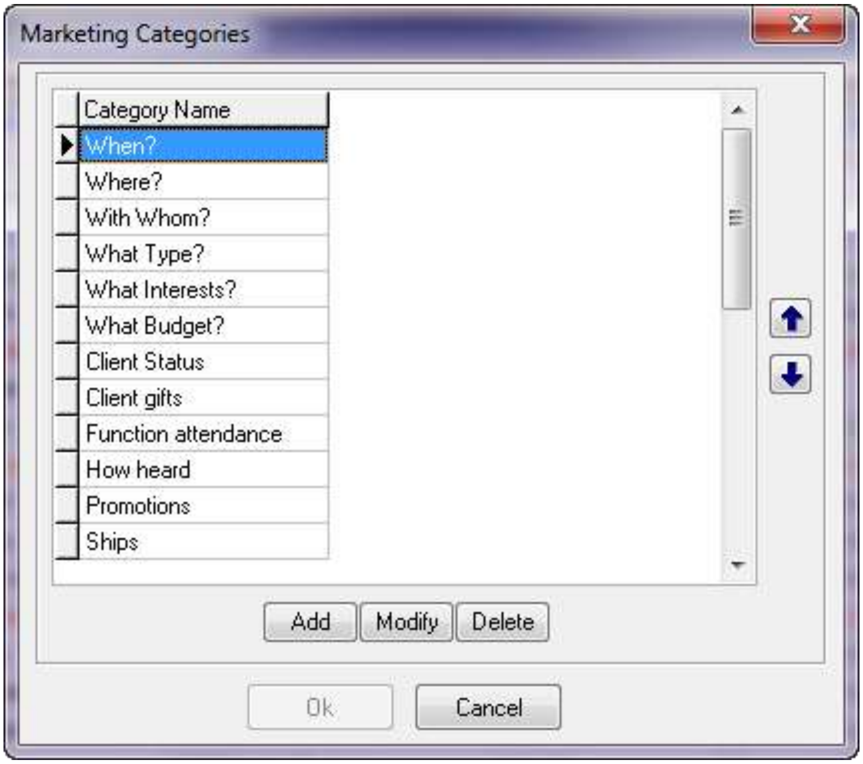
If you are a member of an agency consortium that has provided its own default market categories and codes within *ClientBase*, check with the consortium before making any changes to the defaults (or add your own tables and codes directly below the defaulted tables).

TAILORING THE GLOBAL LIST OF MARKETING CATEGORIES

1. Modify the name of a Marketing Category: Go to **Global Defaults|Profile Defaults|Marketing Categories**, highlight the marketing category, and click *Modify*. A dialog box prompts you for the category name. Enter the desired new category came and click *OK*.

2. Add a Marketing Category: To add a marketing category, click *Add*. Enter the new category name and click *OK.* Use the blue up and down arrows to reorder the categories. This sort order is reflected everywhere Marketing Categories are used -- in profiles, queries, reports, Global Modify, File | Export, and on the list of required fields.

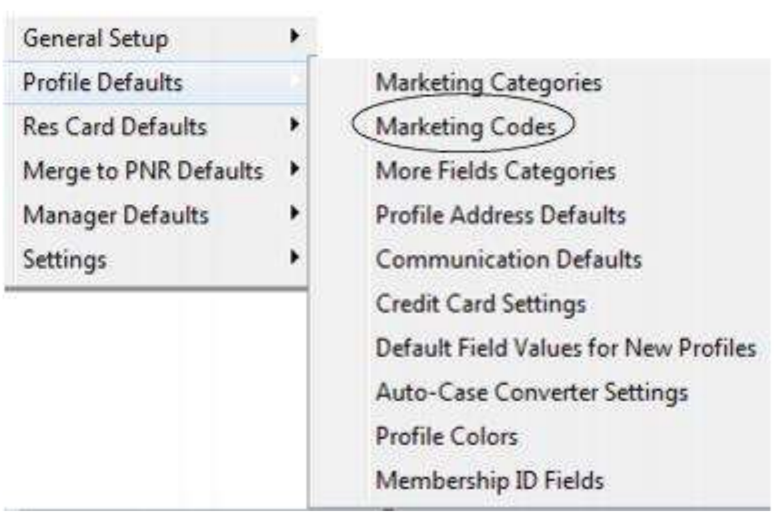
Reordering Marketing Categories can only be done on the primary database; the new order will sync out to any sync copies.



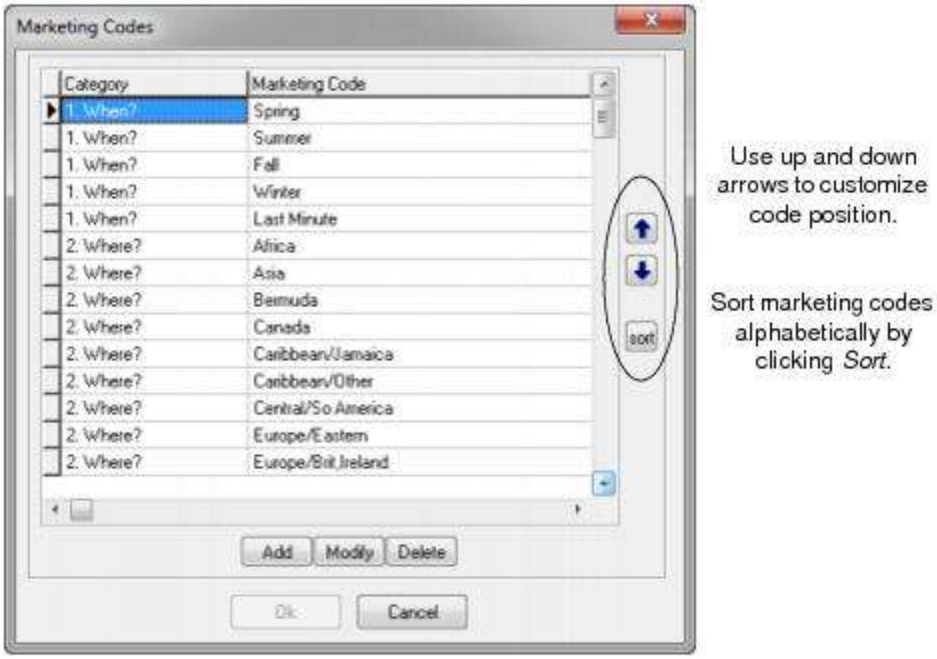
3. Delete a Marketing Category: To remove a marketing category, select the desired category and click *Delete*. A new user-definable marketing category assumes the numbered position of the deleted category.

Important Note on Deleting: The category cannot be deleted if there are any checked marketing codes attached to the category. A warning message appears advising you of the number of profiles with that marketing code attached. Any checked marketing codes have to be deleted from the marketing category before the category can be deleted. Do this by going to **Global Defaults|Profile Defaults|Marketing Codes**, and just simply deleting any marketing code associated with a marketing category. Now go back into the Marketing Category and this can now be deleted.

Marketing Codes



Default marketing codes come with each of the default marketing categories. These codes can be customized to meet the needs of each individual agency. To tailor the codes in any marketing category, go to **Global Defaults|Profile Defaults|Marketing Codes**. If you are a member of an agency consortium that has provided its own default market categories and codes within *ClientBase*, check with the consortium before making any changes to the defaults (or add your own tables and codes directly below the defaulted tables).



TAILORING MARKETING CODES

1. Add a Marketing Code: Click *Add*, select the appropriate marketing category by clicking the down arrow and selecting from the list, and then enter the desired code name in the field, *Marketing Item*. To customize the code position on the list, highlight the code, click the blue up and down arrows, and move it to its new location. Clicking *Sort* alphabetically sorts codes automatically.

Marketing Partner's ID: This field was designed for consortia, co-ops, franchises, etc. who are trying to collect marketing preference information from their members for consolidated marketing purposes. This allows each agency member to capture the Marketing Categories and Codes however they desire, but then enter a common ID provided by a marketing partner to allow for creating a constant set of marketing values across all members. This field need only be completed if you are participating in some consolidated marketing programs and are instructed to do so by your marketing partner and provided the necessary ID's. If a Marketing Partner ID is entered into any of the Marketing Codes, upon saving, you are prompted with a count for the number of profiles that have that code selected. Press *OK* to save the entry as this new ID does not affect any of your profiles or current reporting.

2. Modify a Marketing Code: Highlight the marketing code to edit and click Modify. Enter the desired code name in the field, Marketing Code. If any profiles have been coded with this item, the system prompts before saving. Any profiles loaded with this item remain coded with the new code name.

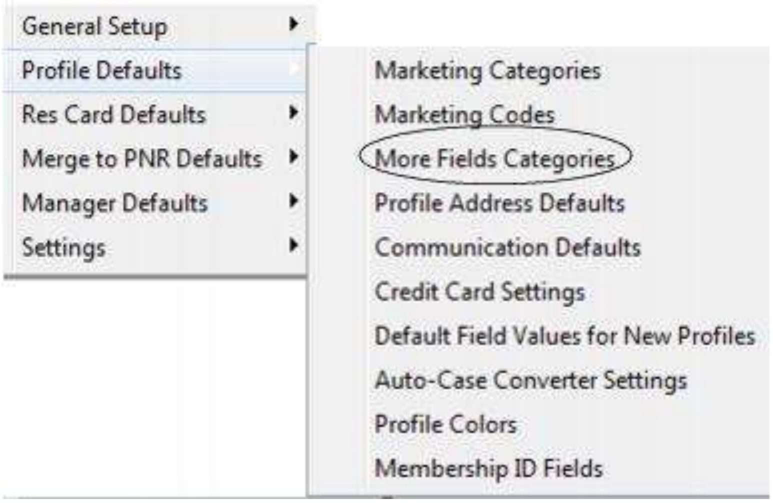
3. Delete a Marketing Code: Highlight the marketing code to remove, and click *Delete*. If any profiles have been coded with this item, the system prompts before deleting. Deleting a marketing code that profiles are using results in removing the code from those profiles.

4. Sort Marketing Codes: Sort marketing codes alphabetically within a particular marketing category by clicking *Sort*.

5. Move a Marketing Code From One Category to Another: Highlight the marketing code to move from one marketing category to another marketing category and *Modify.* Select the desired table from the drop-down list next to category. Use the up and down arrows to arrange the order of the code now in the new table.

Caution: When modifying or deleting a marketing code, the effect of this action is global. Each workstation and profile is also modified. For example, if you change a marketing code from *Scuba* to *Diver*, profiles no longer show *Scuba* as a marketing code option. When running a report to show all your scuba divers, *Diver* rather than *Scuba* now becomes the search field.

More Fields Categories



More Fields are available for further customizing *ClientBase* to your agency's needs. If you can't find a place in *ClientBase* to store information, create a field, and its drop-down menu items yourself. Perhaps you want to create a pull-down menu for special services such as "meet and greet" or "wheelchair assist." Social security numbers or driver's license numbers can be stored here or any other information that does not fit into one of the other pre-designed fields.

Fields stored in the More Fields tab include a field name and an optional drop-down list of defaults entries. More field categories is where to assign a field name.

Category Name: Enter a title for this more field.

Format Type: Specify what characters are entered into the field: *None (More Fields will continue to work as it does currently); Letters Only; Numbers Only or Letters and Numbers Only.*

A different format option can be selected for each Profile More Field. A field length can also be set for a More Field by entering the number of characters allowed in the Max Length field. Maximum number of characters for a More Field is 80 characters. The new formatting options can only be used when adding new Profile More Field categories. Existing Profile More Field categories cannot be formatted.

When a Profile More field is formatted, when entering a value for the More Field, the value can only be entered using the format designated for that category. If an incorrect value is entered a message is displayed informing you of the proper format. So if the More Field was formatted to accept numbers only and an alpha character is entered into the field, the message would appear, "Invalid Entry. Format Type is Numbers Only."

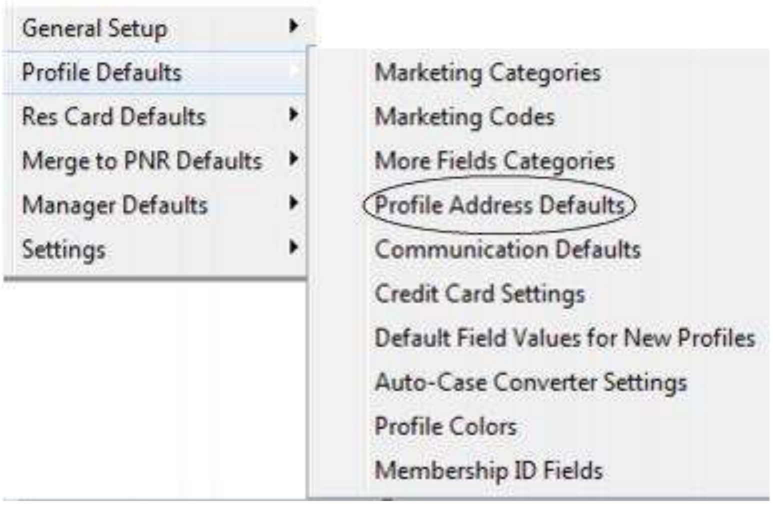
(The same format options are available with Res Cards More Fields. When linking a Profile More Field to a Res Card More Field, the two must be in the same format. For example, if Profile More Field is in Letters Only format, then the Res Card More Field linked to it must be in Letters Only format as well.)

Note: The *Format Options* menu is read only for sync copies.

User-Defined Fields|More Field Items is where to create the drop-down list of defaults.

Hint: Use a marketing table/code or group name instead of a more field to track temporary information because these much easier to delete by using the Global Modify utility.

Profile Address Defaults

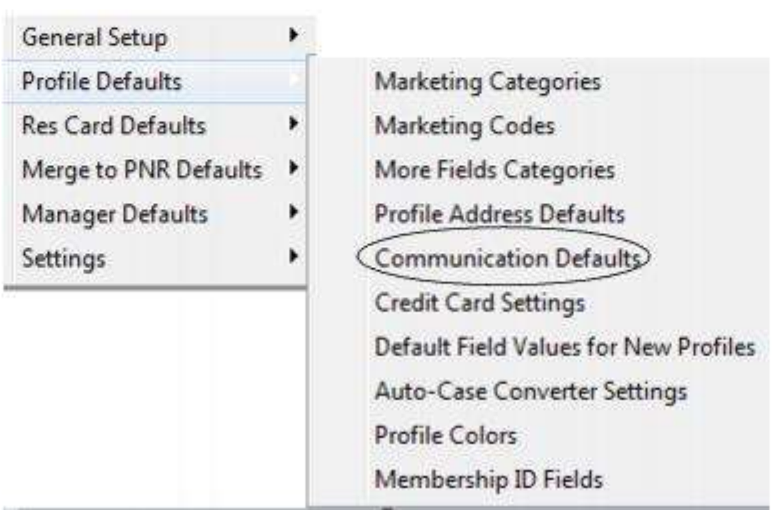


Set the Marketing Permission setting at the Profile Address level. Each profile address has a checkbox setting called *Allow Marketing Permission*. To change the default for new profiles or new addresses, go to **Global Defaults|Profile Defaults|Address Defaults** and change it from *Allow Marketing Permission (checked)* to *Not allow Marketing Permission (unchecked)*.

Level 2 and Level 3 Profile Manager Queries have been updated so that queries can be filtered based on this marketing permission setting. The Merge to Label, Merge to Letter, Merge to File, Merge to File Handoff, and File Export features have also been updated to include the ability the ability to filter out profiles without marketing permission by including a checkbox setting called Include Only Addresses with Marketing Permission Checked.

Clients who have requested to be removed from a mailing list can now be excluded by unchecking this *Allow Marketing Permission* setting at the address record level.

Communication Defaults



All profiles in *ClientBase* contain a communications table in the general information tab. Each communication entry includes a *type* which can be *Phone, Fax, E-mail* or *Web Site*. Each type allows for an unlimited number of entries, but only one “primary” entry for each. Phone and fax type entries include a country code, area code, prefix and suffix. (**Note:** Country code, area code, and communication descriptions can be overwritten in the *User Settings Communication Default* tab under **Utilities|My Login,** or by the SYSDBA in the **Utilities|User Logins**.)

Enter the desired default country code and area code here in the communications default (see below for non-North America country codes and area codes). Once completed, if a phone or fax number is entered without a country code or area code, these defaults are filled in automatically. In addition, each communication entry includes a description field, and a default entry can be captured here for each communication type. You can also default for each setting whether you want the *Include Marketing Permission Setting* to be visible for each communication type, and set a default of checked or uncheck for this type (except for *Website)*.

SETUP IF DEFAULT COUNTRY CODE IS NOT 1

Default logic looks at User and/or Global communication defaults for Country Code and Area Code and uses additional logic for defaulting the Country Code and Area Code in the phone format window under these conditions:

**If the number entered into the phone field does not start with both a country code and area code, the digits entered default into the entry field and the User or Global communication default populates the Country/Area Code. Example: If User/Global communication default is 63 for the Country Code and 9 for the Area Code, a new phone number entered as 5551212 is saved as +63 (9) 5551212.

**If the number entered into the phone field does not start with a country code, but does start with an Area Code, the area code lands in the area code section, remaining digits land into entry field and the User or Global communication default populates the Country Code. Example: If User/Global communication default is 63 for the Country Code, a new phone number entered as 95551212 is saved as +63 (9) 5551212.

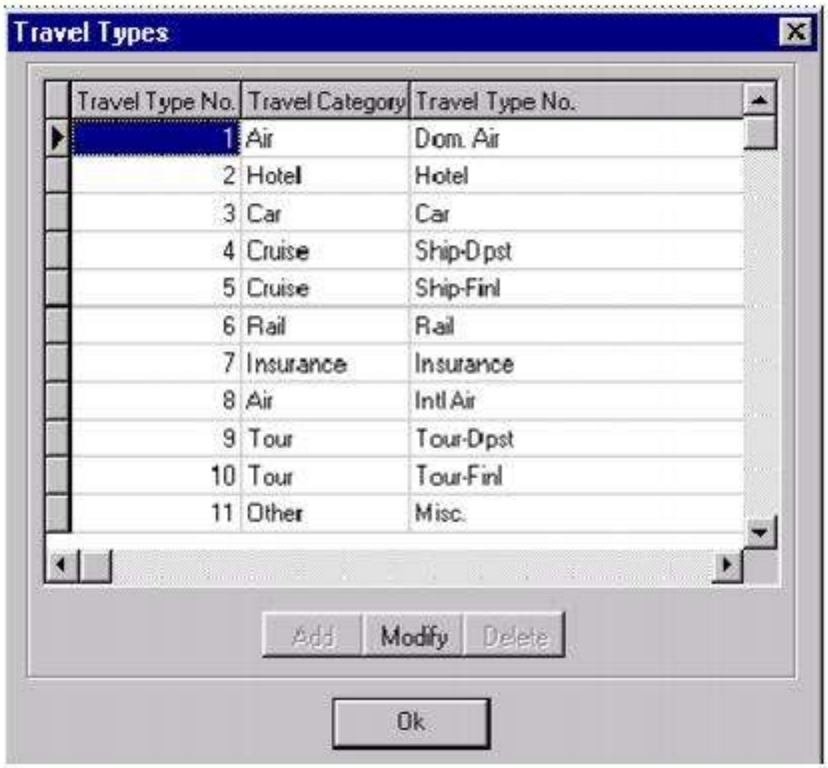
**If the number entered into the phone field starts with same numbers in the User or Global communication defaults, then the number is parsed out accordingly into Country Code, Area Code and Entry. Example: If User/Global communication default is 63 for the Country Code and 9 for the Area Code, a new phone number entered as 6395551212 is saved as +63 (9) 5551212.

**If phone entry does not start with "1" a dash is not entered in the entry.

Travel Types (Feature found if you have *ClientBase* ONLY)

ClientBase has added the ability to format Res Card invoice data within a PNR Rule so that agencies **NOT** using *Trams Back Office* (TBO) can print invoices from *ClientBase*, then send the invoice data to a PNR in the form of accounting lines that can be interfaced to a back office accounting system (see *An In-depth Look at Res Cards* for complete steps). However, customize the *Invoice Travel Types* to correspond to those in your accounting system. *ClientBase* comes with 25 default Travel Types. **Note:** For agencies using *Trams Back Office*, you won't be seeing Travel Types as these are edited in TBO, rather than *ClientBase* as links to General Ledger accounts exist.

To edit those defaults:



1) Go to **Global Defaults|Profile Defaults|Travel Types**. Here, you can modify each of the default types.

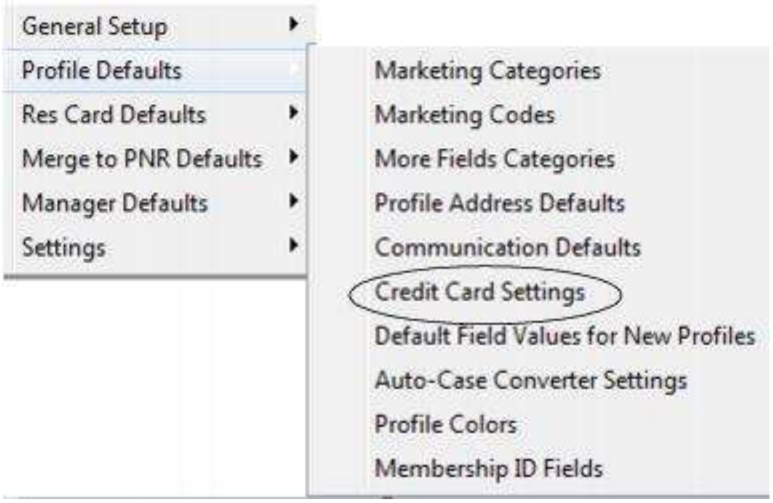
2) Select the travel type edit and click *Modify.* Travel types are user-defined and used upon invoicing to designate the type of travel the invoice is being generated for. Travel type is a merge field available for use when setting up your PNR Rules.

3) Type the name of the new travel type.

4) Under travel category from the drop-down menu, link this travel type to the appropriate travel category. Travel categories are pre-defined (*Air, Hotel, Car, Cruise, Tour, Rail, Transportation, Insurance, Service Fee & Other)* and used to categorize each reservation captured in *ClientBase*.

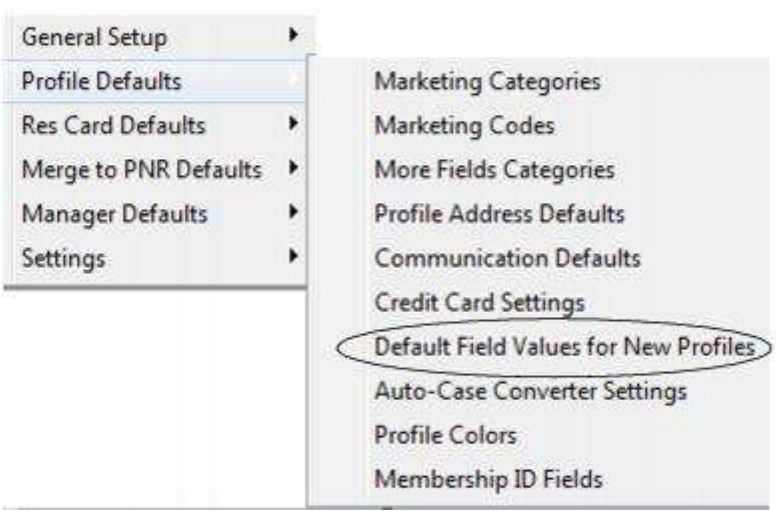
5) Click *OK*.

Credit Card Settings

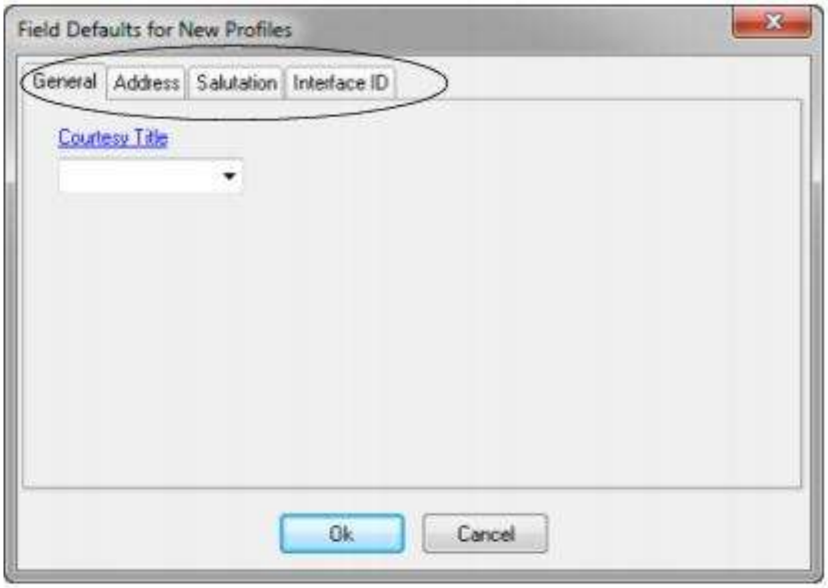


This menu option gives you the ability to disable as well as clear the Credit Card field called *Security Code* located within the Profile Cards tab. Recent credit card policies strongly discourage businesses from storing a credit card security code within any kind of database. As a result of this policy, we have defaulted this setting to disabled upon installing this update. Although discouraged, if you would like to re-enable this field, then go to **Global Defaults|Profile Defaults|Credit Card Settings** and place a check next to *Enabled*. To clear all existing Security Code field entries from all existing Credit Card records within your database, click *Clear All Credit Card Security Codes*. Running this process permanently removes all credit card security codes from your database.

Default Field Values for New Profiles



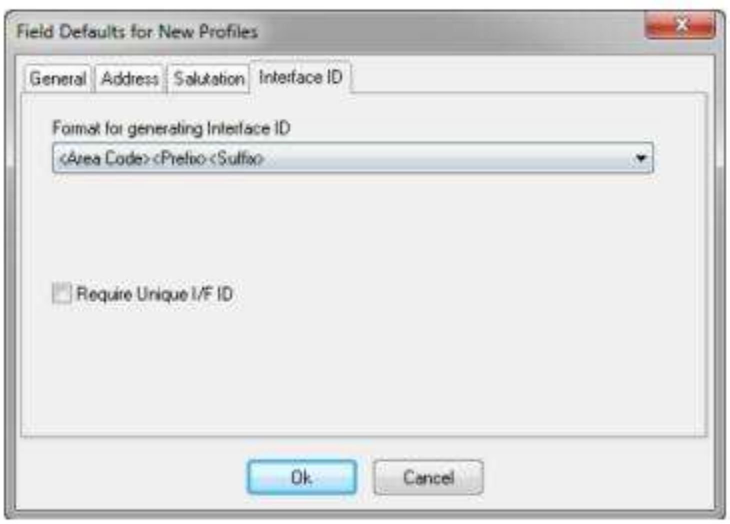
Assign default field values to certain fields when a new profile is created. The following fields can be assigned a default value with this new feature: *Courtesy Title, Zip Code, City, State, Country, Salutation* and *Interface ID.*



Assign default field values to certain fields when a new profile is created: General, Address, Salutation; and Interface ID tabs.

Tip: <u>Careful when using auto-filled fields. Since the user see it's already filled in with data, these may be overlooked and not correctly updated.</u>

In the Interface ID tab, choose from the drop-down menu a format for generating the default Interface ID.



Use:

<Area Code><Prefix><Suffix> or

<Last Name><First Name><Agent Name> or

<PROFILENO> or

<GENERATOR> with starting number set by agency, therefore allowing for sequential Interface ID numbering to go as high as 9,999,999,999, or

<MASK>: The Interface ID you are generating in *ClientBase* can be based on the *Full Name field, First Name field, Last Name field, the Residential Phone field*, or a combination of the all those fields (from 1-10 alpha-numeric characters). N uses a character from the name field, F uses a character from the first name field, L uses a character from the last name field, and a digit uses that position from the residential phone field (0 signifies the 10th digit of the phone number). Select a sample mask from the drop-down menu or create any mask that you desire. We recommend using the Interface ID mask of NNN4567890 which uses the first 3 letters of the client's last name, and the last 7 digits of the client's phone number. (If no phone number exists, an Interface ID is generated with just the first 3 characters of the client's last name.)

Sample Masks:

Mask Name field Phone field InterfaceID

NNN4567890 MEYER/SHARON +1 (310) 641-8726 MEY6418726

NNNNNNNNNN ROSEN/LEE +1 (310) 641-8726 ROSENLEE

N6N7N8N9N0 PALLEY/DAN +1 (310) 641-8726 P1A8L7L2E6

FFFF-LLLLL SMITH/JANE +1 (310) 555-1234 JANE-SMITH

NN-4567890 SMITH/JOHN +1 (310) 987-6543 SM-9876543

Note: Characters from the name, first name, and last name fields are taken from left to right. Slashes and spaces are skipped. Any characters that is not an "N", not an "F", not an "L", and not a digit from "0" to "9" are treated as a constant. See last two samples above where "-" is in the mask.

The Salutation can be automatically assigned to new profiles by clicking the salutation tab and choosing off the drop-down menu:

<FirstName> or

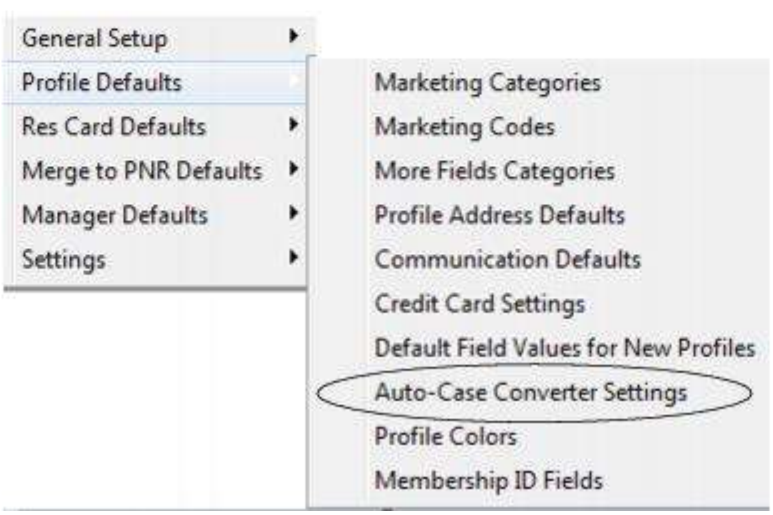
<FirstName><LastName> or

<CourtesyTitle> <Last Name> or

<CourtesyTitle> <FirstName> <LastName>

Require Unique, Non Blank I/F ID On New Profiles: If this box is checked, you will NOT be able to create a "New" profile if the Interface ID field of the profile being created is an Interface ID that has already been used for an existing profile in the system.

Auto Case-Converter Settings



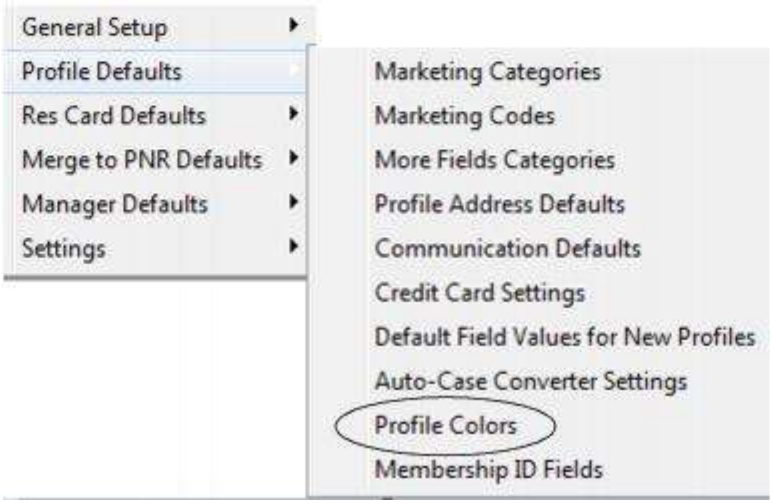
Within this area a listing of the following profile fields is available for automatic case handling: *Company Name, First Name, Last Name, Courtesy Title, Address 1, Address 2, Apt/Suite, City, Country, Traveler First Name, Traveler Last Name, Traveler Courtesy Title,* and *Traveler Relationship/Title.*

By placing a check into any of these fields, as you are working within *ClientBase* profiles, the first letter of each word entered is automatically capitalized and the remaining letters are automatically set to lower case.

To **override** the system's automatic case handling for entries such as McLeod or NE (where the auto case handling reverts to Mcleod and Ne), tab past the field then move back into it (by using <Shift><Tab>), as the automatic case handling is turned off for a field once entries exist within it. Another option is to enter McLeod as Mc Leod and NE as N.E., since spaces and punctuation allow for capitalization.

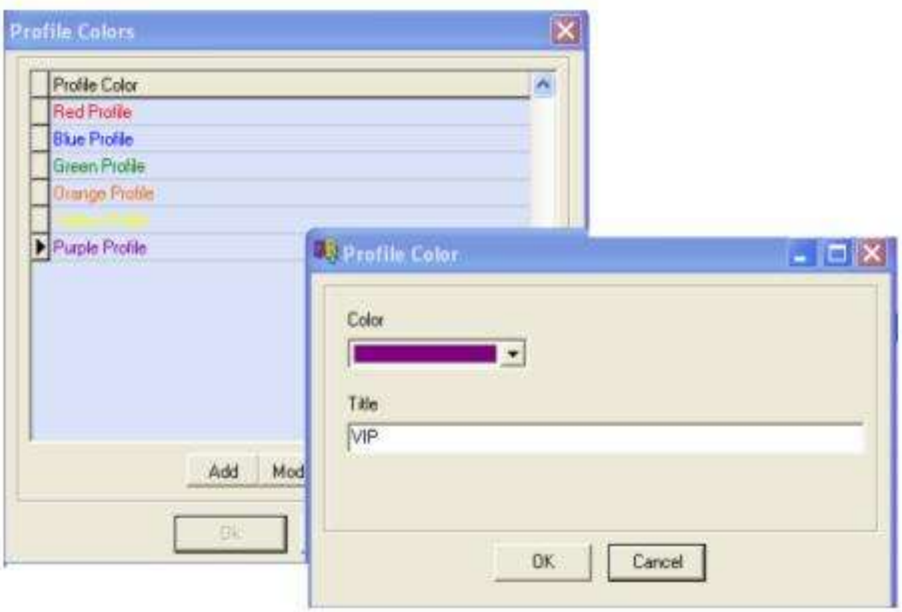
Tip: If you have many profiles that have already been created by solid caps or all lower case letters, use the *Case Converter* in Utilities to convert **these first before setting this up.**

Profile Colors



You have the ability to set a *font color* to a Profile Header to differentiate types of clients (i.e. VIPs, Prospects, etc.). The color assigned to a profile appears in the Profile Header when viewing a profile, as well as in the results of a Query.

Select **Global Defaults|Profile Defaults|Profile Colors** to set up the color key by adding, modifying or deleting colors and their types.



For example, set "Color" to Purple with a "Title" of VIP.

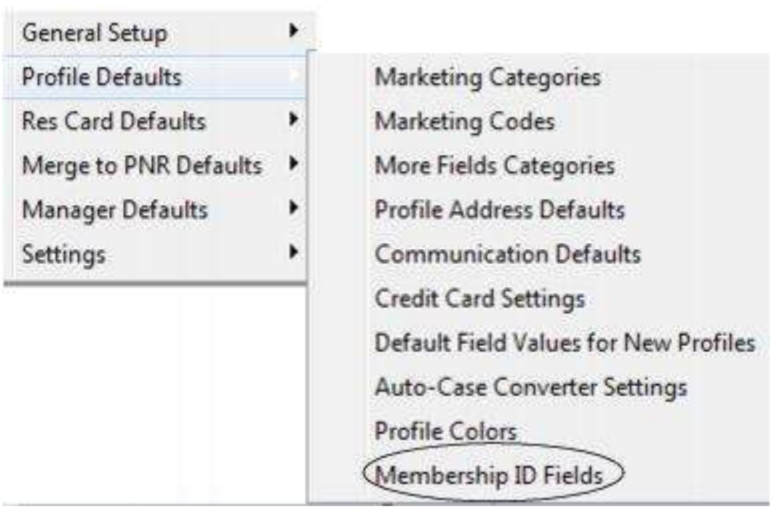
Profiles are set to the color blue by default. When in a profile, right-mouse click in the profile header to reclassify the client to the appropriate color option.

Right-mouse click in the profile header to change or remove a profile color.

Want to change multiple profiles to the appropriate color option? Query and select the profiles that fit a certain color type, then Global Modify changing the *Field To Modify* as *PROFILE.Profile Color* and *Set Value* to the color of choice.

Note: Profiles can be queried by Profile Color. There's a query filter *Profile Color* in the General Info Tab of Level 2 and Level 3 Profile queries. Query filter has a drop-down list of Profile colors from the Profile Color Global Defaults with check boxes to select color(s) desired. Level 3 Query filter also includes the search operators *Is Equal To Any, Is Not Equal To Any, Is Blank and Is Not Blank*.

Membership ID Fields



Two fields, *Membership ID and Associate ID* are available in Leisure and Corporate profiles if setup. The *Membership ID* is used at the **profile level** to capture any special identification number assigned by the agency to the customer account. The *Associate ID* is used at the **traveler level** to capture any special identification number assigned by the agency to the traveler.

Setup:

Select **Global Defaults|Profile Defaults|Membership ID Fields** and check the boxes *Display Associate ID* and/or *Membership ID.* Next click the drop-down for the *Format Type* and choose a format for the field. Options are:

**None (No rules apply. Field can have spaces, special characters, letters or numbers.)

**Letters and Numbers Only

**Letters Only

**Numbers Only

Next, enter into the *Max Length* field how many characters the field length should be. Maximum character length is 80 characters. Click *OK* to save.

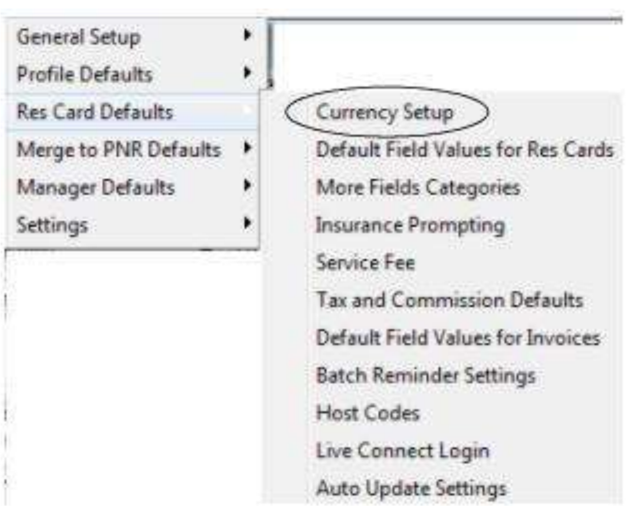
Once set up is complete, add the Associate to each traveler that was assigned an ID. The Associate ID field is located in the profile under Traveler/Contact tab under General Info.

The Membership ID and Associate ID field was added to Required/Optional fields, Profile Queries (Level 1, 2 and 3), Profile Detail Report and the Client Survey Report. The field is also viewable in the Quick View and Dashboard.

Global Defaults Res Card Defaults

Global Default Res Card Defaults settings regulate *Currency Setup; Default Field Values for Res Cards; More Field Categories; Insurance Prompting; Service Fee; Tax and Commission Defaults; Default Field Values for Invoices; Batch Reminder Settings; Host Codes and Live Connect Login.*

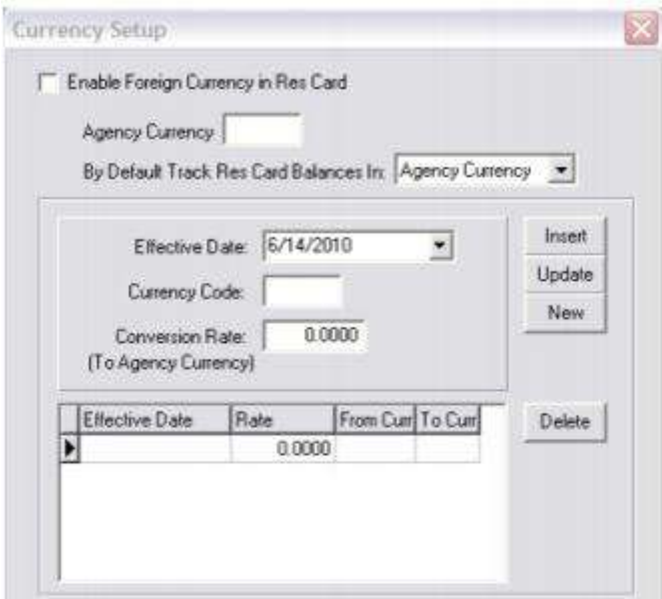
Currency Setup



Track a vendor currency and client currency in addition to your agency currency by setting up the multi-currency feature in *ClientBase*. Although invoicing at this time remains in the agency currency, any additional currencies captured within the vendor or client currency fields within a reservation appears on invoices and itineraries as additional information available for your customer's convenience.

TO SETUP TO CAPTURE MULTIPLE CURRENCIES

Go to **Global Defaults|Res Card Defaults|Currency Setup**. Identify your agency currency as well as setup a table of foreign currencies along with a default conversion rate:



Enable Foreign Currency in Res Card: Place a check mark here to capture the vendor and client currency in addition to your agency currency within the *ClientBase* reservations records.

Agency Currency: Enter the 3-letter code symbolizing your agency's currency code (USD, CAD, etc.) All existing and future reservations default to using this code. Use *Insert/Update/New* to add and maintain a listing of foreign currency codes including the *Effective Date, Currency Code* and the *Default Conversion Rate*. Click *OK*.

When entering the default conversion rate, enter the rate used to convert the foreign currency to your agency currency. For example, if your agency currency code is CAD for Canadian and you are entering a USD foreign currency default, you would enter 1.5 rather than .6666. The default conversion rate entered into this global table, can be overwritten on a reservation-by-reservation basis.

By Default Track Res Card Balances in: Select how you want res card balances to be displayed from drop-down:

Foreign Currency: New reservations are always captured in the currency the transaction was booked in.

Agency Currency - New reservations are always captured in the currency of the agency location.

This is simply a default and can be overridden per Res Card.

Handling Multiple Currencies

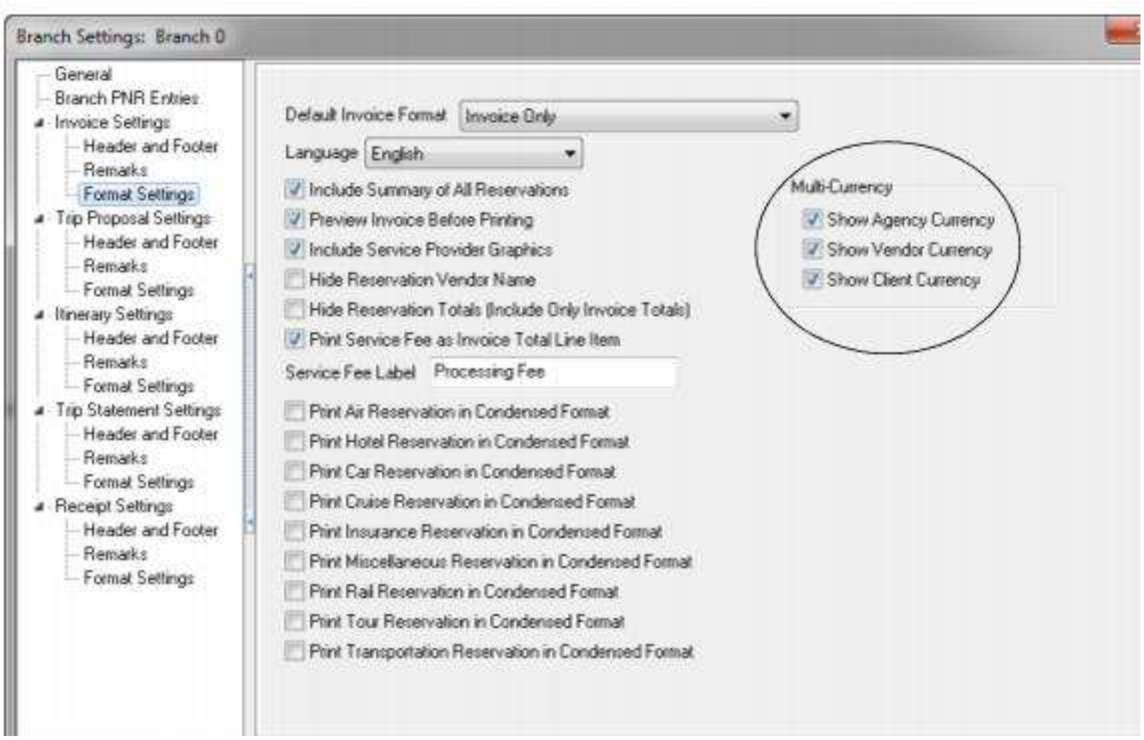
When handling multiple currencies, reservations can be tracked in the agency's currency or reservations can be tracked in the foreign (vendor) currency. The setting *By Default Track Res Card Balances In*" under **Global Defaults|Res Card Defaults|Currency Setup** can be setup as the default. This is simply a default and can be overridden per Res Card.

A Multi Currency tab added to the Res Card also contains this *Track Res Card Balances In* setting in order to update Res Card balances on a one-by-one basis. (**Note:** All multi-currency Res Card balances entered prior to version 3.6 will remain in the Agency Currency unless modified individually.) New reservations with multiple currencies are also tracked in Agency Currency until the setting is changed in Global Defaults or the setting is changed per Res Card under the Multi Currency tab.

Although Res Card balance tracking can be changed from Agency Currency to Foreign Currency and vice versa, change will only occur if Res Card is not invoiced. If the Res Card is already invoiced, this setting under the Multi Currency tab is disabled. If changing from Agency Currency to Foreign Currency, the system checks to see if the record contains Markup/Discounts and if so prompts, *Markup/Discounts exist and are not supported when balances are tracked in the Foreign Currency. Continuing will clear any Markup/Discounts entered. Continue? Yes/No*."

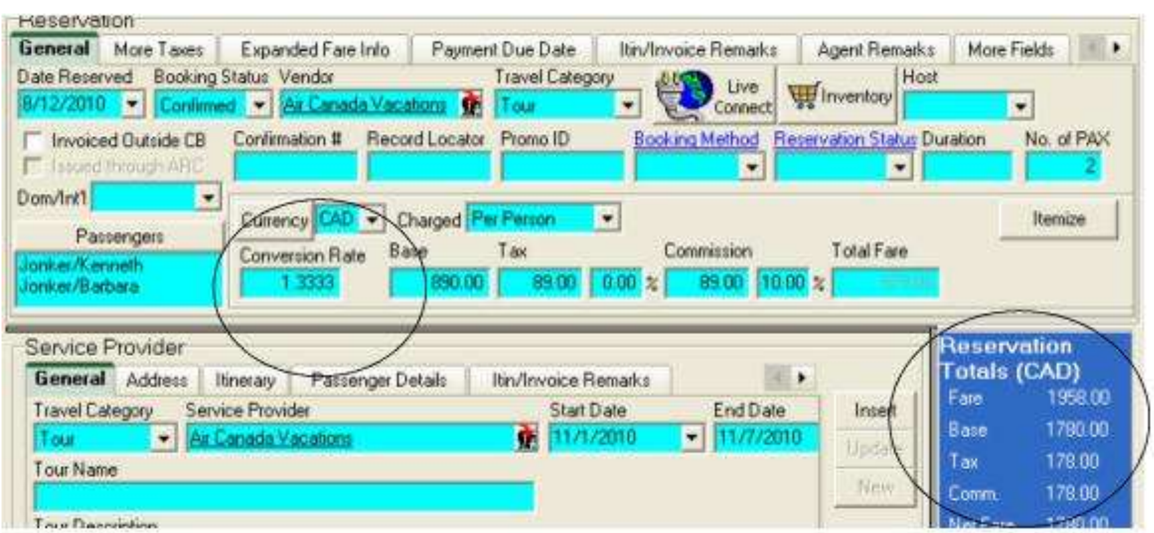
When tracking Res Card balances in Foreign Currency, itemization can now be captured. Itemization is captured in the reservation's currency. If itemization is captured and user changes the selected currency, user is prompted *Changing the Reservation Currency will clear all Itemization details. Do you want to continue? Yes/No.* Since itemization cannot be captured when Res Card balances are tracked in Agency Currency, if changing Res Card from Foreign Currency to Agency Currency the system checks to see if Itemization exists and if so prompts *Itemization exists. Currency cannot be converted at the itemization level. Continuing will clear all itemization details. Continue? Yes/No*

<u>If agency chooses to continue to track reservation totals in the agency's currency</u>, an invoice setting gives the options of showing traveler pricing for each reservation in Agency, Vendor and/or Client currency on an invoice. Select **Utilities|Branch** and then click *Format Settings* under Invoice Settings (this can be done remember at the time of invoicing, by clicking on *Invoice Format)*. A Multi-Currency section is available for selection with the options of *Show Agency Currency, Show Vendor Currency and Show Client Currency*. All three or any combination of these settings may be selected; therefore, check the box or boxes of the currencies that should appear for pricing on an invoice. These settings are only used when Track Res Card Balances is set to Agency Currency.



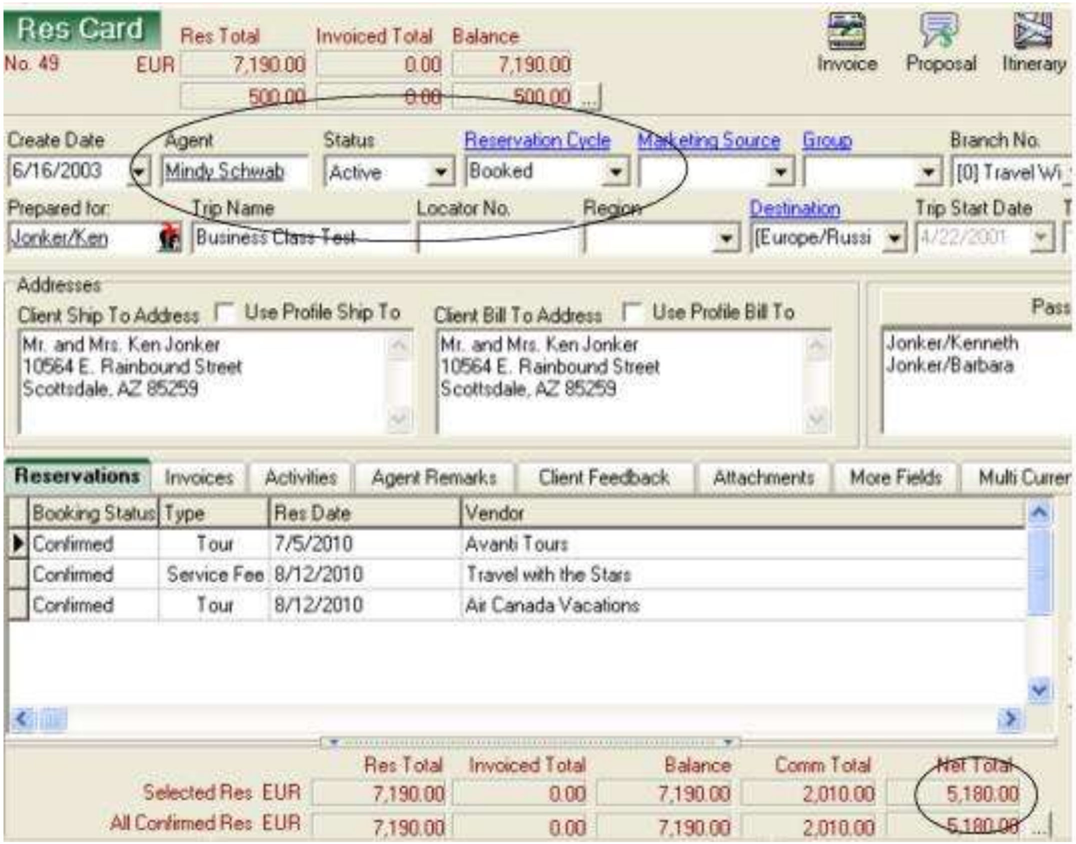
Example: An agency located in Canada booked a cruise with a US vendor. In the Multiple Currency screen the Vendor currency was entered as $1500 US dollars. The Agency Currency was entered as $1400 Canadian dollars. If the *Show Agency Currency* option was checked, only the Canadian dollars appear under pricing when the invoice is generated. If both *Show Agency Currency* and *Show Vendor Currency* options were checked, pricing appears in both Canadian dollars and US dollars. If the client paid for the reservation in a different currency (i.e. Euros) and that amount was entered as the Client Currency on the Multiple Currency screen and all three options where checked, pricing would appear in all three currencies.

If agency chooses to track reservation totals in the foreign currency, when tracking balances in Foreign currency there is no longer a Multi Currency screen. Each reservation is entered in the currency it was booked in by clicking the Currency drop-down and selecting the correct currency code. Once the currency code is chosen the currency rate is displayed. Currency rates are based on the Currency Setup in Global Defaults but can be changed at the time of booking if needed. However, if ARC/BSP is checked, the currency must remain in the agency's currency and the Currency field is disabled.

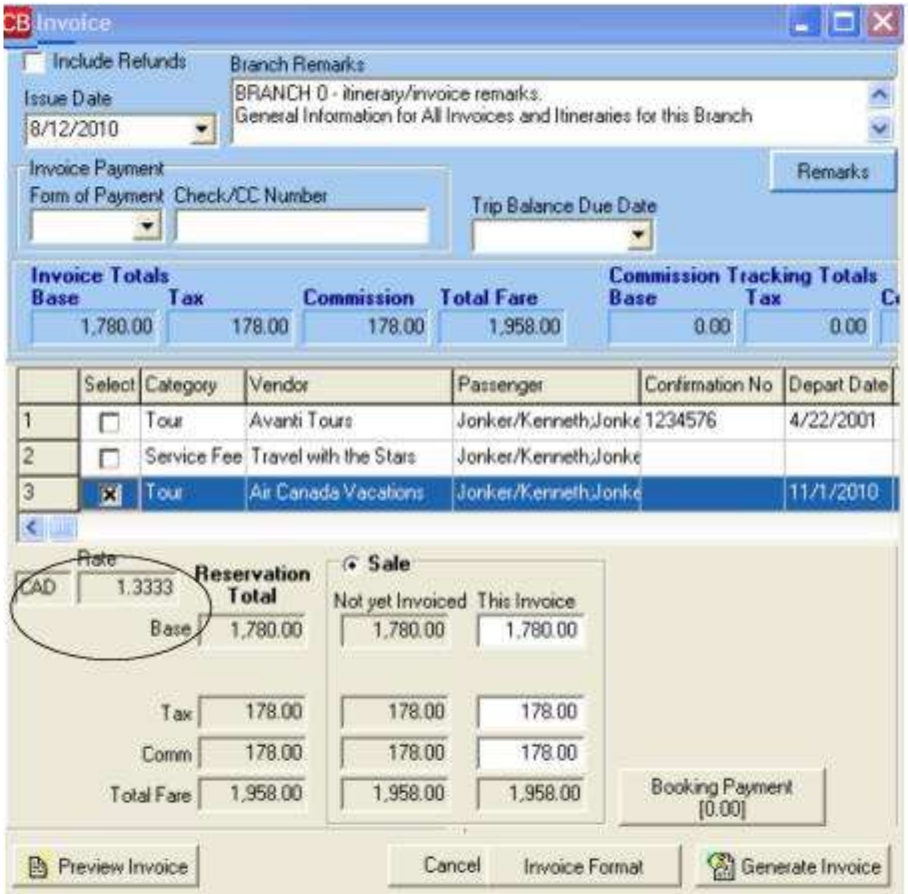


For each reservation, the Reservation Totals summary on the right side of the screen shows the currency code for all foreign currency bookings. The Res Card totals in the Res Card Header will summarize all balances with one line per currency. The first two currencies are displayed; however, if more lines exist, click the button next to the Res Card header to view all.

Reservation totals at the bottom of the Res Card show the balance of the Selected Reservation in the currency it was booked along with the Currency Code. The balances displayed for All Confirmed Reservations summarize all reservations booked in the agency's currency. Click the button next to the Reservation totals at the bottom of the Res Card to view all Reservation totals.



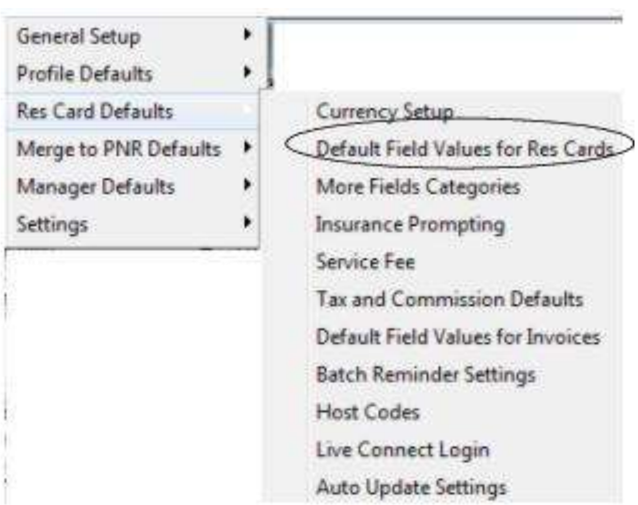
<u>Invoicing</u>: On the invoicing screen, each reservation appears in the currency the reservation was booked in along with the conversion rate. Conversion rate can be changed if needed.



When printing all invoices, each reservation appears on the invoice in the currency it was booked in. All reservations are then totaled per currency and appear at the bottom of the invoice, one box of totals per currency.

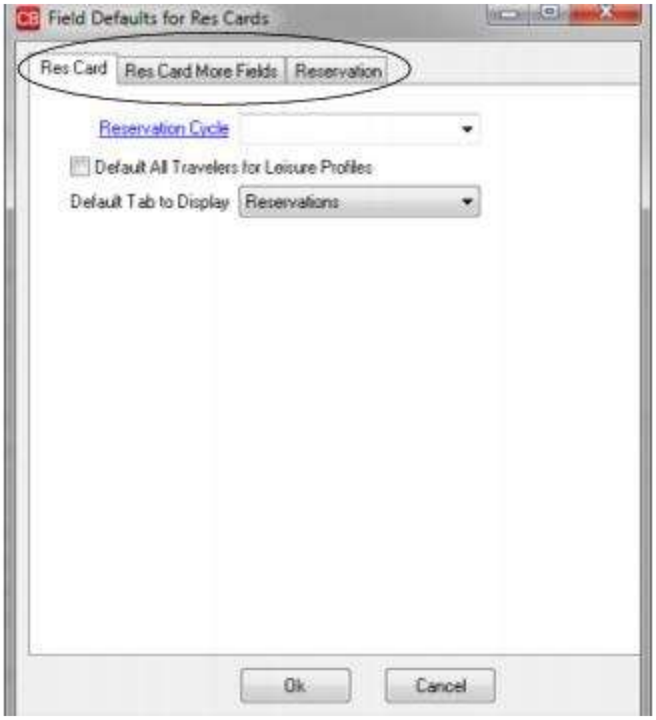
Client payments are printed on the invoice in the reservation's currency. If agency also uses *Trams Back Office* software, client credit card payments are saved in TBO in the agency's currency. Client payments entered as CC Merchant, Debit Card, Check and Cash payments are not saved in TBO and need to be handled in the back office by the bookkeeper.

Default Field Values for Res Cards



Customize some of your Res Cards and Reservation defaults.

RES CARD LEVEL



Reservation Cycle: Set to default to any of user-definable drop-down options.

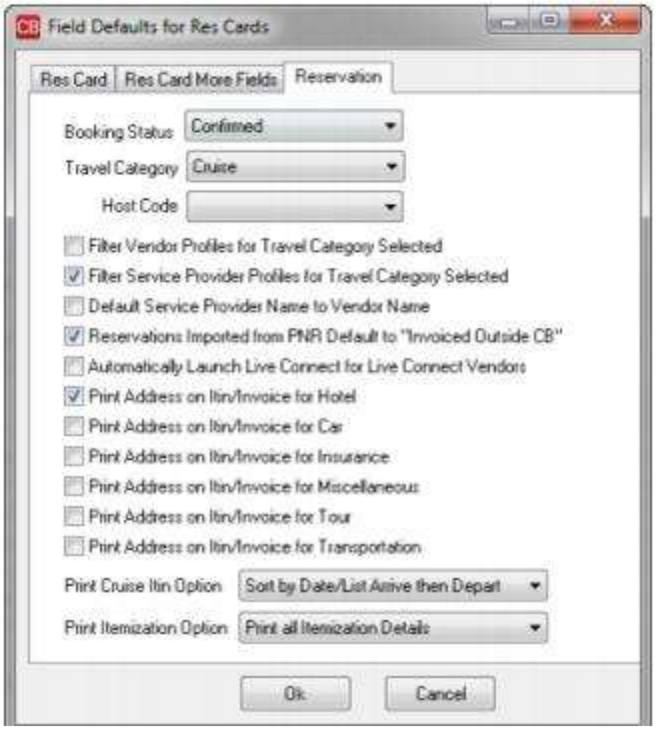
Default All Travelers for Leisure Profiles: Check here if you want all Travelers to automatically be displayed as travelers when you create a new Res Card.

Default Tab Displayed: Select the tab you want to default when entering the Res Card, *Reservations, Invoices, Activities, Agent Remarks, Client Feedback, Attachments, More Fields*, or *Edit History*.

MORE FIELDS LEVEL

From the drop-down options setup for each More Field Category, select the defaults you want displayed for users.

RESERVATION LEVEL



Set defaults for the following reservation areas:

Booking Status: Select *Confirmed, Quoted,* or *Cancelled* from the drop-down menu.

Travel Category: Select *Air, Hotel, Car, Cruise, Insurance, Miscellaneous, Rail, Tour, Service Provider,* or *Transportation* from the drop-down menu.

Host Code: If you are using the IC/Host Utility to export invoices to a Host agency, set a default Host Code that automatically populates whenever adding a new Reservation. The Host Code currently defaults blank, but click the drop-down and select a default Host Code from the list. (Host Codes are created under **Global Defaults|Host Codes**.)

Filter Vendor Profiles for Travel Category Selected: If you have associated Vendor profiles with a *Travel Category* in the General Information tab of the Vendor profiles, check here to display only those vendor profiles of that particular *Travel Category* for selection off the drop-down menu.

Filter Service Provider Profiles for Travel Category Selected: If you have associated Service Provider profiles with a *Travel Category* in the General Information tab of the Service Provider profiles, check here to display only those Service Provider profiles of that particular *Travel Category* for selection off the drop-down menu.

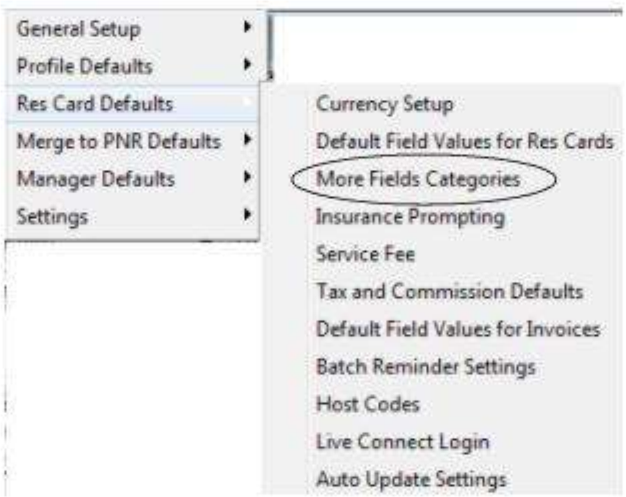
Default Service Provider Name to Vendor Name: If you do not want the Vendor name to automatically drop into the Service Provider name field in a reservation, uncheck this option.

Reservations Imported from PNR Default to *Invoiced Outside of CB+:* If you do not want the *Invoiced Outside of CB+* to be automatically checked off when you do a PNR import, uncheck this option.

Automatically Launch Live Connect for Live Connect Vendors: If you do not want Live Connect vendors to be automatically launched when creating a reservation, uncheck this area.

Print Address on Itin/Invoice for Hotel/Car/Insurance/Miscellaneous/Tour/Transportation: Check or uncheck options for printing addresses on the itinerary/invoice for *Hotel, Car, Insurance, Miscellaneous, Tour,* or, *Transportation.*

More Fields Categories



Res Card More Fields are used for capturing any type of trip data that the Res Card currently is not prompting for, giving you the ultimate flexibility in tracking trip information. Res Card More Fields can be linked to a *Trams Back Office* UDID (User Defined Interface Data) field too, so upon invoicing in *ClientBase*, the more field entry automatically populates the appropriate TBO UDID field. When setting up the Res Card More Fields, you have the ability to link a Profile More Field to a Res Card More Field which means upon creating a new Res Card, the Res Card More Field automatically is completed with the entry in the profile more field.

This means if certain client data is being captured in a profile more field and being merged into a PNR via the PNR rules for the purpose of completing a TBO UDID, you can invoice from *ClientBase* and automatically complete that data into any new Res Cards, and upon invoicing complete the TBO UDID with no extra steps.

Setup Res Card More Fields categories and items by following these steps:

1) Go to More Field Categories to assign a field name by going to **Global Defaults|Res Card Defaults|More Field Categories**, and complete the following fields:

Category Name: Enter a descriptive name.

Profile More Field Link: Link this Res Card More Field to a Profile More Field for automatic completion when creating a new Res Card, by selecting profile more field from the drop-down menu. This field can be left blank, and only works if you currently have profile More Fields created.

UDID No.: To link a specific UDID (User Defined Interface Data) from *Trams Back Office* to a Res Card More Field so that upon invoicing, a Res Card the value in the Res Card More Field automatically populates the value in the TBO UDID, select from the drop-down menu. When the reservation is invoiced, the UDID fields in TBO are populated and appear on TBO invoices/reports, although they do not appear on invoices generated in *ClientBase*. This field can be left blank.

Format Type: Specify what characters are entered into the field. Format Type displays a drop selection of options which are: *None (Res Card More Fields will continue to work as it does currently); Letters Only; Numbers Only; Letters and Numbers Only.*

A different format option can be selected for each Res Card More Field. A field length can also be set for a Res Card More Field by entering the number of characters allowed in the Max Length field. Maximum number of characters for a More Field is 80 characters. The new formatting options can only be used when adding new Res Card More Field categories. Existing Res Card More Field categories cannot be formatted.

When a Res Card More field is formatted, when entering a value for the More Field, the value can only be entered using the format designated for that category. If an incorrect value is entered a message is displayed informing you of the proper format. So if the More Field was formatted to accept numbers only and an alpha character is entered into the field, the message would appear, *Invalid Entry. Format Type is Numbers Only*.

Note: The new Format Options menu is read only for sync copies.

2. Go to **User-Defined Fields|More Field Items|Res Card More Field Items** and use *Add, Modify,* and *Delete* to setup the drop-down list of defaults by completing the following fields:

Category Name: Select the desired Res Card More Field category name by selecting from the drop-down menu. This listing was created when you created the more field categories above.

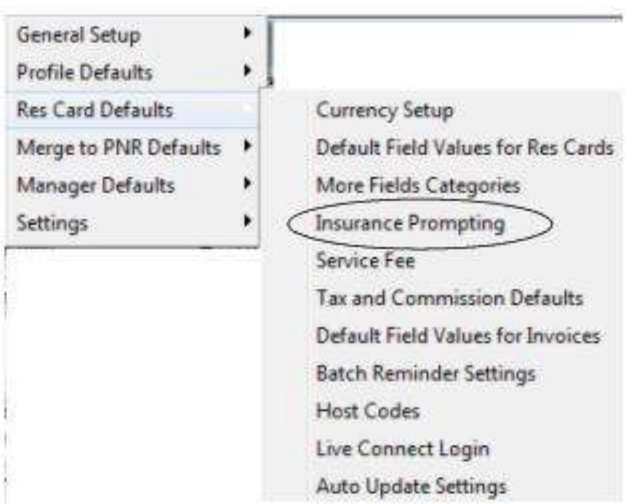
Item Value: Type in the desired Item Value. Click *OK*.

3. Repeat these steps for each Res Card More Field value that you would like to include for each Res Card More Field category.

To learn how to use the Res Card More Fields, please refer to chapter, *An In-Depth Look at Res Cards.*

Use of Res Card More Fields: When More Fields are created, the same More Fields can be used either at the Res Card Level or at the Reservation Level. When a More Field value is entered at the Res Card Level, that value carries over into each of the invoice bookings. A unique More Field value can be made for a specific reservation; however, by going into the More Field tab inside the reservation.

Insurance Prompting



To ensure that travel insurance protection is offered to every customer and either accepted or declined, setup *Res Card Insurance Prompting*. If activated, this feature looks for any insurance reservations at the time of generating an invoice or itinerary. If none exists, the system prompts with a message: ***"No Insurance Reservations Exist for this trip. Accept or Decline Insurance."*** Declining insurance then includes an agency-defined waiver message for printing at the bottom of the invoice or itinerary.

Accepting insurance takes the agent to a new reservation, defaulting the travel category to insurance and the vendor to the agency defined default insurance vendor, for capturing an insurance booking. (*ClientBase* now Live Connects to several insurance companies - see *An In-Depth Look at Live Connect* to setup.)

Go to **Global Defaults|Res Card Defaults|Insurance Prompting**:

Turn on Insurance Waiver Prompt for Invoices: Check to activate this prompt.

Turn on Insurance Waiver Prompt for Itins: Check to activate this prompt.

Default Insurance Vendor: If desired, select a default insurance vendor from your drop-down list of vendor profiles.

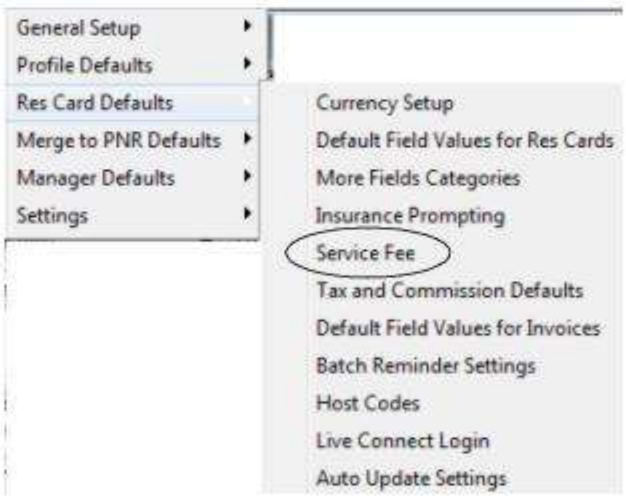
Default Insurance Waiver Message: If insurance is declined, a customized waiver message can be printed on the invoice/Itinerary. Type a waiver message into this free-flow text area. This message appears at the bottom of each *Invoice/Itin* (underneath any branch remarks).

Example:

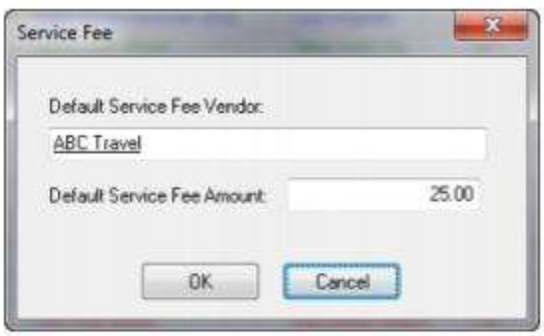
Please Read Carefully: The customer acknowledges that he/she have been offered and declined (YOUR INSURANCE COMPANY NAME HERE) travel insurance protection. This protection includes trip cancellation, baggage, medical and evacuation protection. Since you have declined this valuable protection, you are assuming any financial loss associated with your travel arrangements, including any penalties imposed by suppliers. Please initial here as further confirmation_________. Click *OK.*

Edit History: Click *Edit History* to see history log of any changes made to the insurance prompt defaults which can then be printed or e-mailed if requested by insurance vendors incentivizing agencies' use of *ClientBase*.

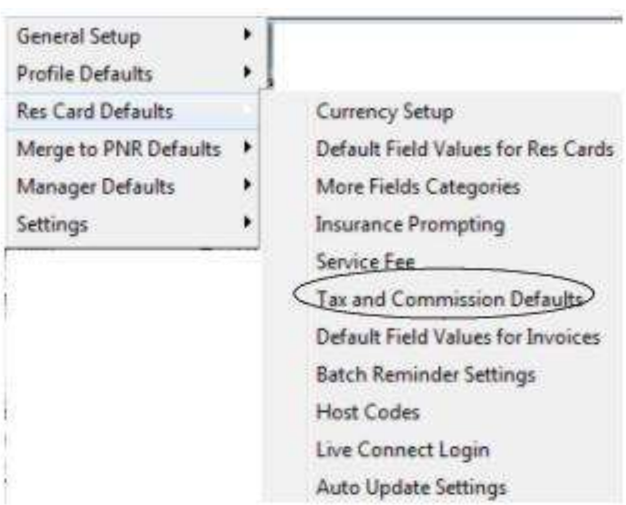
Service Fee



You need to have a vendor profile created for your agency to implement the automated service fee feature. Use the Profile Manager to retrieve the agency vendor profile, and set the default commission to the desired amount (usually 100%). (TBO users, consult with bookkeeper before doing this, she may have it setup already.) Next, go to **Global Defaults|Res Card Defaults|Service Fee**. Type in the default vendor and service fee amount and click *OK.* To use the automated service fee feature, please refer to the chapter, *An In-Depth Look at Res Cards.*



Tax and Commission Defaults

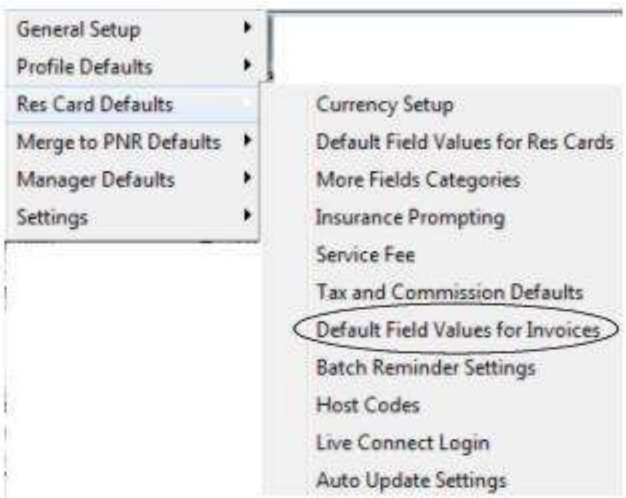


If you are not a TBO user, designate which taxes go to which tax fields when invoicing from *ClientBase*. The commission rate for vendors used in reservations is defaulting to the vendor commission field in the vendor profile. If the vendor default commission is blank, then the commission defaults to the amount entered in the field called *Comm Rate*.

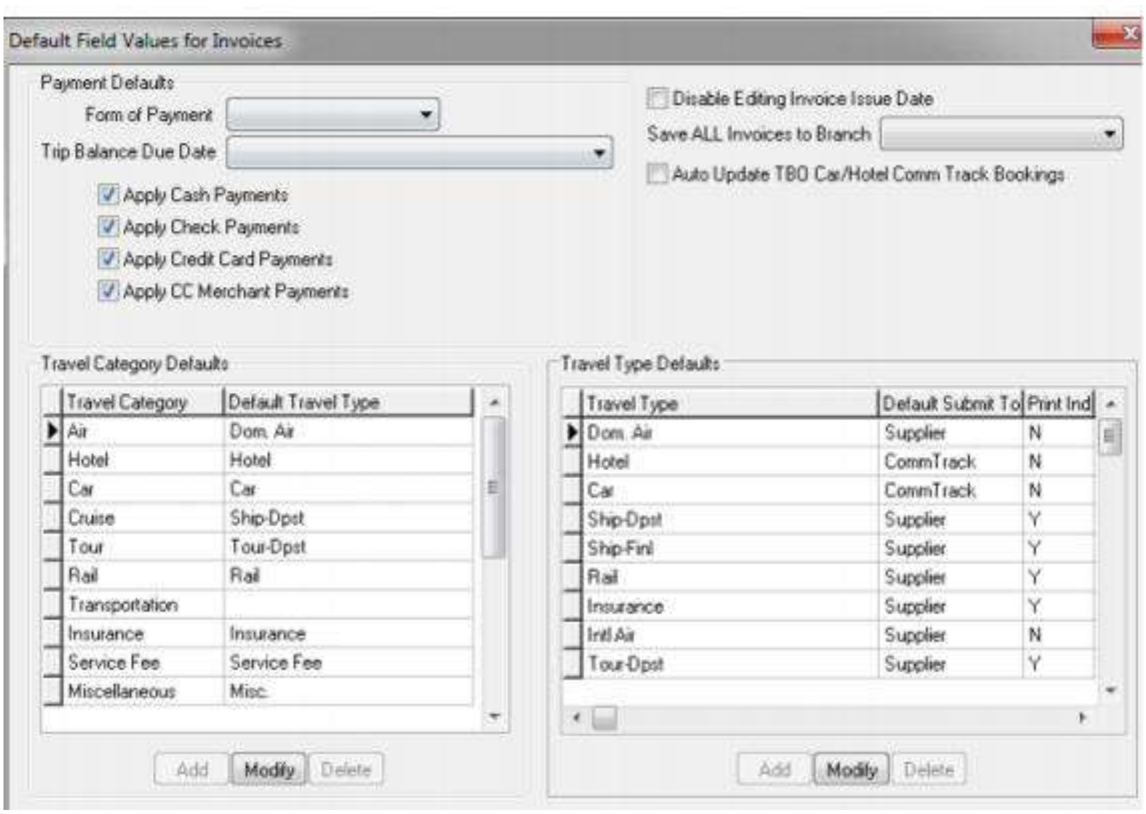
Note: Canadian users find additional fields to accommodate the GST/HST/VAT rate. The GST/HST/VAT Tax codes are used for PNR Import and for invoicing in *ClientBase*. For complete setup instructions for Canadian users as well as Res Card workflow, please see the section in the Res Card chapter, *Canadian Agencies GST/HST Setup/Workflow.*

Hint: Want to fill in taxes and commissions on an reservation-by-reservation basis, leave blank.

Default Field Values for New Invoices



Previous versions of *ClientBase* used the *Trams Back Office* setting for *Allow Cash Payment from Invoice* within the Global Defaults setting to determine whether a cash or check payment should be saved to the database and applied to the invoice to close the Client Balance. Now these settings are captured in **Global Defaults|Res Card Defaults|Default Field Values for New Invoices** option.



Payment Defaults: By selecting a form of payment from the drop-down this **Form of Payment** is the default displayed upon invoicing. You can also default a **Trip Balance Due Date** upon invoicing, by selecting *Earliest Reservation Final Payment Due Date* from the drop-down. This setting is very often filled in upon completion of a Live Connect reservation, or you can manually enter this into a reservation yourself by going to the *Payment Due Date* reservation tab.

A separate setting can be designated for each form of payment: *Cash, Check, Credit Card and CC Merchant*. Adding a check to the form of payment indicates that upon invoicing with that form of payment, the payment is automatically saved and applied to the invoice. Removing the check from the form of payment indicates that upon invoicing with that form of payment, the printed version of the invoice shows as paid, but the payment does not get saved to the database leaving the invoice and Client Balance open.

Tip for Non-*Trams Back Office* Users: By leaving all these forms of payments unchecked, you have ease when voiding out invoices that are incorrect since this area is designed for use with *Trams Back Office*.

Check **Disable Editing Invoice Issue Date** if you want the Invoice Issue Date to remain unchanged. There is also a setting for **Save ALL Invoices to Branch X** which allows an agency to setup multiple branches with different headers/footers, default remarks and format settings within *ClientBase* but still save all invoices to a single branch in *Trams Back Office*. This setting works well for agencies with IC's that want different invoice defaults in *ClientBase* but still need all accounting data to land in one branch.

Auto Update TBO Car/Hotel Comm Track Bookings: By checking this setting, upon saving changes to a Res Card, the program checks for changes made to any Car/Hotel Reservations that were invoiced as Comm Track (with only 1 invoice) and updates the booking in *Trams Back Office* by voiding the booking and adding a new one with the updated information.

Changing a reservation amount in *ClientBase* when the invoice booking shows as paid in TBO updates the *ClientBase* side only. If attempted the system gives the prompt, *TBO Comm Track Booking cannot be updated. Booking was closed*; however, the reservation changes can still be saved in *ClientBase*. Changing a Reservation in *ClientBase* to *Cancelled* will void the booking in TBO without recreating a new booking.

SET DEFAULT FIELD VALUES FOR NEW INVOICES

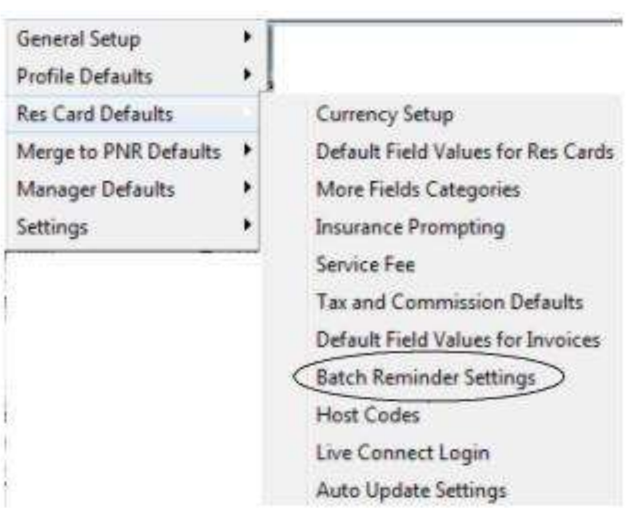
Form of Payment: Set to default to either *Cash, Check, Credit Card, CC Merchant or No Default*. If the default *Form of Payment* is set to Credit Card or CC Merchant, the system automatically defaults the credit card number to the first credit card entry within the profile being invoiced.

Trip Balance Due Date: Set to default to either the *Earliest Reservation Final Payment Due Date*, or leave blank for no default.

Travel Category Defaults: Set a default *Travel Type* for each reservation *Travel Category*.

Travel Type Defaults: Set a default *Submit To* setting for each *Travel Type* as well as a default setting for *Show as Paid when Invoiced as Comm Track*. (Use this for each travel type if you want a comm track amount paid by credit card to appear in invoice totals printed for the customer.)

Batch Reminder Settings

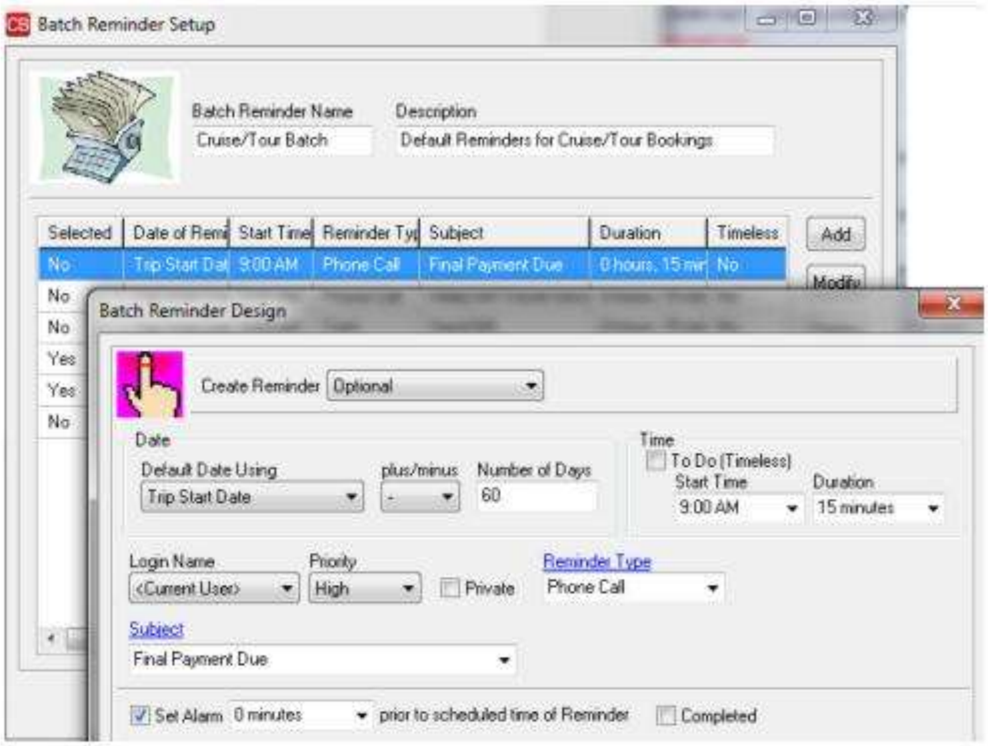


Since many times an agent creates multiple reminders at one time after booking a reservation to help remember common tasks such as collecting deposit, final payment, checking for documents, sending welcome home letters, etc., you can create a global set of *Batched Reminders* that can be launched from within a Res Card to create multiple reminders all at one time.

Although you can add unlimited batches to this area, a default cruise/tour batch has been created for you which contains the reminders, *Deposit Due, Final Payment Due, Validate Int'l Security Information, Send Gift, Check for Documents,* and *Welcome Home.*

To create a batch reminder:

1) Go to **Global Defaults|Res Card Defaults|Batch Reminder Settings.** Click *Add* to add an additional batch, *Modify* to edit an existing batch, or *Delete* to remove a batch.



2) Fill out the *Batch Reminder Name* and *Description* (such as *Cruise Booking Reminders*, or *Default Reminders for a Cruise Reservation*).

3) A batch of reminders can include any number of reminders from 1 to 100. Click *Add* to create the first reminder for the batch and complete the following fields:

Create Reminder: From the drop-down menu, select *Optional* or *Always.* Upon launching batch reminders from a Res Card, a listing of default reminders appears. An *Optional* entry prompts you to "check off" the reminder before placing it into a Res Card; the *Always* entry is already "checked off" for you.

Default Date Using: From the drop-down menu, select *Current Date, ResCard Create Date, Trip Start Date,* or *Trip Return Date.* (These date entries are merge fields used when launching the batched reminders from a Res Card. This defaulted date can be overwritten at the time of launching the batched reminders just before creating and saving them to the Res Card activities tab.)

Plus/minus|Number of Days: From the drop-down menu, select the plus or minus sign and choose the number of days from 1 to 2000 to use in combination with the *Default Date Using* field.

To-Do: Check here if you do not want to set a specific time for this reminder to appear on the Day-At A Glance feature. All timeless activities appear on a separate area in your calendar, but not under a specific time frame.

Start Time: Enter time you want alarm to start alerting you about this reminder; or if you want this reminder to appear on the Day-At A Glance on your calendar as an appointment under the time you specify.

Duration: Specify a block of time for this task to appear on your calendar.

Login Name: Defaults to the user logged into the system. Choose a different user by clicking the drop-down menu.

Priority: Click the drop-down menu to tag this reminder with a priority level - high, medium, or low. The priority level can be used as search criteria in both Level 2 Query of the Activity Manager and viewed in selected activity reports.

Private: Check this box to make reminder private. Only the sign-in agent and SYSDBA can access the reminder.

Reminder Type: Enter the type of follow-up for the reminder by clicking the drop-down menu and picking from a customized list. Such types may include phone call, e-mail, letter, etc. Reminder types are user-defined and setup in **Global Defaults|General Setup|User Defined Fields|Reminder Type** or clicking on the blue underlined label.

Subject: Enter the subject of the reminder by clicking the drop-down menu and picking from a user-defined list. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Reminder Subject**, or by clicking on the blue underlined label.

Set Alarm: To further assist with remembering important tasks, *ClientBase* reminders include an optional alarm. Like the alarm which awakens you each morning, the alarm activates at the time designated within the reminder (regardless of where you are in *ClientBase*, or any other program) as long as *ClientBase* is running on your PC. When an alarm is activated, a window appears that includes the details of the reminder along with three options:

1) *Off:* Turns off the alarm but keeps the reminder open and on to-do list.

2) *Snooze:* Reschedules the alarm for a future time.

3) *View*: Allows you to work the reminder.

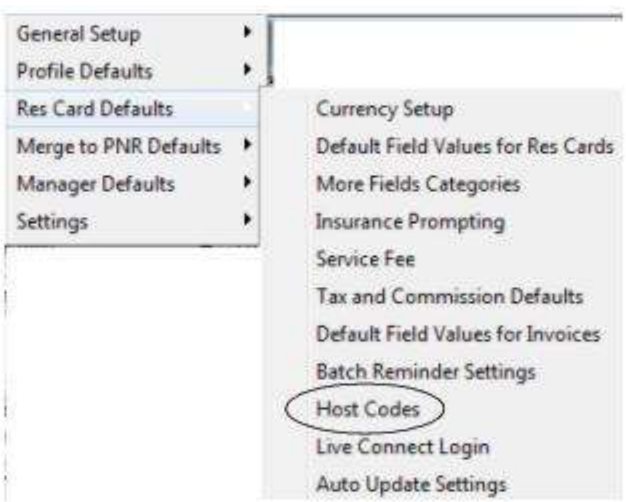
Tip: It is suggested you do not set alarms for the agents' batched reminders. Let each agent set these up for themselves when they launch the batch reminders in the Res Card. This saves them from being barraged with numerous alarms for each Res Card in which they have created reminders.

Completed: This field is empty until the reminder is completed and a date is entered. Entering a *Complete Date* takes this reminder off the to-do list.

Remarks: Enter any additional remarks or instructions in the text box at the bottom of the reminder entry screen.

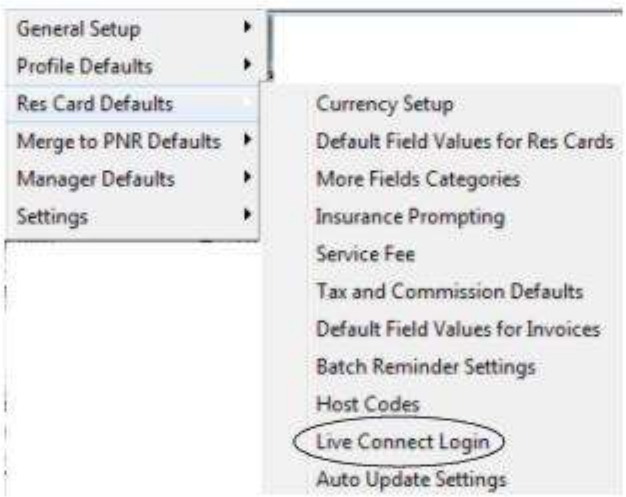
4) Continue entering additional reminders for this batch. After each default reminder is created for this batch, click *OK* to save the batch. Create more than one batch if desired. For directions on how to use batch reminders, please refer to the chapter, *An In-Depth Look at Res Cards.*

Host Codes



If you are sending invoices to a Host agency, you need to set Host Codes in this area as per instructions in the chapter, *Using ClientBase as an IC Working with a Host Agency*.

Live Connect Login

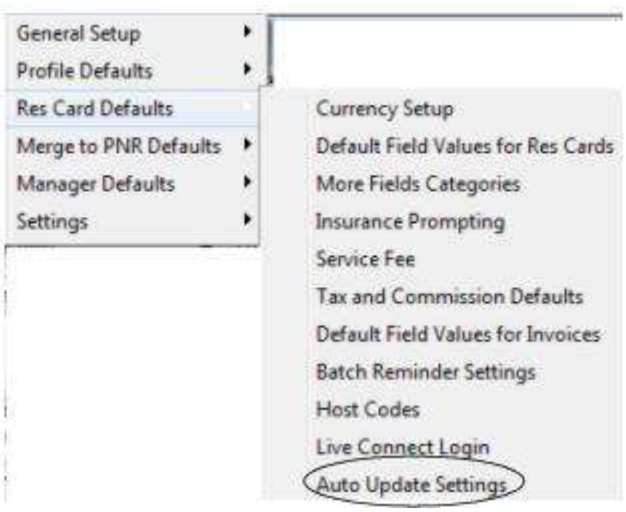


Enter Live Connect login information within the Global Defaults menu for all users of a specific Live Connect Provider. If Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level. To enter one set of login information for a Live Connect provider for all of your agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select from the drop-down list.

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you by the Live Connect provider.

Auto Update Settings



To make updating Res Cards easier and to keep Res Card data current, there is an option in Global Defaults for Res Cards to automatically update the Res Card Status field from Active to Departed once travel dates have passed. To enable this feature select **Global Defaults|Res Card Defaults|Auto Update Settings**. A pop-up box will appear with a checkbox setting to *Automatically Update Res Card Status Based on Travel Date*. Check this box to enable the feature and click the OK button to save.

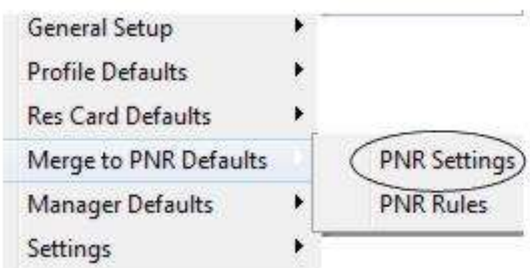
When a user with a Manager login signs into the program, the system runs a query internally of the Res Card Status against Res Card Trip End Dates and looks for Res Cards with status of Active, but Trip End Dates older than the current date. If any items matching the criteria are found the system prompts with the message, *XX Res Cards found with an Active Status but Trip End Dates that have passed. Do you want to update Res Card Status to Departed now? Yes or No.* If the manager selects Yes, Res Card Status is changed to Departed and the Res Card Edit History is updated, showing the manager's User ID as the user that made the change. If manager selects No, nothing is changed and the query runs again the next time the manager logs in.

Note: If you are a sync agency, the Res Card Status is updated from the Primary only.

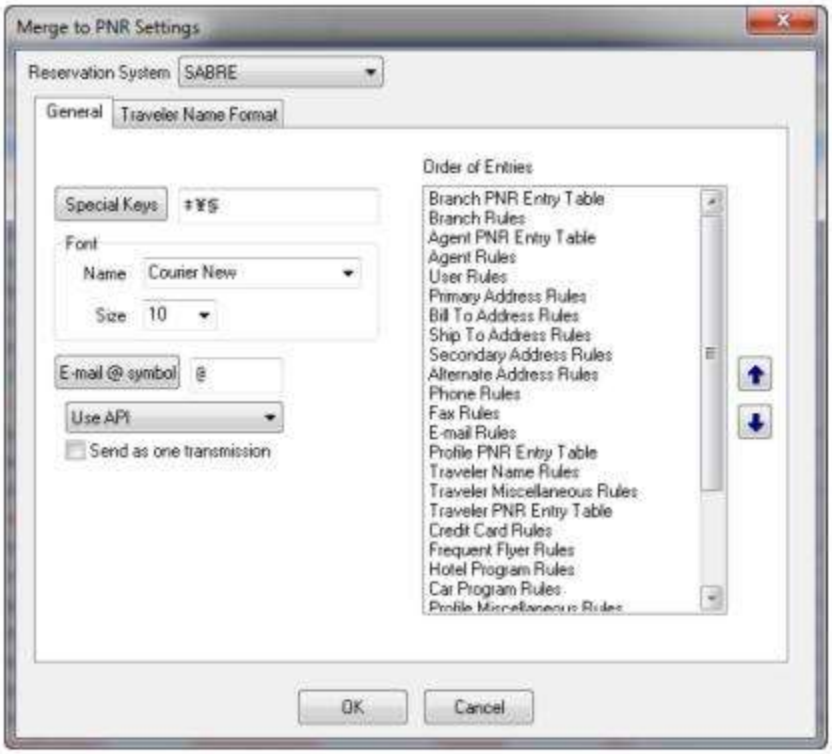
Global Defaults Merge to PNR Defaults

Global Default Merge to PNR Defaults regulate *PNR Settings and PNR Rules for Merge to PNR and PNR Import.*

Merge to PNR Settings



So that information stored in *ClientBase* profiles can be formatted and sent to your CRS PNR, complete the Merge to PNR Settings for your CRS.



GENERAL TAB

Reservation System: Select the appropriate reservation system for your agency from the pull-down menu.

Special Keys: Find the characters especially designed for the CRS system. Since these special characters may be used when formatting your data in *ClientBase*, it's important to include any you want to use in the special keys field. If any are missing, click *Special Keys* and find the special character to bring into *ClientBase*. An easier way to do this is to use the Windows copy command <Ctrl C> to copy the character from your CRS; then use the Windows paste command <Ctrl V> to paste into the special keys field. Any special keys captured here are made available on a toolbar when creating PNR rules or entering PNR entries into any of the PNR entry tables.

Font and Size: Select the desired font and size on entries (we suggest leaving the default).

E-mail @ symbol: Change the default @ character for e-mail entries used in Merge to PNR. You can use the correct character needed by the GDS platform you are using. (This feature applies to e-mail entry in *E-mail Field Group* and *Traveler Misc Field Group*.)

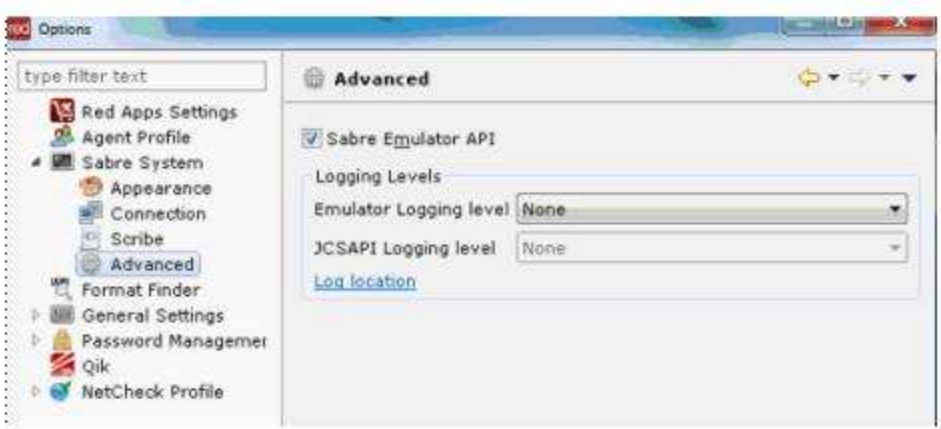
Order of Entries: A listing of all possible PNR rules and entry tables appears here for you to designate the order in which they should be listed when merging a profile to a PNR. A default order is included, but can be modified by highlighting an item and then using the up arrow to move up in the list; or down arrow to move down.

Clipboard: How *ClientBase* works with each GDS varies. Here's some hints on setting up for each.

Amadeus Users: Amadeus uses the Amadeus Selling Platform (see the section about the traditional command pages in Amadeus) as you'll need that to work with merge/import. If you are on terminal services and CB is not then use the clipboard.

Apollo/Galileo: Leave *Use Clipboard* unchecked.

Sabre Red Users: An API is the tool *ClientBase* uses to connect to the Sabre Host. In order for PNR Import (and Merge to PNR) to work, you must enable the MySabre API within Sabre Red. Select **Tools|Options|Sabre System|Advanced** and check *Sabre Emulator API*:



2. In *ClientBase* go to **Global Defaults|Merge to PNR Defaults|Merge to PNR Settings**. Set the Reservation System to Sabre and select *Use MySabre API* from the drop-down listing. (Other choices are Use Clipboard and Use Sabwnapi32.) Please note that this setting can be overwritten on a workstation-by-workstation basis by going to **Workstation Defaults|Environment,** then clicking the Merge to PNR Settings tab from the desired workstation.

3. Use the Merge to PNR and PNR Import features as normal.

If you are using the Webtop platform, check Use Clipboard. You cannot send anything longer than 15 lines or you receive an error of *Message Too Long*.)

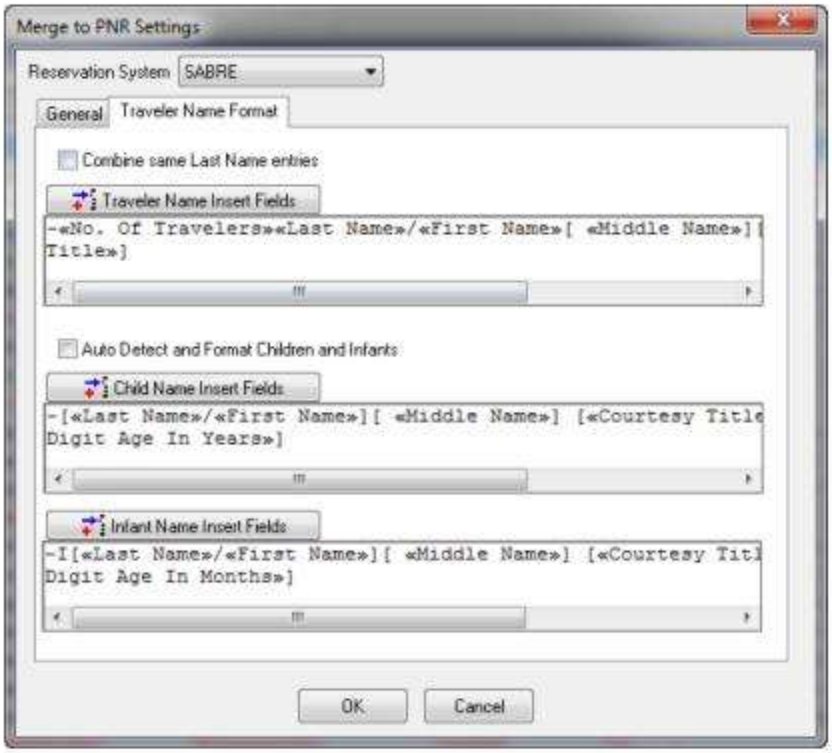
Worldspan: Leave *Use Clipboard* checked.

Note to Nexion Users: Nexion offers an InternetView connection to the GDS's. Since it is Internet based, Merge to PNR via Clipboard is the only GDS related function of *ClientBase* that works with it.

Note: The Windows clipboard method is used to copy/paste data to a PNR if *ClientBase* does not have a way to transmit data directly to the GDS PNR.

Send as one transmission: If you check this setting, *ClientBase* strings together as many entries as it can into one transmission with the use of end items at the end of each line. This reduces the number of hits and potentially the delay created by transmitting each line separately. Please note that Sabre only allows 30 entries strung together in one transmission, so depending on the number of entries included in a given merge to PNR, the entries may be broken into multiple transmissions.

TRAVELER NAME FORMAT TAB

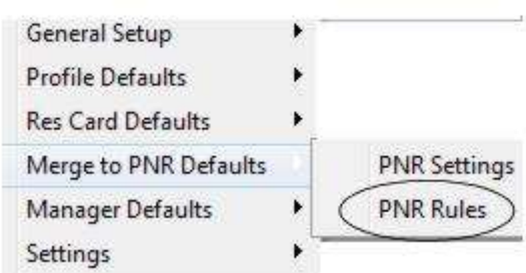


Customize the default name format to add a middle initial, middle name, or remove the courtesy title etc. In addition to being able to use any of these merge fields, *Courtesy Title, First Name, Last Name, Middle Initial, Middle Name, No. of Travelers,* and *Find the character,* there is also a checkbox called *Combine same Last Name entries* which allows you to set whether common name entries appear as one or many name entries.

To modify this default *PNR Custom Rule*, start with the same format you would type into your GDS, and select any Merge Field to include by clicking the field and *Insert.* You may choose to include merge fields that aren't always completed in every profile. An example of this is *Courtesy Title*. If the field is completed, you want it included; but if it's not, you don't want to include the formatting with a blank space. To handle this, PNR rules uses left and right brackets **[ ]** to surround a set of characters within a rule, and designate that if the merge field within those brackets is blank, then don't include any of the characters between the brackets.

Merge PNR Settings for Traveler Name Formats also includes the ability to create custom format settings for Children (over 2) and Infants (under 2). Use a combination of text, merge fields and special characters to format travelers as either children or infants based on the traveler level Birthdate entry. The following Merge Fields can be included in this rule: *Courtesy Title, First Name, Last Name, Middle Initial, Middle Name, No. of Travelers, First Name Initial, 2 Digit Age In Months, 2 Digit Age in Years, Birthdate (various date formats)*.

Merge to PNR Rules



No more multiple entries or databases! *ClientBase* provides agents with the ability to move customer information (maintained in the *ClientBase* profile) to your reservation system's PNR. This feature works with Apollo, Sabre, Amadeus and Worldspan. Virtually any data captured in a *ClientBase* profile can be formatted and sent to the CRS PNR.

ClientBase comes with default entries for all the main PNR entries for each CRS. There is no limit to the information that can be entered into a PNR as long as it is formatted correctly for your CRS. If you do not find the desired entry in the set of default entries, simply follow the directions under PNR rules to add the desired entry to the selection, or modify any existing entries.

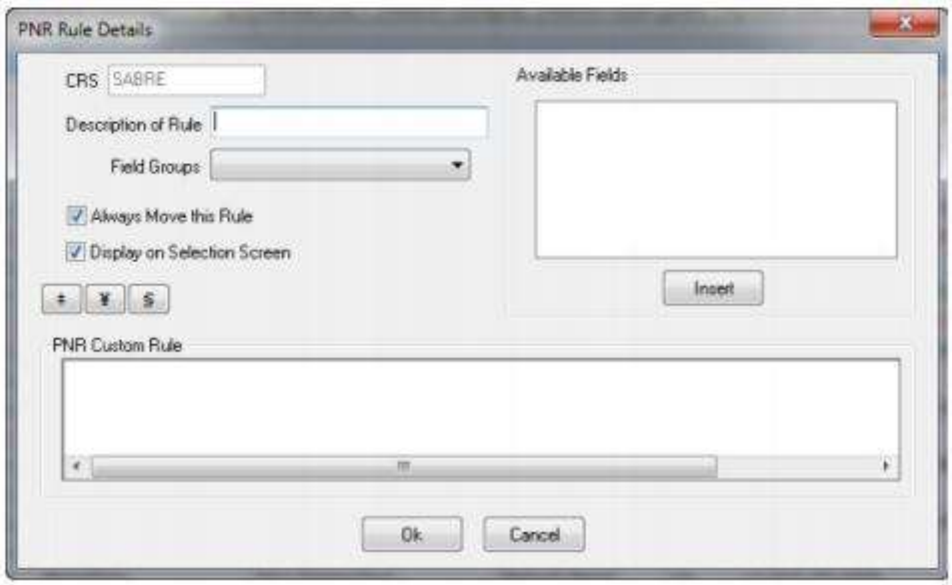
A *Rule* is simply a way of designating how certain fields of information captured in a profile should be formatted when sent to a PNR. *ClientBase* comes defaulted with standard rules for each CRS, formatted for sending the following fields of profile data:

- Bill To Address
- Ship To Address
- Interface ID
- Phone Numbers
- Credit Cards
- Frequent Flyer Numbers
- E-mail

To retrieve the details for any of the default rules, highlight the rule and click *Modify*. The contents of each rule is captured in the area called *PNR Custom Rule* and is made up of free-flow text, special characters and merge fields. Review each rule and verify that the formats used in the defaults match the formats used within your agency when building PNR's. To modify any text, simply type over it. To add an additional merge field, place your cursor where you would like it to land within the rule, then highlight the merge field in the *Available Fields* area and click *Insert*.

ADDING A RULE

Practically any information stored within a *ClientBase* profile can be formatted for your CRS and included when using the merge to PNR feature. To include additional information, in addition to the six areas addressed in the default rules, select the appropriate reservation system and click *Add*.



Do the following to setup a new rule:

1. Description of Rule: Enter a brief description of the type of information you want included in this rule. This description appears on the PNR selection screen when using the merge to PNR feature.

2. Field Groups: Select the type of profile data you want to format for your CRS PNR's. Click the arrow located to the right of this field to select from a drop-down list of choices. Each field group includes a designated list of profile fields available for use within a PNR rule. These profile fields appear in the *Available Fields* area when the field group is selected. Available field groups include *Primary Address, Bill to Address, Ship to Address, Secondary Address, Alternate Address, Phone, Fax, E-mail, Traveler Miscellaneous, Credit Card, Frequent Flier, Hotel Program, Other Cards, Car Program, Miscellaneous, User Login, Primary Agent, Profile Mixed Fields* (create a rule with combination of merge fields)*, Branch* and *Res Card Invoice.*

3. Always Move This Rule: When checked, this field sets the rule to always move this entry into a PNR; left unchecked, the entry is optional.

4. Display on Selection Screen: Within each PNR entry or PNR rule that is set as *Always Move This Rule*, an option is included called display on selection screen. The PNR selection screen is the first screen that appears when you merge to PNR, 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 first selection screen is less complicated for the agent to review. These unchecked rules now appear on the second *Additional Entries* screen in the merge to PNR, and are automatically moved into the PNR.

5. PNR Custom Rules: Enter the exact format to be entered in the PNR when this rule is selected using the combination of free-flow text, special characters, and merge fields from the list of available fields. Refer to your current scripts, GDS format guide and back office format documentation to create the custom rule.

Note to Amadeus Users: Amadeus Vista users use a semi-colon (;) as a delimiter. Amadeus APS and ProWeb users use # as a delimiter.

HANDLING BLANK MERGE FIELDS

When setting up rules, you may choose to include merge fields that aren't always completed in every profile. Such fields include *Courtesy Title, Apt/Suite,* or *Company Name*. If the field is completed, you want it included; but if it's not, you don't want to include the formatting with a blank space. To handle this, the PNR rules uses left and right brackets **[ ]** to surround a set of characters within a rule, and designate that if the merge field within those brackets is blank, then don't include any of the characters between the brackets. Here's an example:

The brackets around **[5/<<CompanyName>>§]** suggest that if this is an leisure profile so the *Company Name Merge Field* is blank, then don't include the 5/ or end item formatting either.

PNR Rules to Use for Rescard Invoice Data

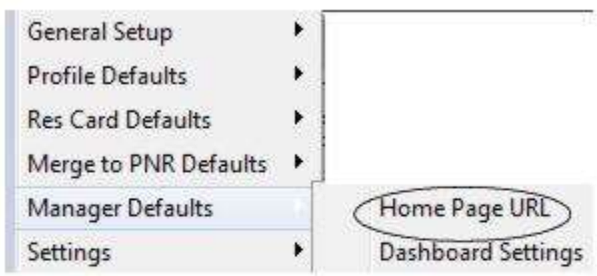
Agencies **NOT** using *Trams Back Office* (TBO) can print invoices from *ClientBase*, and then send the invoice data to a PNR in the form of accounting lines, so that it can be interfaced to their back office accounting system. In order to take advantage of this feature, *Merge to PNR Rules* need to be setup using the *Rescard Invoice* field group following the directions outline in the sections *Adding a Rule* and *Handling Blank Merge Fields*. (The *Res Card Invoice* field group includes a designated list of Res Card invoice fields available for using within a PNR rule.) Need sample invoice rules for your GDS? E-mail **Trams.GDSDesk@sabre.com**.

Note: (Do not pass Res Card invoice data into a PNR for future invoicing if you have *Trams Back Office* as your back office system.)

Global Defaults Manager Defaults

Global Default Manager Defaults regulate *Home Page URL* and *Dashboard Settings.*

Home Page URL

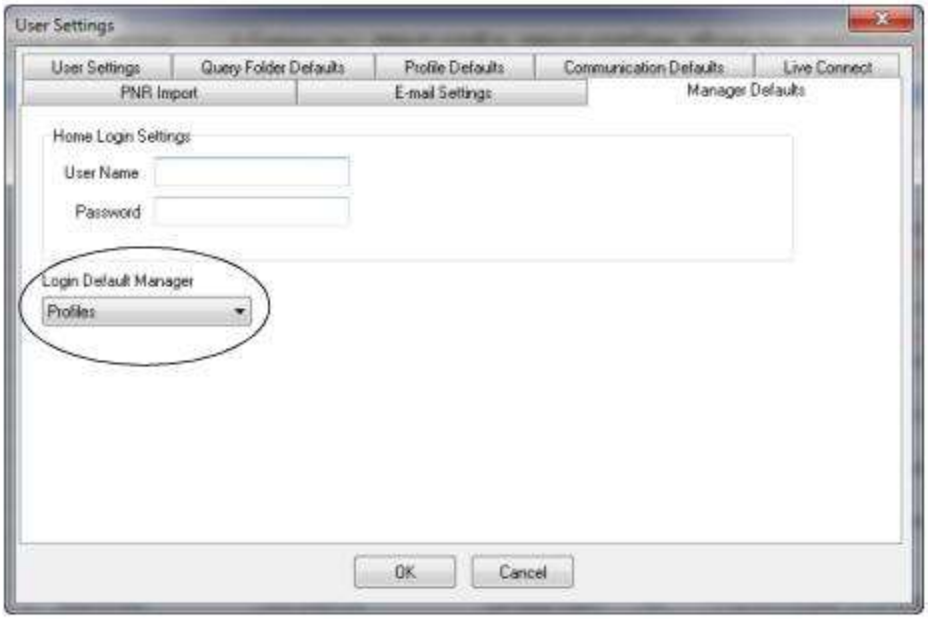


You can change the URL for your Home Page Tab in the Managers. For agencies with a specific private labeled version of *ClientBase*, the default URL is your booking engine or consortium site. For those not configured with a specific private labeled version of *ClientBase*, we added a the CBMS (*ClientBase* Marketing Services) URL here so that the tab within the *ClientBase* main Managers called *Home* takes you to this marketing web site by default. For agencies that participate in the CBMS marketing program, you can enter your CBMS Login and Password into your *ClientBase* User Login by going to **Utilities|My Login|Manager Defaults** tab.

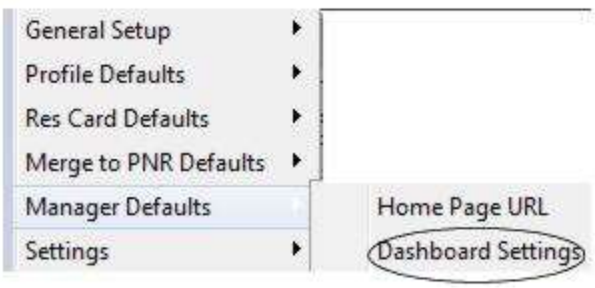
(The SYSDBA login can enter for all users as well.) Once captured, the *ClientBase* login will auto log you into *ClientBase* Marketing Services (CBMS) and access to your marketing calendar and other information becomes instantly available and right within *ClientBase*.

Note: Users have the option of whether to pass login parameters or not. If checked URL entered for the Home Manager would only work if setup to accept the login parameters that are passed. If not checked, any URL entered will appear in the Home Manager without an error.

Hint: Don't want this home page to be the first page you see when entering *ClientBase*? Perhaps you'd like the Profiles Manager, or another manager to be first. Do this by going to **Utilities|My Login** and set the *Login Default Manager* to *Profiles.*



Dashboard Settings

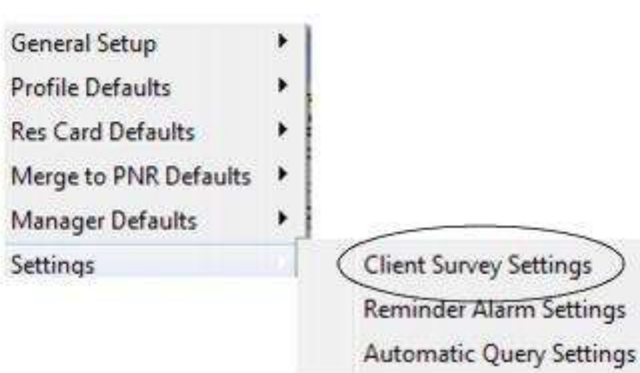


Agency Bulletin - this section displays announcements and other important information that the agency owner/manager wants to broadcast to all agents. When a new message is entered in this area, the Agency Bulletin header will flash to alert each agent upon entering *ClientBase* that new information has been posted. To setup the Dashboard Manager, go to **Global Defaults|Manager Defaults|Dashboard Settings**. Under the Agency Bulletin, enter any announcements and important information that all agents should be updated about. Text can be formatted using different fonts, colors, etc. URL's can also be entered so agents can click and go directly to the website(s) provided.

Global Defaults Settings

Global Default Settings regulate *Client Survey Settings; Reminder Alarm Settings* and *Automatic Query Settings.*

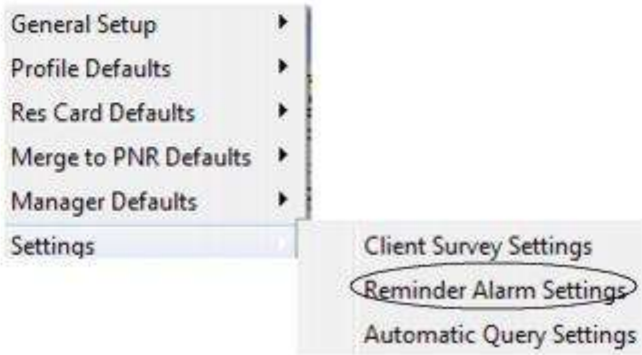
Client Survey Settings



Users may define what marketing tables and codes are included on the client survey report generated by *ClientBase*. To set client survey defaults, go to **Global Defaults|Settings|Client Survey Settings**. Highlight any marketing tables NOT to include in the client survey and click the left arrow to move them off of the list of *Marketing Categories in Client Survey*.

You also have the option of *Print only codes selected for profile*, which when selected, does not print all marketing codes available, but just the codes already selected for the profile. These Global Defaults can be overwritten each time client survey is printed. Client surveys can be printed one at a time from within a client profile by clicking the printer icon on the toolbar, or multiple surveys can be printed from the results of a Query, by going to **Reports|Profile|Client Survey**.

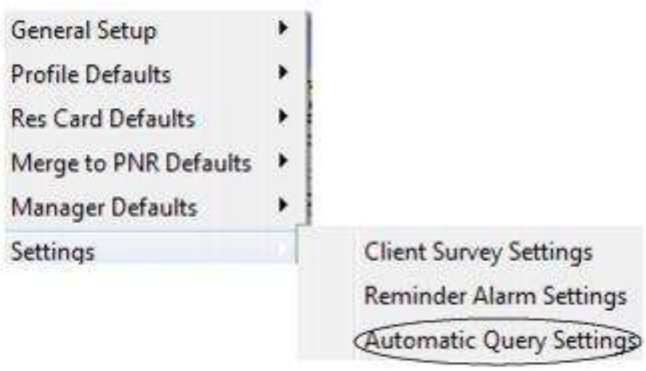
Reminder Alarm Settings



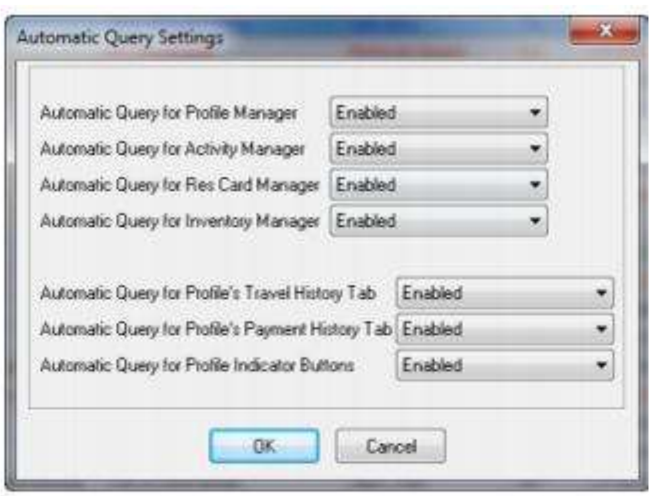
Default New Reminder Alarms as Checked: Check here to have the alarm setting checked automatically each time a new Reminder is created.

Alarm Mechanism: *ClientBase* uses the *IB Events* tool in Interbase to enable the server to automatically distribute alarms it detects to the workstations. By default this tool is activated globally. Some remote workstations, however, may have trouble getting alarms because of firewalls or the newest security measures Microsoft Windows has in place for its versions. For this reason, you have the ability to disable *IE Events* globally, or to set this tool to *Polling.* With *Polling*, you can select to have the workstations poll (or Query) the server for any alarms periodically to send these alarms to them. By default we suggest the *Polling* be set to every 2 minutes, but you can change this duration if you so choose.

Automatic Query Settings



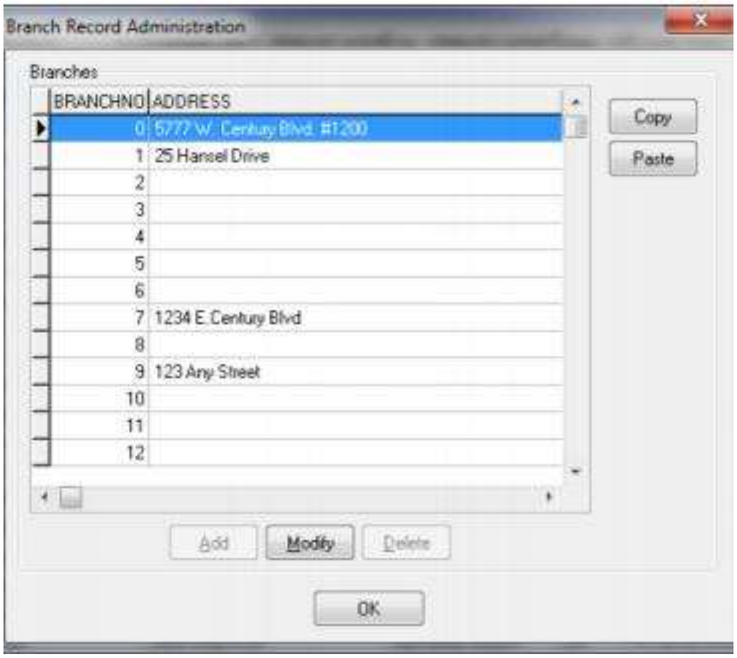
Upon installation of *ClientBase*, by default all queries are automatically enabled in each of four managers (Profile, Activity, Res Card, and Inventory), as well as in the Profile Travel History tab, Profile Payment History tab, and on the Profile Indicator buttons. If your database contains more than 25,000 profiles; however, you may want to consider disabling this automatic Query option for optimum performance. To do this globally, go to **Global Defaults|Settings|Automatic Query Settings** and select *Disable* from the drop-down menu for any of the queries that you do not want to run automatically.



Special Note to Remote Users: Also, if you are a user connecting to the *ClientBase* database remotely, you need to disable the automatic Query option. This can be done at the workstation level, by going to **Workstation Defaults|Environment|General Options and Profile Options.**

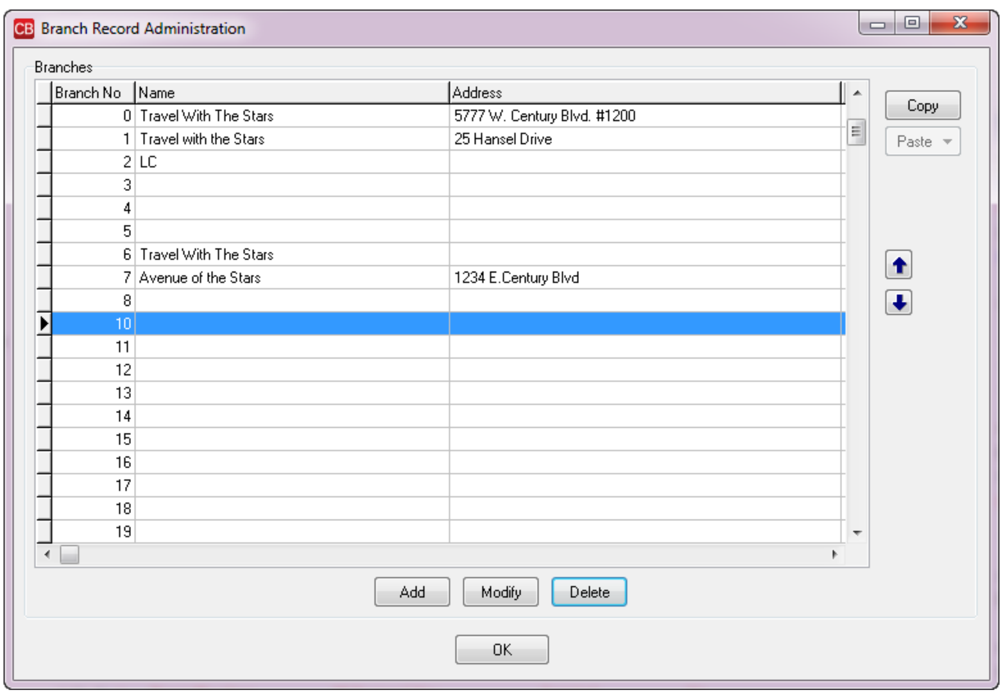
Set Up Branches

ClientBase has a centralized database which means that all branches associated with the agency are included within one database. The program comes with an unlimited number of branch records and for reporting purposes, this feature makes it extremely convenient to analyze the database by branch entries. Each client and agent profile has a field where the branch number can be entered. This entry is not a mandatory field in the client and agent profile, but we do suggest it be linked to the agent profile if possible.



Copy/Paste: For you convenience there is a *Copy/Paste* option for Branches. This is quite a timesaver if you have setup one branch and don't want to repeat this process for other branches. Highlight the branch entry to copy and click *Copy.* When *Paste* is selected, you can choose *Paste Over Selected Branch,* or *Paste as a New Branch.* All branch fields and settings are overwritten with the defaults from the branch copied, except for address, communication entries, Branch ID, Next Sales and Refund Invoice # in the general area. Nothing is saved until *OK* is selected, so please review all areas of the branch settings before saving to ensure you have not lost any information that you may not have realized got overwritten with the *Paste* feature.

Trams considers the 0 Branch as the main branch and 1, 2, 3, etc. as Branch 1, 2, 3. Click *Modify* to enter the branch information from an existing blank branch.



There are 1000 branches available for use. .Branches can be added and deleted. A branch cannot be deleted if there is a profile, res card, invoice or payment record assigned to it. Branch numbers of deleted branches can be re-used. All newly added branches are added at the end of the list of branches, even if they are reusing a number from a deleted branch that used to be higher up. The order of branches can now be changed using the up and down arrows on the right side of the screen. This sort order is shared by all Trams products.

Branches can only be added, deleted, or re-ordered on the Primary copy of the database.

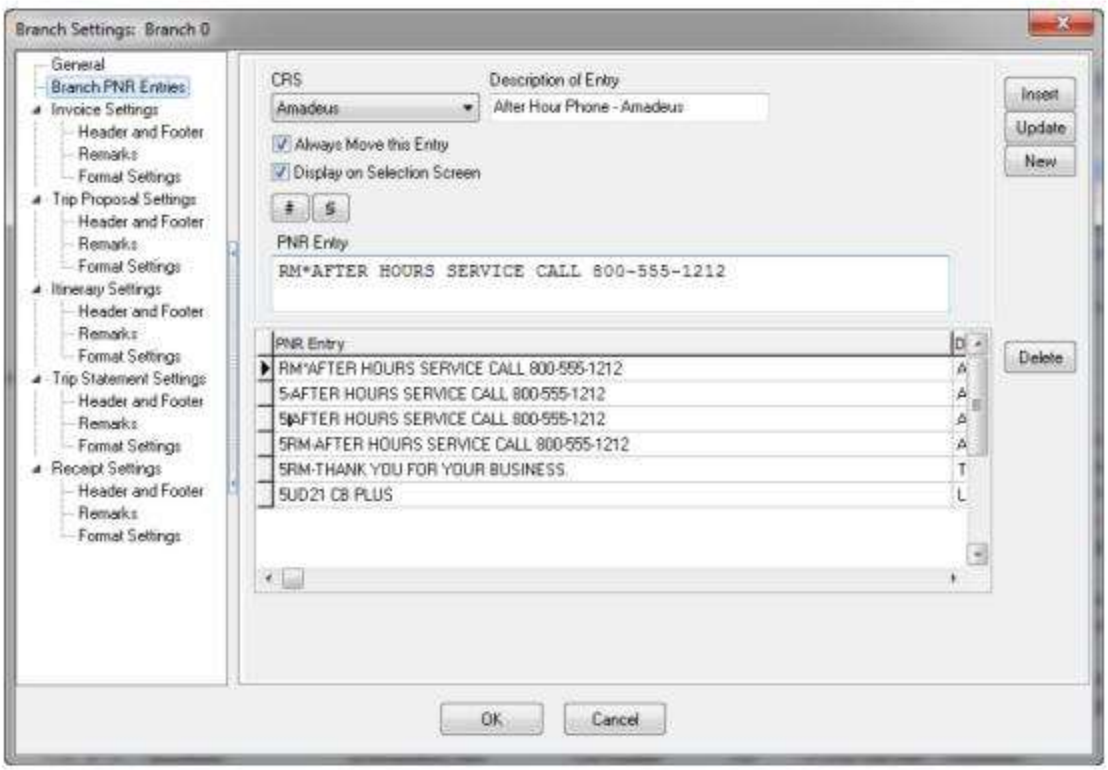
General Branch Info

Click *General* in the directory on the left. Enter the branch information. All the fields in this screen are shared with *Trams Back Office* except for *Next Sales Invoice Number* and *Refund Number*. *ClientBase* can have its own separate sequence of invoice/refund numbers for use when generating invoices/refunds in the Res Card. If your agency starts generating invoices/refunds from the *ClientBase* Res Card, enter the starting invoice and refund number here and the system automatically assigns the next sequential invoice/refund number each time an invoice/refund is generated. Since *Trams Back Office* does not allow duplicate invoice numbers, be sure to start a series of numbers not currently in use in *Trams Back Office* (the system allows up to 9 digits).

Tip: If you are a *Trams Back Office* user, start your *ClientBase* invoice/refund numbers with different numbers, so you can differentiate between invoices/refunds driven by your GDS, those created in *ClientBase*, and if you have a separate series set up for manual invoices and refunds in TBO, those as well.

Branch PNR Entries

Click *Branch PNR Entries* in the directory on the left. *ClientBase* comes with a PNR entry table at the branch, agent, profile and traveler level. These tables allow you to capture any PNR entries or remarks you would like included when sending data to a PNR. The branch level entries tab is where information can be included in a PNR regardless of the agent, client or traveler selected. Examples are the communication information for the branch or an appreciation message for the client's business.



Use *Add, Modify,* and *Delete* to create a tailored list of your agency PNR information.

CRS: Choose CRS (GDS) system from the drop-down menu.

Description of Entry: Enter a free-flow description.

Always Move this Entry: By checking this box, the entry always moves (is check off automatically) when you do a move to PNR. If this box is not checked, moving the entry is optional (and you'll need to check it off).

Display on Selection Screen: Within each PNR entry or PNR rule that is set as Always Move This Rule, an option is included called Display on Selection Screen. The PNR selection screen 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.

PNR Entry: Enter the PNR entry exactly as you would in your reservation system, using text and special characters and press *OK* to save.

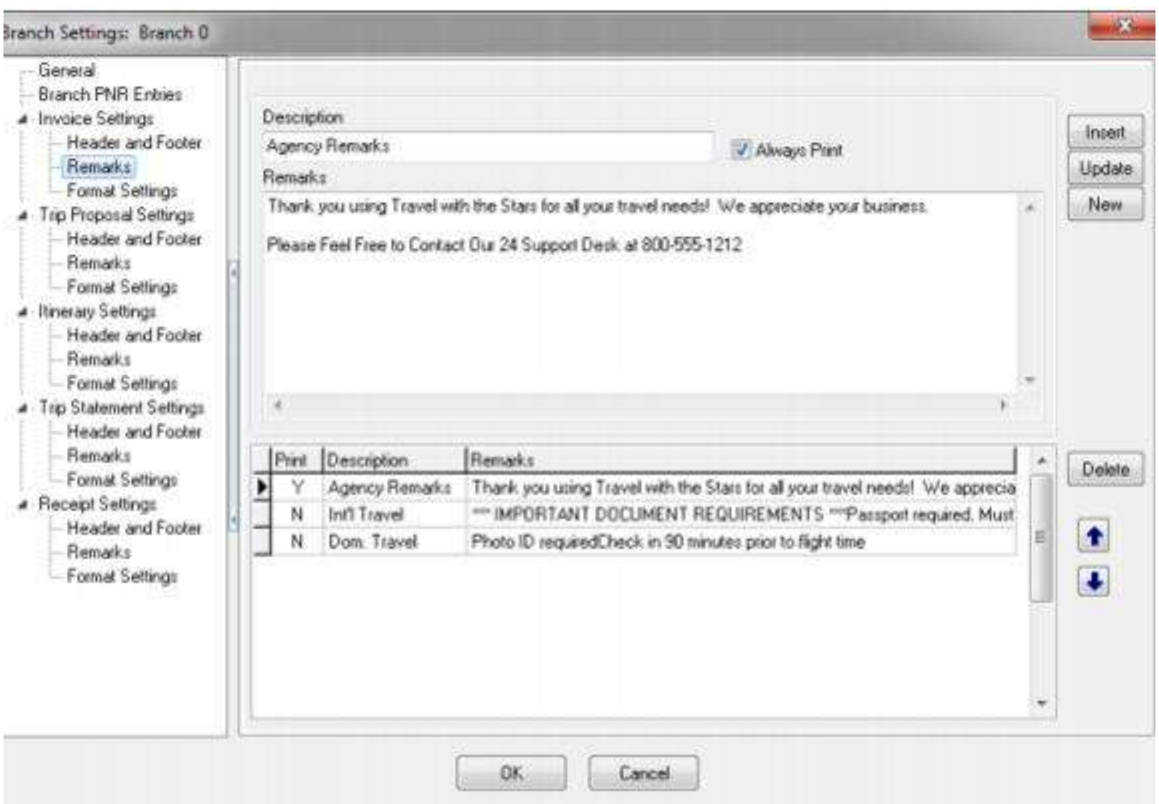
Branch Invoice Settings

HEADER/FOOTER - Agencies with multiple branches have the option of setting up just one global header/footer (**Global Defaults|General Setup|Header and Footer|Invoice**) and use the branch merge fields for customization by branch. Settings here at the branch level **override** the global level, if headers/footers have been setup in both locations. If you want to setup a very unique logo for this branch, follow the directions for creating unique logos in the *How to Set Up User Level Logos in Headers/Footers* in the **Global Default General Settings|Header and Footer|Invoice** section of this chapter.

This method allows you to insert a branch logo into the agent profile attachment tab and becomes a merge field in global Invoice/Trip Proposal, Itinerary, Trip Statement, Document Templates, Reports, and Receipt settings.

REMARKS **-** *Invoice Remarks* is a table providing you with the ability to capture multiple remarks then select them as desired for printing upon invoicing. To access the table of branch remarks for invoices and itineraries, go to **Utilities|Branch**. Select the desired branch and click *Remarks* under *Invoice Settings* in directory on left. Use *Add, Modify* and *Delete* to create multiple remarks for use when invoicing and printing itineraries. Each remark captured includes a *Description, Free Flow Remarks* (no character limit) and a check box, *Always Print*.

Upon invoicing all remarks with *Always Print* checked off, print by default, but can be unchecked upon invoicing. All remarks with *Always Print* unchecked do not print by default but can be checked upon invoicing. As an example, you may want different remarks printed on your invoices when invoicing a cruise vs. a package. If so, setup 2 different remarks, one called *Cruise Remarks* and the other called *Tour Remarks*. Leave *Always Print* unchecked, and then select the desired remarks upon invoicing. There is no limit to the remark entries added to the remarks table.



Default Itin/Invoice Remarks: Add unlimited remarks in the form of a table list that agents can pick and choose from depending on the type of reservation. Enter any remarks you want to appear on itineraries and invoices by clicking *Add*.

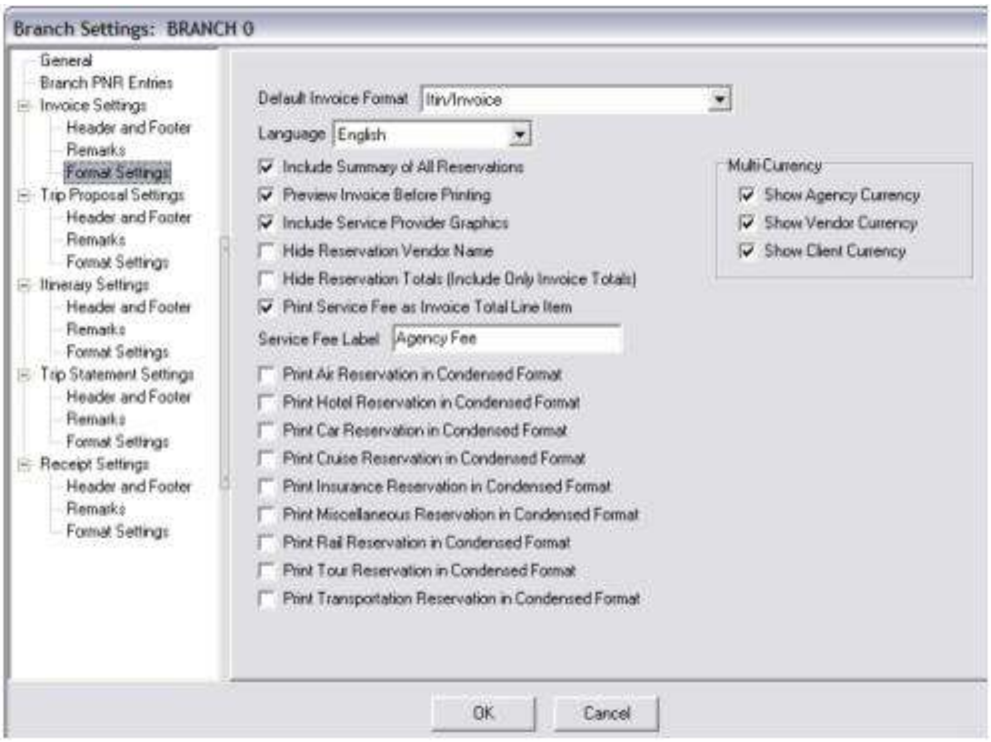
Always Print: If you want this to always print on an invoice or itinerary, check here. If you want the agent to choose whether it prints or not, leave blank.

Description: Create a description for agents that accurately describes this particular remark.

Remark: Enter the remark you want printed on the invoice or itinerary. Highlight the remark and click *Modify* to edit a remark, or click *Delete* to remove a remark.

Tip: Need to change the order of the remarks as they print on an invoice or itinerary? Rearrange the order by using the blue up and down arrows.

FORMAT SETTINGS **-** Set Branch invoice defaults that can be overwritten on an invoice-by-Invoice basis by clicking the *Invoice Format* button on the *Generate Invoice* screen.



Default Invoice Setting: Set the Res Card invoice default as *Invoice Only* which is a shorter invoice format that does not included all itinerary level information; or *Itin/Invoice* which is a longer invoice format that does include all the itinerary level information.

Language: Defaults to English but can be changed to French or Spanish. This branch level language default can be overwritten on an invoice-by-invoice basis by clicking the "Invoice Format" button on the Generate Invoice Screen. Please keep in mind that all field labels have been translated to French and Spanish, but the agent must capture the Reservation entries in the desired language in order to print in that language. Also, Invoice Header/Footer labels are defined by the agency and therefore cannot be translated. **Tip:** You may want to consider setting up a special Branch for "French|Spanish" Invoices and change the Header|Footer merge field labels to the desired language and hand select this branch's Header/Footer when generating invoices in French or Spanish.

Include Summary of All Reservations: Set the Res Card invoice default by checking if you want reservation details including balance due date to appear on the invoice.

Preview Invoice Before Printing: Set the Res Card invoice default by checking if you always want a preview invoice (highly recommended) to be printed before actually generating the invoice.

Include Service Provider Graphics: Set the Res Card invoice defaults by checking here if you want service provider graphics included when an invoice is printed.

Hide Reservation Vendor Name: Gives you greater flexibility in customizing the print out of an invoice. If this setting is checked, then the Vendor Name for each individual reservation within the Res Card being invoice will not be printed, only the Service Provider Names.

Hide Reservation Totals (Include Only Invoice Totals): Gives you greater flexibility in customizing the print out of an invoice. If this setting is checked, then each individual reservation amount will not be printed, only the sum of all reservations being invoiced.

Print Service Fee as Invoice Total Line Item: Gives you greater flexibility in customizing the print out Service Fees on an invoice. If checked, this setting adds any reservations with a Travel Category of Service Fee and prints them as a single total amount listed within the Invoice Totals just underneath Reservation Totals, rather than listing as a separate reservation within the body of the invoice.

Service Fee Label: This is a free-flow field that allows for up to 25 characters and provides you with the ability to customize how agency service fees are labeled on the invoice.

Print Reservation in Condensed Format: The following *Print Reservation in Condensed Format* are broken down by Travel Category:

Print Air Reservation in Condensed Format

Print Hotel Reservation in Condensed Format

Print Car Reservation in Condensed Format

Print Cruise Reservation in Condensed Format

Print Insurance Reservation in Condensed Format

Print Miscellaneous Reservation in Condensed Format

Print Rail Reservation in Condensed Format

Print Tour Reservation in Condensed Format

Print Transportation Reservation in Condensed Format

If checked, upon invoicing a reservation for that Travel Category a summary of basic Reservation information is included, rather than a detailed listing of all Reservation and Service Provider level information. This setting may be desired for reservations that you would like to place less emphasis on when printing invoices for your client. For example, if you are invoicing a cruise vacation, you may choose to place a greater emphasis on the cruise reservation and less emphasis on the Insurance, Airport, Hotel, etc.

Here is a listing of the reservation details included if *Print Reservation in Condensed Format* is checked. All other Reservation and Service Provider level data is omitted from the printed version of the invoice.

- *Vendor Name, Traveler Name/s, Start Date, End Date*
- *If Supplier, ARC or Comm Track Show as Paid: Res Amount, This Invoice, Prior Invoice and Balance*
- *If Comm Track Not Show as Paid: Amount Details*
- *Vendor Res Card Remarks*

Note: Branch defaults can be overwritten on an invoice-by-Invoice basis by clicking the *Invoice Format* button on the *Generate Invoice* screen.

Multi-Currency: All three or any combination of these settings may be selected; therefore, check the box or boxes of the currencies that should appear for pricing on an invoice. These settings are only used when Track Res Card Balances is set to Agency Currency.

Example: An agency located in Canada booked a cruise with a US vendor. In the Multiple Currency screen the Vendor currency was entered as $1500 US dollars. The Agency Currency was entered as $1400 Canadian dollars. If the *Show Agency Currency* option was checked, only the Canadian dollars will appear under pricing when the invoice is generated. If both *Show Agency Currency* and *Show Vendor Currency* options were checked, pricing will appear in both Canadian dollars and US dollars. If the client paid for the reservation in a different currency (i.e. Euros) and that amount was entered as the Client Currency on the Multiple Currency screen and all three options where checked, pricing would appear in all three currencies.

Branch Trip Proposal Settings

HEADER/FOOTER - Agencies with multiple branches have the option of setting up just one global header/footer (**Global Defaults|General Setup|Header and Footer|Trip Proposal**) and use the branch merge fields for customization by branch. Settings here at the branch level **override** the global level, if headers/footers have been setup in both locations. If you want to setup a very unique header/footer for this branch that does not pull from the Global Default General Settings, follow the directions for creating Headers/Footers in the **Global Default General Settings|Header and Footer|Invoice** section of this chapter.

REMARKS - *Trip Proposal Remarks* is a table providing you with the ability to capture multiple remarks then select them as desired for printing. To access the table of branch remarks for trip proposals, go to **Utilities|Branch**. Select the desired branch and click *Remarks* under *Trip Proposal Settings* in directory on left. Use *Add, Modify* and *Delete* to create multiple remarks for use when printing. Each remark captured includes a *Description, Free Flow Remarks* (no character limit) and a check box, *Always Print*.

Upon launching all remarks with *Always Print* checked off, print by default, but can be unchecked upon launching. All remarks with *Always Print* unchecked do not print by default but can be checked upon launching. As an example, you may want different remarks printed on your proposals when printing a cruise vs. a package. If so, setup 2 different remarks, one called *Cruise Remarks* and the other called *Tour Remarks*. Leave *Always Print* unchecked, and then select the desired remarks upon launching. There is no limit to the remark entries added to the remarks table.

Default Trip Proposal Remarks: Add unlimited remarks in the form of a table list that agents can pick and choose from depending on the type of reservation. Enter any remarks you want to appear on trip proposals by clicking *Add*.

Always Print: If you want this to always print on a trip proposal, check here. If you want the agent to choose whether it prints or not, leave blank.

Description: Create a description for agents that accurately describes this particular remark.

Remark: Enter the remark you want printed on the trip proposals. Highlight the remark and click *Modify* to edit a remark, or click *Delete* to remove a remark.

Tip: Need to change the order of the remarks as they print on a trip proposal? Rearrange the order by using the blue up and down arrows.

FORMAT SETTINGS - Set Branch trip proposal defaults that can be overwritten on an proposal-by-proposal basis by clicking the *Trip Proposal Format* button on the *Generate Trip Proposal* dialog box:

Default Format: Set the trip proposal default as *Client Quote* (with prices) which launches the trip proposal into a word processor for editing; or *Client Quote Invoice Style* which uses the same format settings as the Generate Invoice feature, but prints a client quote and does not generate an invoice or update trip balances in any way. This format can be printed or e-mailed. If e-mailed, a plain text version is included in the e-mail body and the formatted version is included as a .pdf.

Include Itin/Invoice Remarks: To include itinerary or invoice remarks on the Trip Proposal, check here.

Branch Itinerary Settings

HEADER/FOOTER - Agencies with multiple branches have the option of setting up just one global header/footer (**Global Defaults|General Setup|Header and Footer|Itinerary**) and use the branch merge fields for customization by branch. Settings here at the branch level **override** the global level, if headers/footers have been setup in both locations. If you want to setup a very unique header/footer for this branch that does not pull from the Global Default General Settings, follow the directions for creating Headers/Footers in the **Global Default General Settings|Header and Footer|Invoice** section of this chapter.

REMARKS - *Itinerary Remarks* is a table providing you with the ability to capture multiple remarks then select them as desired for printing. To access the table of branch remarks for itineraries, go to **Utilities|Branch**. Select the desired branch and click *Remarks* under *Itinerary Settings* in the directory on left. Use *Add, Modify* and *Delete* to create multiple remarks for use when printing itineraries. Each remark captured includes a *Description, Free Flow Remarks* (no character limit) and a check box, *Always Print*.

Upon launching all remarks with *Always Print* checked off, print by default, but can be unchecked upon launching. All remarks with *Always Print* unchecked do not print by default but can be checked upon launching. As an example, you may want different remarks printed on your itinerary when printing a cruise vs. a package. If so, setup 2 different remarks, one called *Cruise Remarks* and the other called *Tour Remarks*. Leave *Always Print* unchecked, and then select the desired remarks upon launching. There is no limit to the remark entries added to the remarks table.

Default Itinerary Remarks: Add unlimited remarks in the form of a table list that agents can pick and choose from depending on the type of reservation. Enter any remarks you want to appear on itineraries by clicking *Add*.

Always Print: If you want this to always print on a itinerary, check here. If you want the agent to choose whether it prints or not, leave blank.

Description: Create a description for agents that accurately describes this particular remark.

Remark: Enter the remark you want printed. Highlight the remark and click *Modify* to edit a remark, or click *Delete* to remove a remark.

Tip: Need to change the order of the remarks as they print? Rearrange the order by using the blue up and down arrows.

FORMAT SETTINGS - Branch itinerary defaults that can be overwritten on an itinerary-by-itinerary basis by clicking the *Branch/Profile* button on the *Generate Itinerary* dialog box:

Default Itinerary Format: Set the Itinerary default to *Itinerary No Prices, Day-by-Day Sorted by Depart and Arrive, and Day-by-Day Sorted by Depart Only.* **Note:** When an itinerary will cross the International Dateline, this format option should be selected to insure the Depart and Arrive dates and times are displayed in the correct order for the itinerary.'

Include Itin/Invoice Remarks: To include itinerary or invoice remarks by default when printing an Itinerary, check here.

Branch Trip Statement Settings

HEADER/FOOTER - Agencies with multiple branches have the option of setting up just one global header/footer (**Global Defaults|General Setup|Header and Footer|Trip Statement**) and use the branch merge fields for customization by branch. Settings here at the branch level **override** the global level, if headers/footers have been setup in both locations. If you want to setup a very unique header/footer for this branch that does not pull from the Global Default General Settings, follow the directions for creating Headers/Footers in the **Global Default General Settings|Header and Footer|Invoice** section of this chapter.

REMARKS - *Trip Statement Remarks* is a table providing you with the ability to capture multiple remarks, then select them as desired for printing. To access the table of branch remarks for trip statements, go to **Utilities|Branch**. Select the desired branch and click *Remarks* under *Trip Statement Settings* in the directory on left. Use *Add, Modify* and *Delete* to create multiple remarks for use when printing. Each remark captured includes a *Description, Free Flow Remarks* (no character limit) and a check box, *Always Print*.

Upon launching all remarks with *Always Print* checked off, print by default, but can be unchecked upon launching. All remarks with *Always Print* unchecked do not print by default but can be checked upon launching. As an example, you may want different remarks printed on your trip statement when printing a cruise vs. a package. If so, setup 2 different remarks, one called *Cruise Remarks* and the other called *Tour Remarks*. Leave *Always Print* unchecked, and then select the desired remarks upon launching. There is no limit to the remark entries added to the remarks table.

Default Trip Statement Remarks: Add unlimited remarks in the form of a table list that agents can pick and choose from depending on the type of reservation. Enter any remarks you want to appear on trip statements by clicking *Add*.

Always Print: If you want this to always print on a trip statement, check here. If you want the agent to choose whether it prints or not, leave blank.

Description: Create a description for agents that accurately describes this particular remark.

Remark: Enter the remark you want printed. Highlight the remark and click *Modify* to edit a remark, or click *Delete* to remove a remark.

Tip: Need to change the order of the remarks as they print? Rearrange the order by using the blue up and down arrows.

FORMAT SETTINGS - Branch trip statement defaults that can be overwritten on an trip statement-by-trip statement basis by clicking the *Branch/Profile* button on the *Generate Trip Statement* dialog box.

Default Trip Statement Format: Set the Trip Statement default to *Include Reservation Detail, Include Applied Balance, and Include Unapplied Voucher Balance.*

Branch Receipt Settings

HEADER/FOOTER - Agencies with multiple branches have the option of setting up just one global header/footer (**Global Defaults|General Setup|Header and Footer|Receipt**) and use the branch merge fields for customization by branch. Settings here at the branch level **override** the global level, if headers/footers have been setup in both locations. If you want to setup a very unique header/footer for this branch that does not pull from the Global Default General Settings, follow the directions for creating Headers/Footers in the **Global Default General Settings|Header and Footer|Invoice** section of this chapter.

REMARKS - *Receipts Remarks* is a table providing you with the ability to capture multiple remarks, then select them as desired for printing. To access the table of branch remarks for receipts, go to **Utilities|Branch**. Select the desired branch and click *Remarks* under *Receipts Settings* in the directory on left. Use *Add, Modify* and *Delete* to create multiple remarks for use when printing. Each remark captured includes a *Description, Free Flow Remarks* (no character limit) and a check box, *Always Print*.

Upon launching all remarks with *Always Print* checked off, print by default, but can be unchecked. All remarks with *Always Print* unchecked do not print by default but can be checked upon launching. As an example, you may want different remarks printed on your trip statement when printing a cruise vs. a package. If so, setup 2 different remarks, one called *Cruise Remarks* and the other called *Tour Remarks*. Leave *Always Print* unchecked, and then select the desired remarks upon launching. There is no limit to the remark entries added to the remarks table.

Default Receipts Remarks: Add unlimited remarks in the form of a table list that agents can pick and choose from depending on the type of reservation. Enter any remarks you want to appear on trip statements by clicking *Add*.

Always Print: If you want this to always print on a trip statement, check here. If you want the agent to choose whether it prints or not, leave blank.

Description: Create a description for agents that accurately describes this particular remark.

Remark: Enter the remark you want printed. Highlight the remark and click *Modify* to edit a remark, or click *Delete* to remove a remark.

Tip: Need to change the order of the remarks as they print? Rearrange the order by using the blue up and down arrows.

FORMAT SETTINGS - Branch receipt defaults that can be overwritten on an receipt-by-receipt basis by clicking the *Remarks* button on the *Generate Receipt* dialog box:

Default Receipt Format: Set the Receipt default to *Include Remarks in Voucher Remarks or Include Remarks in Payment Remarks.*

Set Up User Login Permissions

Your database quickly becomes a valuable asset to your agency. The unique value of your database creates a need for security. *ClientBase* allows you to control the access to the database for every user. The “front door” of the program is locked - only an assigned login name and password allows entry to the database. Once inside, the pre-set security options for the user name and password allow the owner or administrator to control what tasks the agent can or cannot perform.

User logins are setup to define who has access to what areas in your database and to establish defaults that might be unique to each user. They are created when the owner or administrator is signed in as SYSDBA. Go to **Utilities|User Login|User List** to view the current list of user logins.

Special Note: Before setting up the user login permissions, it is suggested that you modify the *Group Security Levels* by going to **Utilities|User Login|Group Security Levels** which acts as a **master** for some of the default settings. Follow the directions as listed below to do this. That way you’ll have less to edit when you want the same permissions for more than one user in this section. We have provided you with some suggested default "masters," but you can certainly modified the master or create new masters for your use.

The only user login that provides access to the user list is the SYSDBA (System Database Administrator) login. When Client Base is initially installed, this SYSDBA login comes with the default password that is sent to you with your startup e-mail. It is highly recommended that the agency administrator change the password to one that only he/she knows, so others cannot modify the system. Remember, when you change it in *ClientBase*, you are also changing it for *Trams Back Office* users, as they share one database. **Caution: When you change the SYSDBA password, you no longer have a password as a "key" that *Trams* support can help you with. DO NOT FORGET THIS PASSWORD when changed!**

Important: Set up your branch and make sure you have created agent profiles for each user. The agent profile needs to be linked to the correct branch. You will be using that agent profile to link to the user login.

***ClientBase* Online Users:** CBO passwords are independent from *ClientBase Windows* passwords. In other words, a password change in one system will NOT change the other and vice versa. Remember however that CBO password must meet the stronger requirements:

Medium Strength - Passwords must contain:

- A minimum of 7 characters
- A maximum of 8 characters
- At least one alpha character (a-z, A-Z)
- At least one numeric character (0-9)

- Cannot be a repeat of last 4 passwords

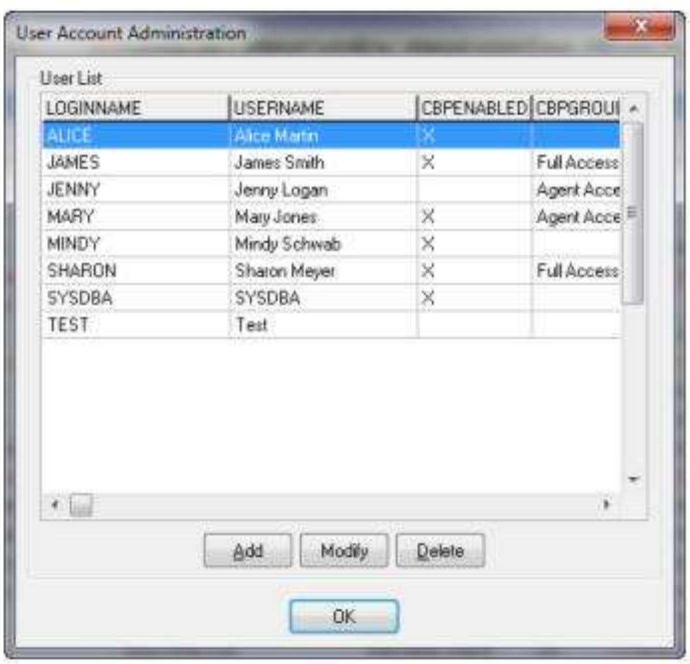
High Strength - Passwords must contain:

- A minimum of 7 characters
- A maximum of 8 characters
- At least one lower case alpha character (a-z)
- At least one upper case alpha character (A-Z)
- At least one numeric character (0-9)
- At least one special character (!,@,#,$,%,^,&,*,_,-,+,= etc.)
- No character may be used more than once, regardless of case
- Cannot be a repeat of last 4 passwords

If a new user with a new password is created in *ClientBase* Windows, it will sync to *ClientBase* Online they can use that password to initially log in to *ClientBase* Online. However, if the password doesn't meet the strength criteria, it will force user to change to a new password.

If they update the password of an existing user in *ClientBase* Windows, it will not update the password in *ClientBase* Online. This also works in the reverse. If they change a password in *ClientBase* Online and want to use the same password for that user in CBW, they will have to set it up again on the *ClientBase* Windows side.

The SYSDBA can update the security database to add, modify or delete users or a group of users' configurations.



Add: Click *Add* to add a new user. A *User Setting* dialog box is displayed.

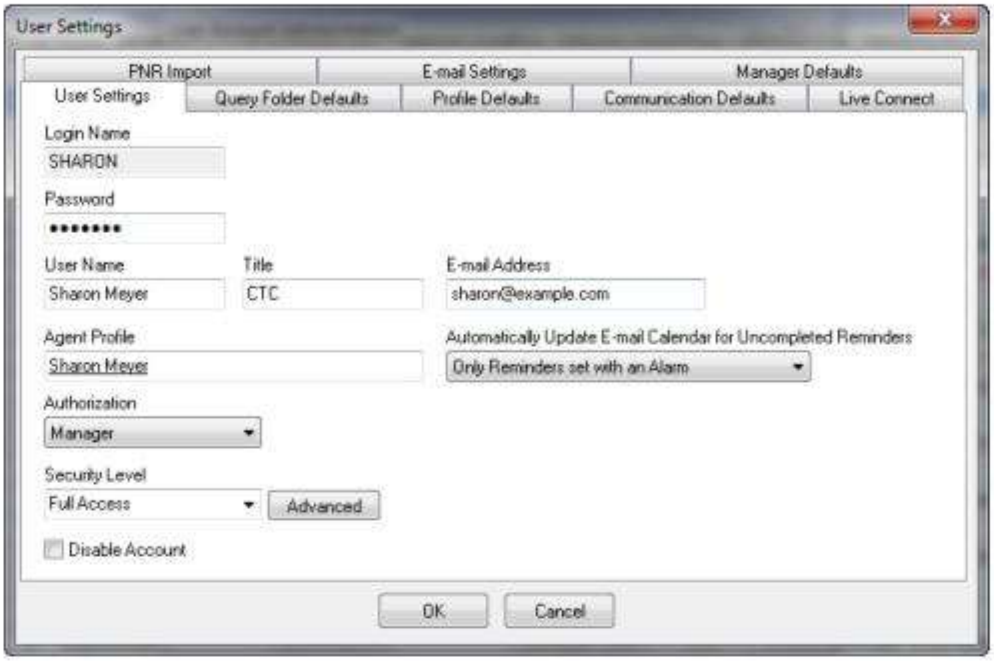
Modify: Click *Modify* to change the settings of an existing user login. The login name is dimmed. Depending on the user, modification may only be necessary if the agent, for example, has changed job responsibilities or has gone on vacation. When you have made the proper modifications, click *OK*.

Delete: Click *Delete* to remove a user from the login list. If you delete this profile in error, you have to re-enter the information again. If you prefer, you may check the *Disable* area to deny access.

Hint: It is suggested that you only use the SYSDBA login to setup security, and that you create a unique login for other work that you do in *ClientBase*. That way any profiles, reminders, or Res Cards you create, are stamped with your user login rather than SYSDBA. Also setup individual logins for each agent.

USER SETTINGS

The next screen captures the very basic elements of a user login.



Login name: Name that is used to log into *ClientBase*. This should not include any spaces in the user name and should be fairly short in length. This field is NOT case sensitive.

Note: The *Trams Back Office* password and the *ClientBase* password for the same user name are the same, REGARDLESS of whether or not it is in the same database. The password is located on the Interbase server computer and NOT in the database.

User Password: The password for this user only. This is an alphanumeric field, which means you can use a combination of numbers and letters. Choose a password that is easy for the user to remember, but not so simple as to allow someone else to login as this user. The password has a mask of *** so the password is hidden when typed. In this screen, regardless of the length of the password, the *** always shows 7 characters.

Note: If a User Password is reset via *ClientBase*, the password is automatically reset in both *ClientBase* and *ClientBase* Browser/CBO Sync users which includes a *Forgot my Password* feature that will reset the User Password automatically. *ClientBase* Browser/CBO Sync users also now includes the ability to *View Your Own Login* which includes the ability to modify your Login Password. If the User Login password is changed through CBB/CBO Sync via either of these methods, then the CBB/CBO Sync login password will remain different than the *ClientBase* login password until the password is resaved within *ClientBase*.

User Name: User's full name. This field, the *User Title,* and the *E-mail* fields can be used in document templates.

Title: Job title of the new user.

E-mail Address: E-mail of the new user.

Agent Profile: Associates the user with a specific agent profile and stamps transactions with the agent's information, thus, eliminating the need to manually add agent information each time. An audit trail of the agent's activity is available as a result. Type in a few letters of the agent profile and choose from the drop-down. (Did you create an agent profile and link it to a branch? You must do this first.)

Automatically Update E-mail Calendar for Uncompleted Reminders: Enable the ability to update an E-mail calendar with Reminders created in *ClientBase*. Select from the drop-down:

Never: Reminders are never sent to the e-mail calendar.

All Reminders: All Open Reminders are sent to the e-mail calendar.

Only Reminders set for a Time - Only Open Reminders with a selected Start Time are sent to the e-mail calendar.

Only Reminders set with an Alarm - Only Open Reminders with the Set Alarm Box checked are sent to the e-mail calendar

The user's e-mail address is used for sending Reminders to the E-mail Calendar. If the user does not have an e-mail address entered in their User Settings, *Never* is the only setting that can be entered for this field.

When creating or editing reminders a new checkbox, *Update E-mail Calendar after Saving Changes* was added. When checked, updates are sent to user's e-mail address. This box is checked by default when the setting from User Settings is *All Reminders* or *Only for Reminders when time is set*.

Upon saving the Reminder, an e-mail is sent to the user. If the *Default E-mail Client setting is Outlook/MAPI Client or MAPI Client*, the e-mail includes the e-mail appointment setup screen as an attachment. Open the attachment and click *Save and Close* to save the Reminder to the e-mail calendar. If *Default E-mail Client setting is SMTP*, the e-mail appears as a meeting request and includes a link to the Activity. Click *Accept* to save the Reminder to the e-mail calendar.

Authorization: This field defaults to *User* but includes an option of *Manager.*

Security Level: Select the desired security level from the pull-down menu where the permissions have been already established or click *Advanced* to customize the settings for each particular user. The system comes defaulted with three group security levels. Add as many group security levels as you want, however. (See next section for details on how to add or modify group security levels.)

1. Agent: *ClientBase* comes with a default agent security profile. This is a sample of a recommended set of security rules for your agent already prepared by *Trams* which can always be modified for each user login.

2. Full Access: Access made available to the owner or administrator of the agency.

3. Read Only Access: This access might be appropriate for a new contact during their probationary period or a temporary contact covering as vacation relief.

Disable Account: Placing a checkmark in the box denies the agent access to the program. The sign-in is no longer valid. This box is checked when the agent name cannot be deleted because there are entries pointing to that name in the database. Since *ClientBase* shares a database with *Trams Back Office*, you see TBO users on the user list. Uncheck *Disable Account*, if you want the TBO users to access *ClientBase*.

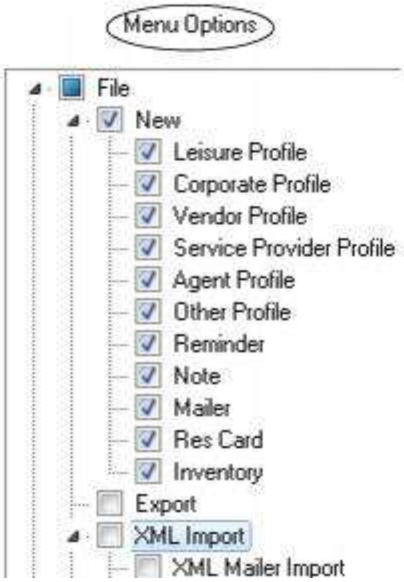
Advanced Security Level

Profile/Activity/ResCard: Select from a drop-down list of choices to determine this agent’s ability to read, write and delete profile, activity, Res Card and inventory records captured in your database. *Read Only* allows the agent to view the record only. *Read/Write* allows the agent to view and modify the record, but not delete the record. *Read/Write/Delete* permits the agent to view, modify and permanently remove the record.

Branch Rights: Limit which branch records a specific user login can access. Keep in mind that if branch access is limited, then duplicate profiles may be created as a result of not locating profiles accordingly. We recommend use of this feature only if clients do not contact your agency across your branches. Check the box *Limit User Branch Access*, then select from the listing of branches which branches this user **CAN** access. Click *OK*.

If a user login has been limited to view only a particular branch/es, then when Querying in the Profile Manager, Activity Manager or Res Card Manager, those branches with permission are always being included within the Query filters and only those records linked to the branch/es with permission appear in the results. Profiles must be linked to the branch/es with permission when Querying the Profile Manager. Activities must be linked to a profile that is linked to the branch/es with permission when Querying the Activity Manager. Res Cards must be linked to the branch/es with permission when Querying the Res Card Manager.

Menu Options: Allows the SYSDBA to further restrict permissions to select menu items within the database. For example, you may not want to grant a new user the ability to change the global default settings. In that case, you would uncheck the box next to Global Defaults, so the user cannot access the Global Default menu option. If you want to give an agent access to all global default settings except Marketing Codes, the Global Defaults box would remain checked but the Marketing Codes box would be left unchecked. Every menu option available to *ClientBase* is listed here for you to enable or disable for each agent.



Profile Tabs: Each profile type is made up of several folders, or tabs of information. To provide you with the utmost flexibility, each tab for each type of profile can enabled or disabled for viewing for each user. Click the down arrow and remove the check from any tab of information you do not want this agent to view.

Other Restrictions: By placing a check in front of any of these items, the agent is granted or not granted access to that area of the database. For example, by checking *View Own Profiles* only, users is can only see their own client profiles including their own agent profile.

Disable Profile Manager: Click here to hide Profile Manager.

Disable Activity Manager: Click here to hide Activity Manager.

Disable ResCard Manager: Click here to hide Res Card Manager.

Disable Inventory Manager: Click here to hide Inventory.

Disable Dashboard: Click here to hide Dashboard.

View Own Profiles Only: Click here if you want agents to view their own profiles only.

View Own Activities Only: This setting has two options:

1) View Own Activities Using - Activity Login Name: Use this setting to allow users to only view activities where they are listed as the Login Name on the activity.

2) View Own Activities Using - Profile Primary Agent: Use this setting to allow users to view activities of profiles where they are the Primary Agent of the profile the activity is attached to, regardless of who is listed in the activity for the Login Name. For example, an activity has user Mary Smith as the Login Name, however Susan Jones in the primary agent of the profile the activity is attached to. Using this setting Susan is allowed to view the activity.

View Own ResCards Only: Click here if you want agents to view their own res cards only

Disable Printing from the results of a Query: Click here if you do not want agents to Query up profile information and then print.

Disable Change Primary Agent Field of Existing Profiles: Click here if you do not want agents to change the primary agent on profiles.

Disable Change Global Profile Manager Folders: Click here if you do not want agents to change format of Profile Global folders.

Disable Change Global Activity Manager Folders: Click here if you do not want agents to change format of Inventory Activity folders.

Disable Change Global ResCard Manager Folders: Click here if you do not want agents to change format of ResCard Global folders.

Disable Change Global Inventory Manager Folders: Click here if you do not want agents to change format of Inventory Global folders.

Disable Ability to Generate Invoice: Click here if you do not want agents to generate invoices.

Disable Ability to View invoices in MS Word: Click here if you do not want agents to change invoice totals, wording in Microsoft Word.

Disable Refunding an Invoice from Res Card: Click here if you do not want agents to do refunds.

Disable Ability to View Agent Commission when Invoicing: Click here if you do not want agents to see other agents' commission totals or percentages coming from TBO agent profile tables.

Disable Change Profile Create Date and Profile Create User; Click here if you do not want agents to change the Profile Create Date or User on a profile.

Disable Ability to Issue Receipt: Click here if you do not want agents to issue receipts.

Disable Client Credit Limit Balance and Available in QuickView: Click here if you do not want agents to view client's credit limit balance and available credit in QuickView.

Allow Invoice override for exceeding the Client Credit Limit: Click here if you want agents to override client's credit limit when invoicing.

Disable Ability to View Profiles of Profile Type Other: Click here if you do not want agents to see *Other* profile types (these are your gas company, landlord, etc.).

Disable Ability to View Full Credit Card Numbers: When this setting is checked the program will prompt with message *By checking <u>Disable ability to view full Credit Card Numbers</u> for this User, Credit entries will not be included in Merge to PNR and Live Connect, since the full Credit Number must result at the end of these features."*

Also, when this setting is checked, only the masked version of the credit card number is shown in the following locations in the system:

Profiles - Cards Tab

Res Card - Reservations|Payment Due Date Tab

Invoicing Screen - Invoice Payment Section

Merge to PNR Selection Screen

Merge to PNR Preview Screen

Live Connect Screen

When *Disable ability to view full Credit Card Numbers* is unchecked, a masked version of the credit card number is shown in all areas above with the following exceptions:

1) Profile - Cards Tab: Clicking *Modify* will show the masked credit card number with a button *View Full Number*. When this button is clicked to view the full credit card number user is prompted, *Do you really need to see the full credit card number? To keep customer data safe you should minimize the number of times sensitive data is visible. Keep in mind that your access will be logged.* Click *Yes* to continue and view the full number. This will also create an Edit Log documenting the User who viewed the number, the Date and Time the number was viewed, and a Description (noting that credit card number was viewed). Click *No* to remain on the screen with the masked version.

2) Merge to PNR data sent (whether clipboard or API) will send the full credit card number.

3) Live Connect data sent will send the full credit card number.

Click *OK* to save any changes.

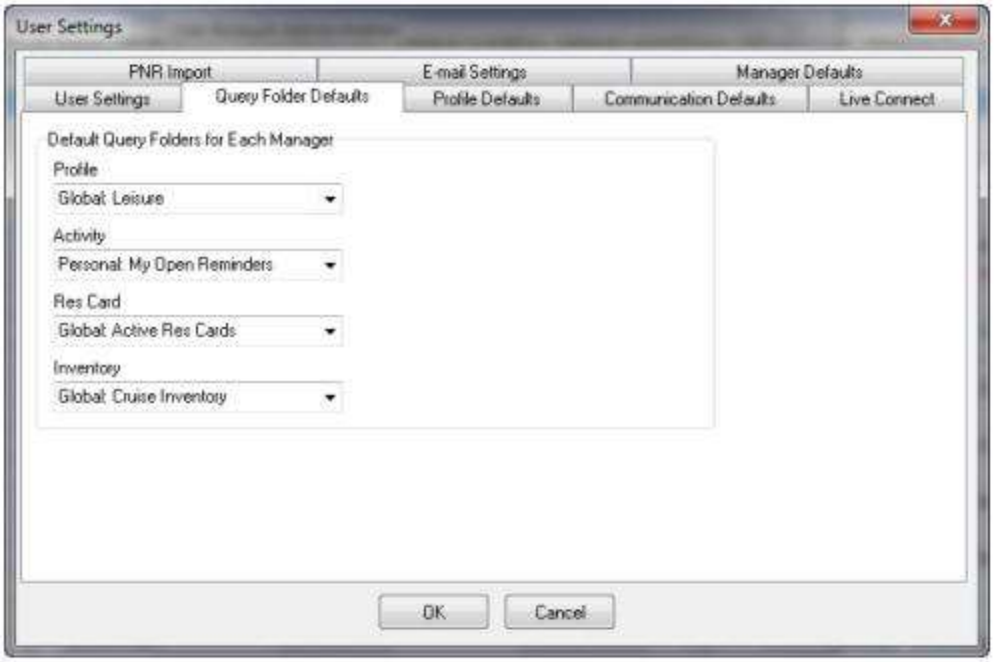
Note: There are suggested defaults in the program. Need help deciding what to grant access to? E-mail **Trams.Implementation@sabre.com** for help.

Disable Voucher Form of Payment: When unchecked, an agent is able to see Total Voucher Balance on both the profile and invoicing screen and has the ability to apply the balance against invoices. This setting is unchecked by default and therefore you must check the box to disable the feature for any user you do not want to perform this function.

Users in Group: Users tagged with a particular security level when their User Logins were setup, are visible in this read-only area for your convenience.

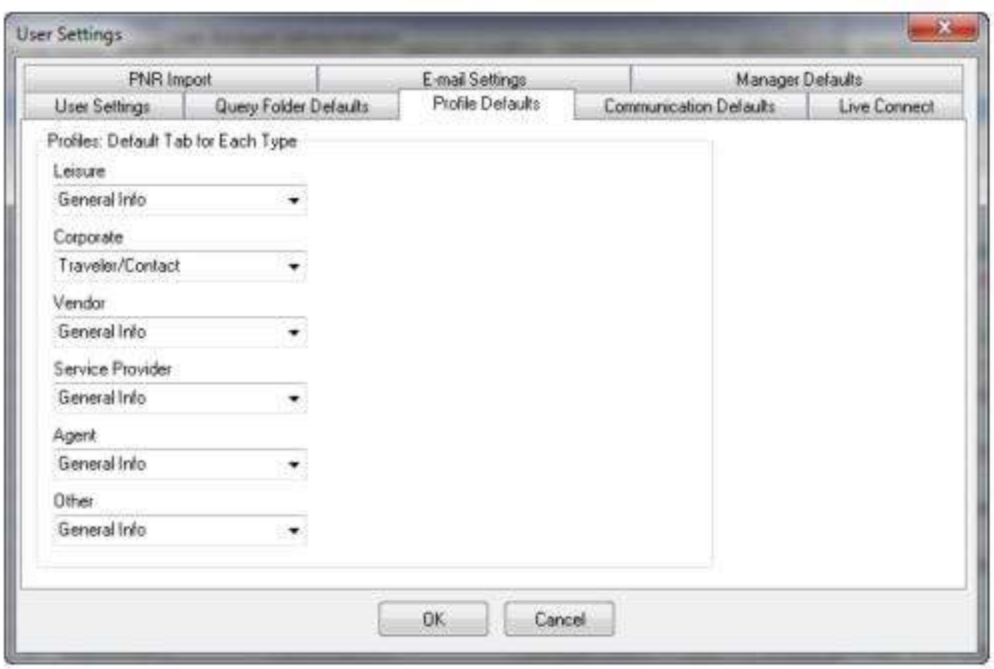
Note: If you have linked a user login to a specific security level and make modifications to that level for this user login only, the security level then defaults to *Custom.*

Query Folder Defaults



Each file manager (Profile, Activity, and Res Card) comes with a default set of folders, which represent a stored set of Query filters. In addition to the default folders, your agency and agents can create their own custom folders. This area of the user login allows you to identify which folder should be opened by default (within each manager) when first signing into *ClientBase*. Choose from the drop-down menu the types of transactions you want to see when first entering *ClientBase* with this login.

Profile Defaults

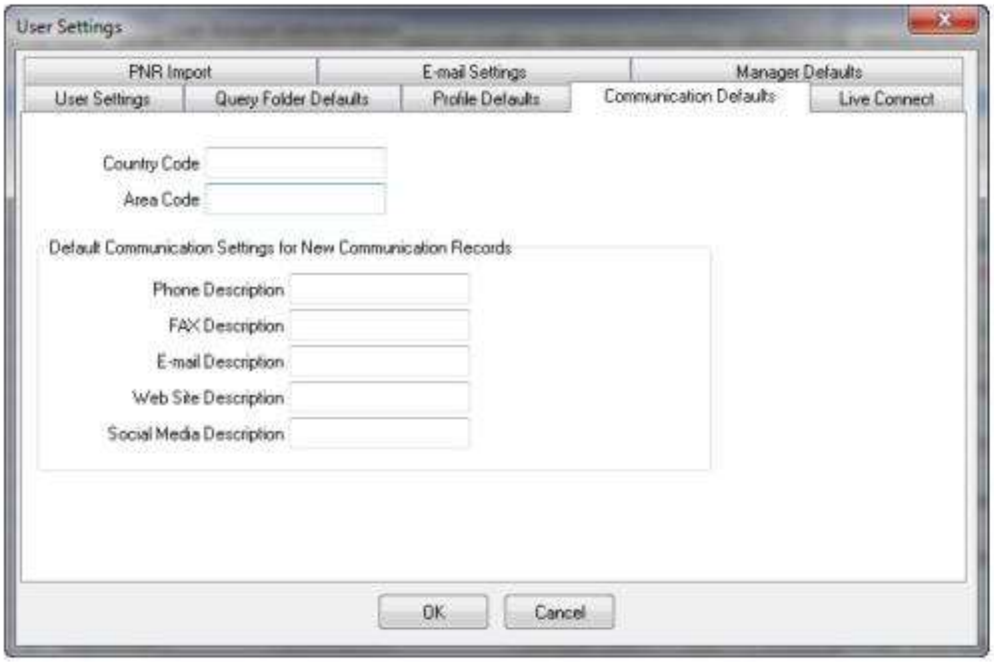


Each profile type is made up of several folders or tabs of information. Under Profile Defaults, select which tab first appears when viewing each type of profile. For example, you may want your agents to see marketing information first thing, every time they retrieve a leisure client profile. If so, click the down arrow next to Leisure and select Marketing.

You can select any folder for any profile type.

Communication Defaults

The agency is no longer confined to its four walls. With so many outside agents and contacts working from distant locations, customers come with many different area codes and even from different countries. Agent users have the opportunity to save default phone information as part of their log in. **Note:** If this screen is left blank, then information that is listed under Global Defaults is used.



SETUP IF DEFAULT COUNTRY CODE IS NOT 1

Default logic looks at User communication defaults for Country Code and Area Code and uses additional logic for defaulting the Country Code and Area Code in the phone format window under these conditions:

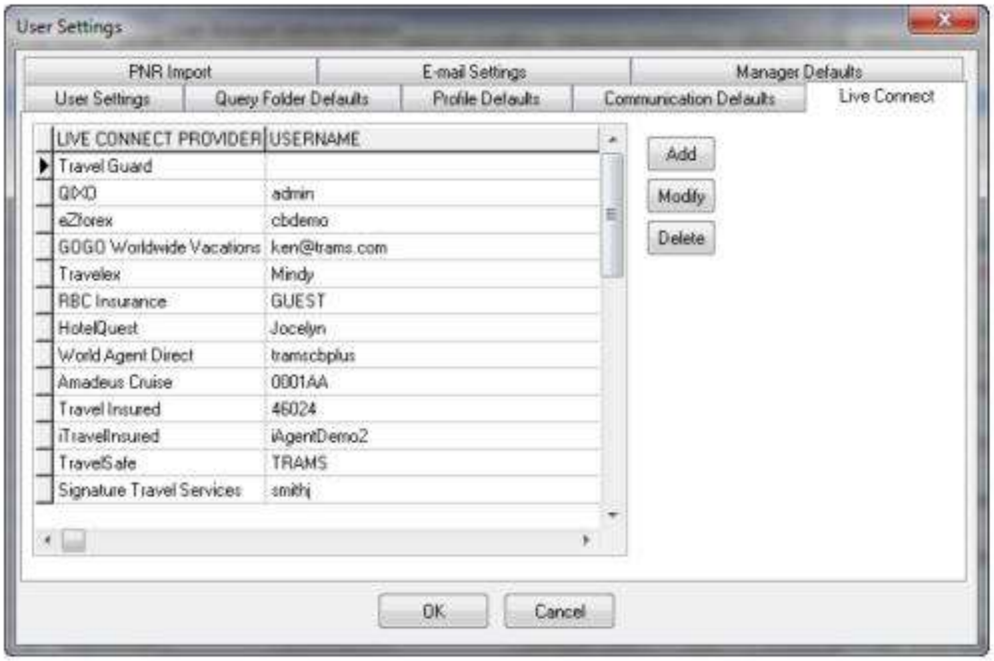
**If the number entered into the phone field does not start with both a country code and area code, the digits entered default into the entry field and the User or Global communication default populates the Country/Area Code. Example: If User/Global communication default is 63 for the Country Code and 9 for the Area Code, a new phone number entered as 5551212 is saved as +63 (9) 5551212.

**If the number entered into the phone field does not start with a country code, but does start with an Area Code, the area code lands in the area code section, remaining digits land into entry field and the User or Global communication default populates the Country Code. Example: If User/Global communication default is 63 for the Country Code, a new phone number entered as 95551212 is saved as +63 (9) 5551212.

**If the number entered into the phone field starts with same numbers in the User or Global communication defaults, then the number is parsed out accordingly into Country Code, Area Code and Entry. Example: If User/Global communication default is 63 for the Country Code and 9 for the Area Code, a new phone number entered as 6395551212 is saved as +63 (9) 5551212.

**If phone entry does not start with "1" a dash is not entered in the entry.

Live Connect Settings



This set-up area is for agencies who want to use Live Connect in the Res Card. Save time and improve efficiency by transmitting selected client information to the booking engine (Live Connect Provider), then electronically transmitting back reservation details and automatically complete the reservation form with what's been booked. Proceed to generate client quotes, itineraries, invoices, and trip statements.

Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Setting Up Global Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select from the drop-down list.

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you by the Live Connect provider.

Setting up Individual Login Information: To set up Live Connect for **each** user login, click on the Live Connect tab in the User Setting. Click *Add* to add a Live Connect Provider User. **Tip:** Each agent can do their own Live Connect password setups under **Utilities|MyLogin.**

The Live Connect Provider is the "*Booking Engine"* for many vendor sites. You must sign up with any Live Connect Provider you want to use to obtain the unique user name, password, and account number used below. See *An In-Depth Look at Live Connect* for details on signing up for any Live Connect booking engine. **Note:** You can setup these settings globally by going to **Global Defaults|Res Card Defaults|Live Connect Login.**

Live Connect Provider: Only a Live Connect Provider which is available for your use is listed on the drop-down menu list. Select one.

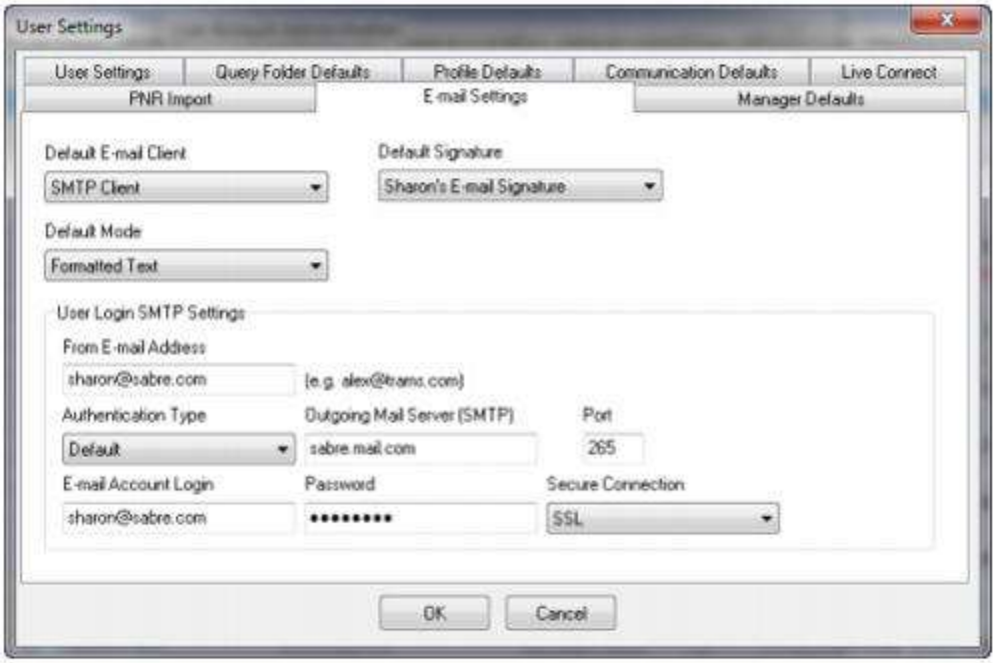
User Name: For each Live Connect Provider, enter the unique user name assigned to your agency when you registered.

Password: For each Live Connect Provider, enter the unique password assigned to your agency when you registered.

Account Number: For each Live Connect Provider, enter the unique account number assigned to your agency when you registered.

(For a complete overview of use Live Connect, please refer to the chapter *An In-Depth Look at Live Connect*.)

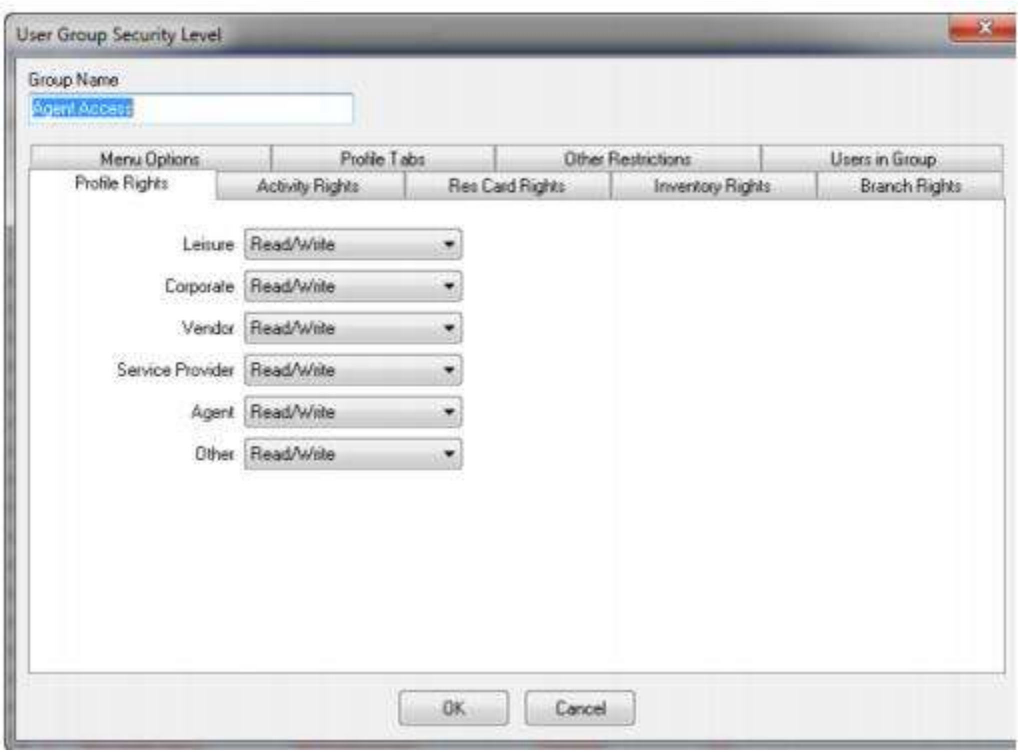
E-mail Settings



There are two e-mail options available for using *ClientBase*'s Merge to E-mail feature, **MAPI** (Messaging Application Protocol Interface) and **SMTP** (Simple Mail Transfer Protocol). (For a complete overview of use of SMTP versus MAPI, how to setup and how to use, please refer to the chapter *E-mail Marketing in ClientBase*.) You can also select from the drop-down a default e-mail signature if this has been set up under *Global Defaults*. **Note:** These settings can be overwritten in *Workstation Defaults* or in *Utilities|MyLogin.*

Group Security Level

Using the group security setting minimizes the time required to set the security levels when you want the same permissions for more than one user. If you decide to make a change to agent security and they are linked to an agent security level, by changing the group security level for agents in this area, each user login will automatically be updated with changes you make. Follow the easy steps below to establish the same security level (a master) for more than one user.



1. Under **Utilities|User Logins|Group Security**, click *Add* and give the group a name, for example, Outside Agents or Agent Supervisors or click *Modify* to edit the defaults.)

2. Complete each of the tabs to establish the default permissions for this particular security level.

3. Go to **Utilities|User List**. Click *Add.* Complete the fields for *User Name, Password and Profile.* From the pull-down menu for security level, select the name of the group for which you have pre-set the default permissions.

Note: Selecting a security level group simply defaults the permissions accordingly. You can change any of the permissions for just this user without affecting anyone else with this security level.

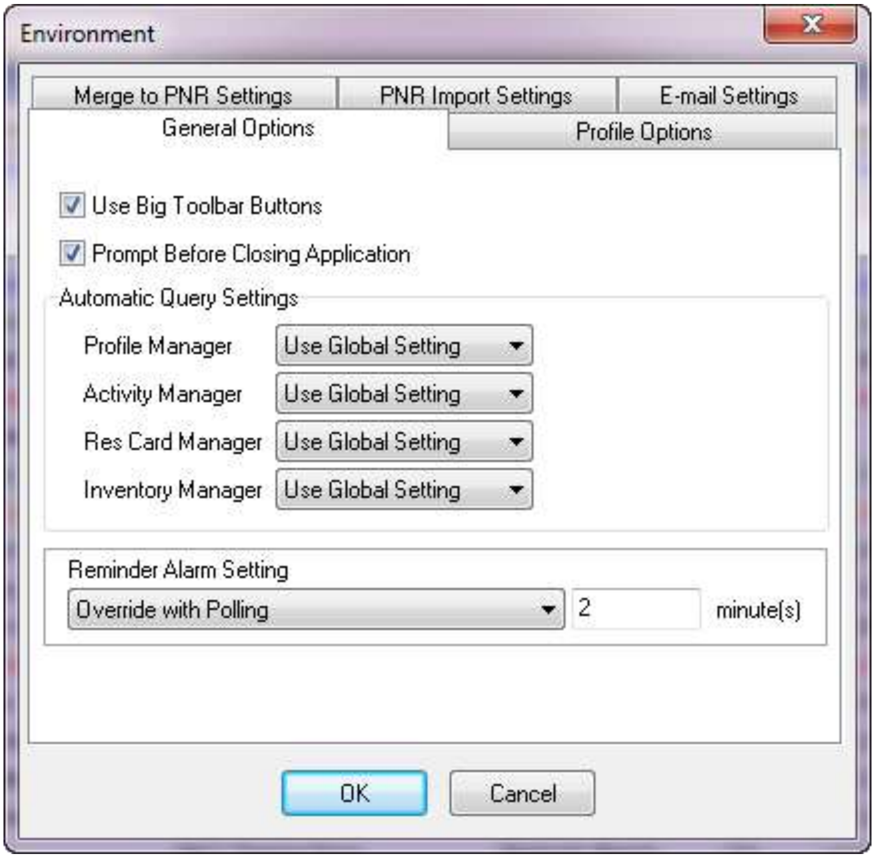
4. Complete the Query folder defaults and profile defaults. Click *OK*.

The permissions established for a group security level can be modified at any time and retroactively modify the permissions for any user login pointing to that group security level created to-date.

Tip: It's a good idea under the Menu items in the Utilities to let users have permissions for *My Login.*

Setting Up Workstation Level Options

Environment



ClientBase was designed with optimal performance in mind. Since speed is a critical issue for *ClientBase* to be effective, certain processes in *ClientBase* can be designated as automatic or manual at the workstation level.

GENERAL OPTIONS TAB

In the ***General Options*** tab, designate whether user wants big toolbar buttons, or a prompt before closing out of *ClientBase*. By default the automatic Query settings have been enabled and can be changed at the global level, but can be overwritten in here. For each manager, select if you want to *Use Global Settings, Enable Automatic Queries,* or *Disable Automatic Queries.* Remote users who connect to the *ClientBase* database need to disable automatically queries here and under the ***Profile Options*** tab so they get optimum performance.

Also globally setup is the way alarms are sent to the workstations. *ClientBase* uses the *IB Events* tool in Interbase to enable the server to automatically distribute alarms it detects to the workstations. By default this tool is activated globally. Some remote workstations, however, may have trouble getting alarms because of firewalls or the newest security measures Microsoft Windows has in place. For this reason, you have the ability to disable *IE Events* that were setup for you globally, or to set this tool to *Polling* (suggested). With *Polling*, you can select to have the workstations poll (or Query) the server for any alarms periodically to send these alarms to them. By default we suggest the *Polling* be set to every 2 minutes, but you can change this duration if you so choose.

PROFILE OPTIONS TAB

By default the automatic Query settings for profile options have been enabled and can be changed at the global level, but can be overwritten in here. Under ***Profile Options*** for Profile Indicators, Travel History and Payment History, select if you want to *Use Global Settings, Enable Automatic Queries,* or *Disable Automatic Queries.* Remote users who connect to the *ClientBase* database need to disable automatically queries here and under the ***General Options*** tab so they get optimum performance.

MERGE TO PNR SETTINGS

Under the ***Merge to PNR Settings***, the workstation settings override the Global Defaults PNR settings, if selected. This area includes drop-down lists of choices including *Use Global Settings, Use Clipboard, or Use API.* By default all workstation defaults are set to *Use Global Setting*, but can be overwritten on a workstation-by-workstation basis.

PNR IMPORT SETTINGS TAB

The ***PNR Import Settings*** tab is used to input settings for use with our PNR import feature in the Res Card. Nothing needs to be setup in this tab at the workstation level. The *Use Local Files for PNR Import* is for *Trams* testing only.

E-MAIL SETTINGS TAB

Click the *E-mail Setting Tab* to override the current user's e-mail settings and assign a unique set of settings specific to a workstation. Only enter settings in this area to overwrite the settings for the current user, otherwise select *Ignore* from the drop-down menu. If settings are entered, the merge to e-mail feature from this workstation uses these settings rather than those in the user login. Notice a setting to default the number of e-mails processed before a re-connection to the SMTP server is established. This feature can be disabled if the value is set to 0. (For a complete overview of use of SMTP versus MAPI - how to setup and how to use - please refer to the chapter *E-mail Marketing in ClientBase*.)

Spell Checker

Several dictionaries have automatically been installed onto each workstation running *ClientBase* providing you with the ability to identify misspellings within Document Templates, Formatted Text E-mails, and Profile Remarks. By default, while typing within any of these three areas, the spell check feature automatically underlines each misspelled word. Right-click on a misspelled word and you will be offered suggested spellings along with the ability to *Ignore, Ignore All* or *Add* to Dictionary. In addition a Spell Check button, labeled *ABC* has been added to the toolbar of each of these features (Document Templates, Merge to E-mail and Profile Remarks) allowing you to run the spell check routine across all data captured.

CUSTOMIZING SPELL CHECK UTILITY:

Although the spell check utility is automatically activated within Document Templates, Merge to E-mail and Profile Remarks, you can customize your spell check settings by going to **Workstation Defaults|Spell Checker**.

Dictionaries: Several different language dictionaries have automatically been installed, although by default only the General English dictionary as been enabled. From this area, *Add, Enable, Disable* or *Remove* dictionaries. **Note:** All dictionaries have been installed within the **My Documents*Trams*\Dictionary directory**.

User Dictionaries: A blank user dictionary is also automatically installed where you can customize the dictionaries used when running spell check to include words not currently in the General Dictionaries. When running spell checker if a word not recognized is *added to dictionary*, the word is saved within this *User Directory*.

Options: By default the spell checker is set to *Ignore ALL CAP words*, *Ignore Words with Numbers*, and *Highlight misspelled words*. Remove the check from these settings to change the default.

TOOLBAR BUTTONS

ClientBase gives the option of selecting big or small icons on your toolbar. This selection can be made from **Workstations|Toolbar**. Click *Big Buttons* or *Small Buttons* and the toolbar is adjusted accordingly.

Chapter 4: Import Profiles from Other Sources

This section details the importing of Client, Vendor, Agent and Other profiles from other software programs using ASCII (.txt) files. The routine of importing either appends one database of profile information to an existing database (or an empty one) without checking for duplicates, or updates existing profiles if certain parameters are setup.

Importing Customer Profiles via ASCII (.txt) Files

Agencies may use many different software programs to maintain customer data such as names, addresses, phone numbers and marketing information. Ideally, most agencies implementing *ClientBase* prefer to electronically "import" customer information to the *ClientBase* profiles rather than manually re-entering it. Later, when the *ClientBase* database is up and running, agencies may want to import other miscellaneous electronic files as well, such as a purchased mailing list. Although *ClientBase* can't anticipate every possible program used, if your agency has a database of customer information in a program that can put that information into an ASCII (American Standard Code for Information Interchange) file (.txt), chances are an electronic "import" is possible…and easy!

ASCII Delimited Text Files

Regardless of the specific program used to maintain your database, if the program can create an ASCII-comma or tab delimited file (and most programs currently can using **File|Save As** or **File|Export**), that file can be imported using the *ClientBase* Import/Update Utility. An ASCII format uses a standardized coding scheme enabling different computer programs to exchange information.

Each record in the file includes information such as Name, Address 1, Address 2, City, etc. To recognize when one field ends and another field begins, a *delimiter* is used, separating each field. This delimiter is a character and the most commonly used are a **tab** or a **comma**.

If your existing database program can create an ASCII file, create your file and save it to a floppy disk or to a drive accessible to a workstation that can run *ClientBase*. (The file must be created **prior** to running the *ClientBase* import program.) Find instructions on creating the file from the vendor supporting that software program.

Using the *ClientBase* Import/Update Utility

The *ClientBase* Import/Update Utility is a separate program that is run from outside of *ClientBase*. To access this utility, go to **Start|Programs|*Trams*|*Trams* Profile Import** and make sure you have a current backup of the database before starting the import. Access the program from your *Trams* program group (where the *ClientBase* shortcut is located), or by going to **Start|Run** and browsing *Trams*\common files\profimp.exe file. Upon running, an import wizard appears.

The wizard guides you though importing different classifications of profile data: address, communication, marketing and traveler. The basic steps to running the import are:

Step 1: Preparing your Database

Step 2: Connect to your Database

Step 3: Select Import File

Step 4: Import Data to Miscellaneous Profile Fields

Step 5: Import Data to Communications Fields

Step 6: Import Data to Address Fields

Step 7: Import Data to Marketing Fields

Step 8: Import Data to Travelers (Passenger) Fields

Step 9: Import Data to Profile Groups

Step 10: Import Data to Special Dates

Step 11: Import Data to Profile Remarks

Step 12: View Profile Import/Update Summary Screen

Before giving details on each step, let’s review some basic concepts used through the Import Utility screens.

Updating Existing Profiles vs. Appending to Database

There are two methods of importing data - update or append. Update means you want to replace data that is currently in your database with new data. An example is John Jones is currently in *ClientBase*. He visits your website and updates his address, letting you know he moved. You import profiles from your website every week into *ClientBase*. Since the profile already exists in *ClientBase*, you want the import routine to find this profile and change the address instead of creating a new profile which would be a duplicate. If the entire import was updates, then the number of profiles would not increase.

Important Note: *As you map the fields from the import file to the fields in ClientBase, it is important to remember that any fields that are being mapped to in ClientBase will be replaced by the value of the field in the import file, even if it is empty.*

Using the append method means you are adding profiles to the database and the number of profiles in the system increase after the import is complete. An example of this is if you purchase a mailing list and want to load all the profiles into *ClientBase* so you can monitor responses and follow up on these profiles.

Three Ways to Import Data

Notice three buttons listed on many of the screens in the Import Utility that are used to describe how that data should be imported.

Map	Mapping is used when a data field exists and is populated in the file while importing. You want to bring the data in “as is” to a field in the database. Select the name of the field that exists in the source file, and indicate in the import wizard into which field you want the data to show in *ClientBase* or *Trams Back Office*.
Constant	Use this feature when using same value for every profile being imported. Going back to the mail list example, you are importing data exclusively for Leisure profiles. Set the Profile Type field as a constant with a value of Leisure. Now all the profiles imported from the mail list show as Leisure profiles In *ClientBase* and *Trams Back Office*.
Rule	Creating a rule to import fields allows you to apply some logic to the field being imported. Create rules that if the data meets certain criteria, then map to a certain field in the database, or set a constant for the field. Let’s say the mail list you have purchased has a field name type and the value in the data source is either Home or Business. You want to make the profiles that are marked "business" as *Corporate* profiles in your database. You create a rule that says if type is equal to “business” then set the Profile type field to *Corporate* when importing the profile into the database. Another rule would be set where if the type is equal to “home” then the set the profile type to Leisure when importing.

Saving and Loading Mappings

If you plan to import profiles on a continual basis using a consistent source file structure, map settings at the end of the import wizard. Also, if you start the mappings, but don’t have time to finish, use *Save Mappings* to save what you’ve done so far. The next time you import a file, load the map which uses the same settings from the saved import. Now you do not have to go through the wizard field by field. Only use this feature when the files you are importing use the same files structure and fields in the same order.

Viewing the Data File

Once you have connected the import wizard with the source file to be imported, the wizard allows you to view the data. Click *View* any time to refresh your memory about the fields or data listed in the source file.

ClientBase and *Trams Back Office* Field Legends

A legend is included on the screens of the import wizard to help you figure out where the data you map is used. Each *ClientBase* field is color-coded so that you know which fields are TFW Only fields (lavender); *ClientBase* only fields (royal blue); or shared TFW & *ClientBase* fields (black).

Step-by-Step Instructions to Importing

Step 1: Preparing Your Database

When you use the import utility, you make permanent and automatic changes and therefore, we suggest you make a good backup of the database before using this feature. In doing so, you are covered in case something is changed unintentionally. By backing up, you have the option to restore back your original database. To back up your database, go to **Start|Programs|*Trams*|*Trams* Back up/Restore**. (See *Backing Up Your Database* and *Procedure for Testing Integrity of Daily Backup* sections in the chapter in this manual entitled, *Tools for Maintaining a Healthy Database.)*

Or, you may decide to setup a "test" Alias to test the import on a copy of your database before you import it live. (This procedure serves another purpose as well as it checks the integrity of the latest backup.) Here are steps to accomplish this:

1. Go to **Start|Programs|*Trams*|Alias Utility**.

2 Create an alias named *Test* and type: C:\Program Files*Trams*\Database\test.ib (older versions it's .gdb). Do not click *Test* as this database does not exist until you restore your backup to it.

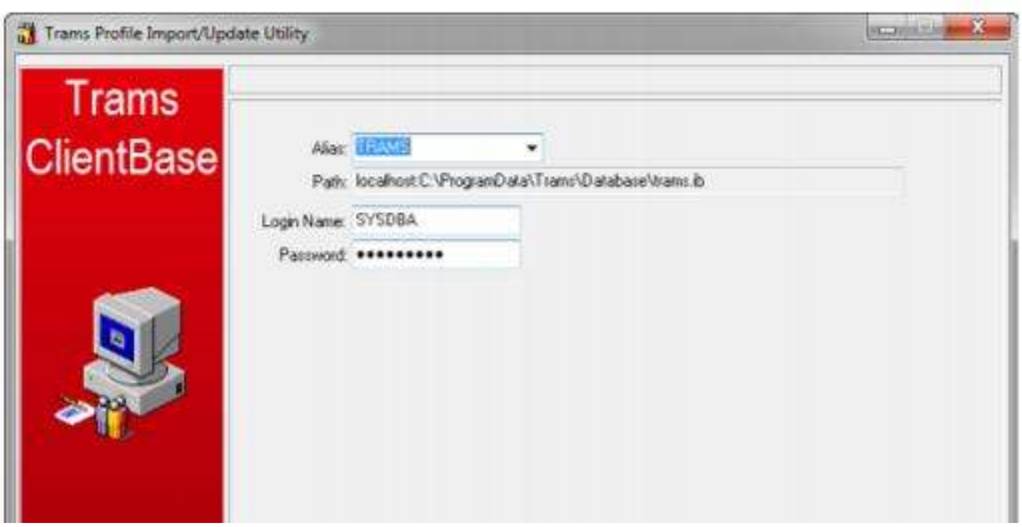
3. Restore the last backup to the *Test* Alias (it creates the new test.ib [older versions.gdb] when it does this). **IMPORTANT:** If you get any error message and cannot complete restore, call or e-mail support for help.

4. Log into *ClientBase* as this Alias, *Test*, and make sure all was restored correctly.

5. If you can look at the details of one profile, the copy of your database is viable and you are ready to do a test import into this database copy.

Step 2: Connect to Database

The first screen in the *Trams* Profile import wizard requires the following information:



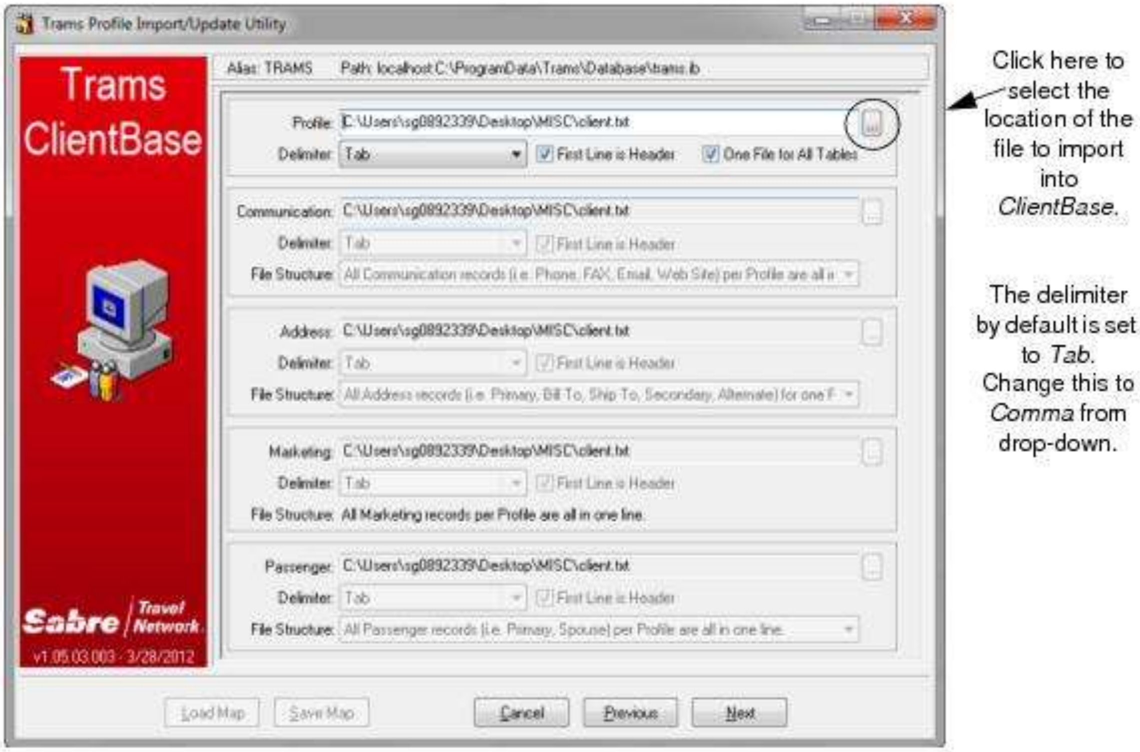
Alias: From the drop-down menu, choose the Alias used when logging into *ClientBase*.

Path: The Alias selected above sets the path to the *ClientBase* database.

Login Name/Password: Indicate the *ClientBase* Login In Name and Password.

Click *Next* to continue.

Step 3: Select Import File



From this screen, select the file that has the profile information to import into *ClientBase*.

Profile: Click the three dots to select the location on your computer or network of the .txt file to import into *ClientBase*.

***Delimiter*:** The default is set to *Tab.* From the drop-down menu, indicate whether the file to import is comma delimited.

***First Line is Header*:** If the first line is a table header, check in this box to read the headers for the file.

***One File for All Tables*:** If this box is checked, all of the data you are importing is in one file. The file updates not only the profile table, but also the communication, address, marketing and traveler tables as well. If this box is not checked, it opens up the ability to import multiple files, each a unique .txt file for each table - profile, communication, address, marketing, and traveler. This setup would be used when the source files are generated from a relational database which has separate tables in a program such as *Access, dBase, or Paradox.* Notice that as the checkmark is removed, the communication, address, marketing and traveler areas become active. For each selected .txt file for any table, specify a *Delimiter* from the drop-down menu (either tab or comma); check the box *First Line is Header* to create a header for the file; and select a File Structure.

File Structure: From the drop-down menu, designate if the .txt file that is being imported contains:

Multiple lines per Profile - This would be when the profile is listed in several rows with different information attached on each row. For example:

1030 John

1030 Smith

1030 123 Main St.

1030 Los Angeles

1030 CA

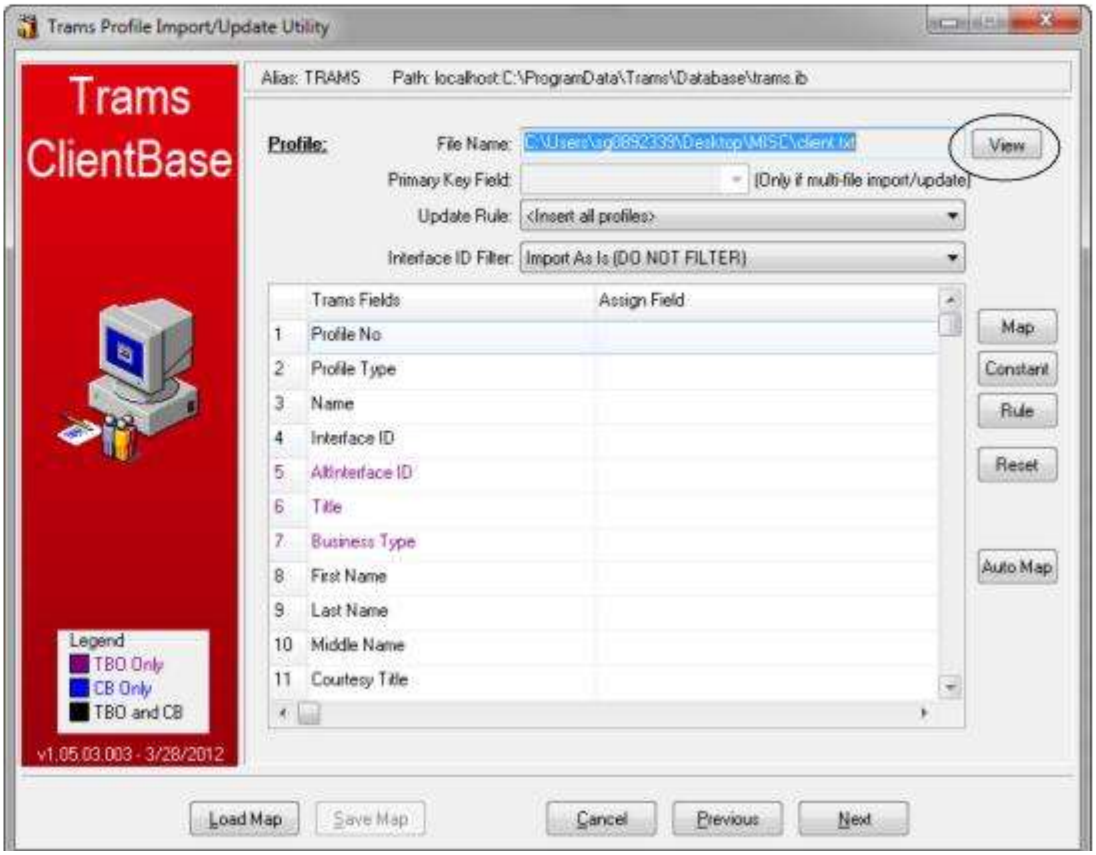
1030 90045

Where 1030 is the profile number or identifier.

All records in one line - This would be a file where for each profile, the specifics are in columns, or separated by comma which span a single line. For example: 1030,John,Smith,123 Main St.,Los Angeles,CA,90045.

Step 4: Importing Data for Miscellaneous Profile Fields

Once the file(s) to import is selected, click *Next* to get to the third screen in the import wizard, Profile Fields. By clicking *View,* preview the file to import. Review the profile data to import into *ClientBase* for accuracy.



This is a very powerful part of the file import wizard. This area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. Map a desired value using fields from the imported text file, assign a constant, or create rules to assign the desired value. The only **required field** in this area, is the Profile Type.

Load Map: Click *Load Map* to retrieve a previously saved mapping session so as not to setup everything all over again. What a time saver!

Primary Key Field: For those users who are bringing in multi-data import files, indicate the primary key field. This is the field that is common to both files that creates a link and tells our utility how to match the data for one profile.

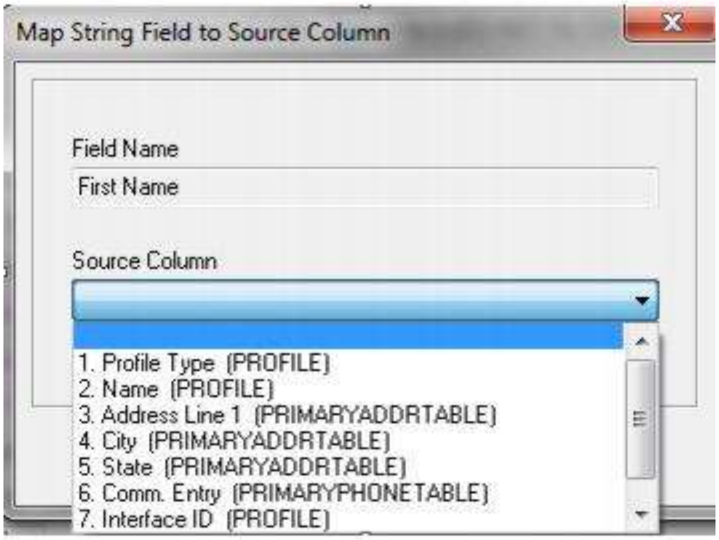
Update Rules: This determines whether the information you are importing is appended to the database or updating existing data. Select *Insert All Profiles* to bring new profiles into *ClientBase*. Select *Update If InterfaceID Matches* to update existing profiles in *ClientBase* when data being imported has an Interface ID that matches an existing profile in *ClientBase*. Be sure to map all fields that you want updated and a field must be mapped to the Interface ID.

Select *Update If ProfileNO Matches* to update existing profiles in *ClientBase* when data being imported has an Profile Number that matches an existing Profile Number in *ClientBase*. The **only time** to select the *Update if ProfileNO Matches* option is if you are importing back into *ClientBase* a .txt file that previously had been exported from *ClientBase*.

Interface ID Filter: From the drop-down menu, select *Import as is (DO NOT FILTER)* which brings over all special characters such as dashes, parentheses, etc.*;* or *Only Grab Alpha-Numeric Characters* which strips all special characters from Interface ID. by dropping dashes, brackets, etc.

Important Note: *As you are mapping the fields from the import file to the fields in ClientBase, it is important to remember that any fields that are being mapped to in ClientBase will be replaced by the value of the field in the import file, even if it is empty.*

Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file you are importing.



Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported.

(**Please note:** Bolded field names are available only in *Trams Back Office*, not *ClientBase*.)

Profile Fields
Profile No
Profile Type
Name
Interface I/D
Altinterface ID
Title
Business Type
First Name
Last Name
Middle Name
Courtesy Title
Modified By
Modified Date
Creation Date
Preferred
Notes
Add'l Notes
Other
Statement Remarks
Active
Travel Pref
Salutation
Primary Agent
Vendor ID
Referred By
Branch
Create By
Web ID
Web Password
Membership ID

Constant: By clicking *Constant* after choosing a field from *ClientBase*, pick a value from a drop-down menu (if available); or type in a value to use for the selected field. For Profile Type below, the default *ClientBase* values are shown.

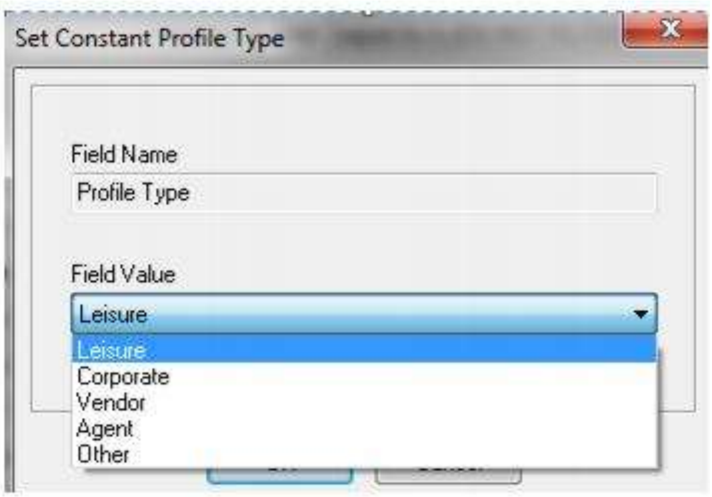
Reminder: If you have selected the *Update If InterfaceID Matches* above, be sure to map all fields that you want updated. If using a phone number as the profile Interface ID, map it at this time.

Rule: By clicking *Rule*, setup a conditional "if...then" statement/s for the file being imported.

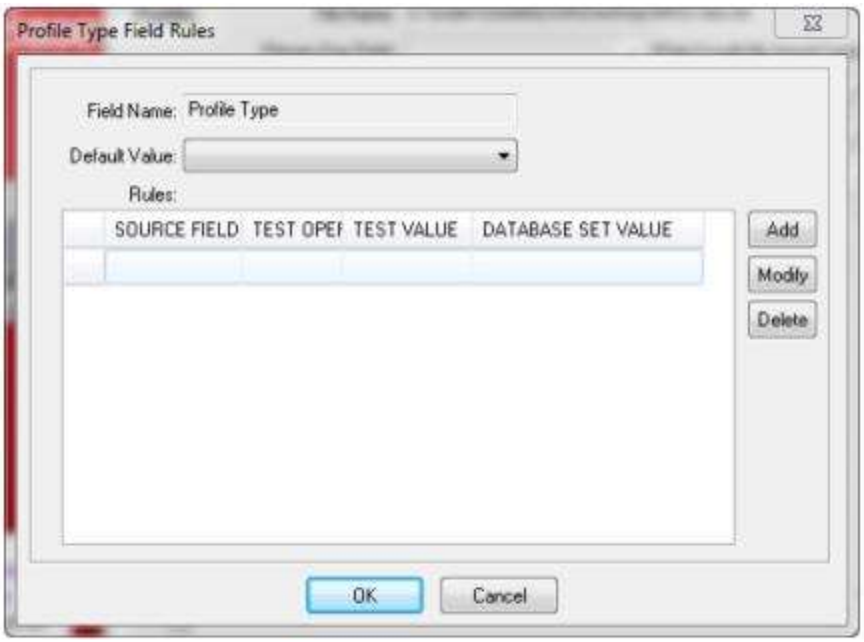
Example: You have included in your import file a header called, *Profile Type*. For each profile type marked with an "A" in your import file, you want it to come into *ClientBase* as an Agent profile. For each profile type marked with a "C", you want it to come into *ClientBase* as a Corporate profile, and so on. By setting up a *Rule* for each of these conditions, each record in the import file comes in correctly as the appropriate Profile Type.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value to use by choosing *Constant,* or *Map* a value from the import file for the selected field. This value is used if the data does not meet the condition you set up in the rule.



Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*.



To add a rule:

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field. Using our example, select Profile Type.

Source Operation: Choose the Source Operation, =, “equals,” or <>, “not equal” from the drop-down menu. Using our example, use =.

Source Test Value: Type a value from the file you are importing. In our example, we would insert an “A” (for Agent) and add a new rule for “C” (for Corporate), etc.

Then set Database Field to: From the drop-down menu, choose what value to use in this field if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

Automap: If the column header labels are exactly the same as the fields in *ClientBase* (or TBO) (this would happen if you previously exported out of *Trams* and now are importing), click *Automap* to have the import utility map all the fields for you.

Step 5: Importing Data to Communication Fields

Click *Next* to get to the next screen in the import wizard, Communication Fields. Like the previous screen, this area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. By clicking *View*, preview the file to import. Review the communication data to import into *ClientBase* for accuracy.

The only **required fields** in this area, are the *Default Country Code* and *Default Area Code*. For the United States and Canada, the country code is 1.

Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file being imported.

Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported. All these fields can be mapped in ClientBase. Fields to map include:

Communication
Phone Number 1
Phone Description 1
FAX Number 1
FAX Description1
Email Address 1
Email Description 1
Email Permit Marketing 1
Web site Address 1
Web site Description 1
Phone Number 2
Phone Description 2
FAX Number 2
FAX Description 2
Email Address 2
Email Description 2
Email Permit Marketing 2
Web site Address 2
Web site Description 2
Phone Number 3
Phone Description 3
FAX Number 3
FAX Description 3
Email Address 3
Email Description 3
Email Permit Marketing 3
Web site Address 3
Web site Description 3

Constant: By clicking *Constant* after choosing a field from *ClientBase*, pick a value from a drop-down menu (if available); or type in a value to use for the selected field.

Rule: By clicking *Rule*, setup a conditional “if...then” statement/s for the file being imported.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value to use by choosing *Constant,* or *Map* a value from the import file for the selected field. This value is used if the data does not meet the condition set up in the rule.

Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*.

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field.

Source Operation: Choose the Source Operation, = (equals), <>, (not equal), LEN= (Length equals), LEN< (Length is less than), LEN> (Length is greater than), LEN<> (Length does not equal) from the drop-down menu.

Source Test Value: Type a value from the file you are importing.

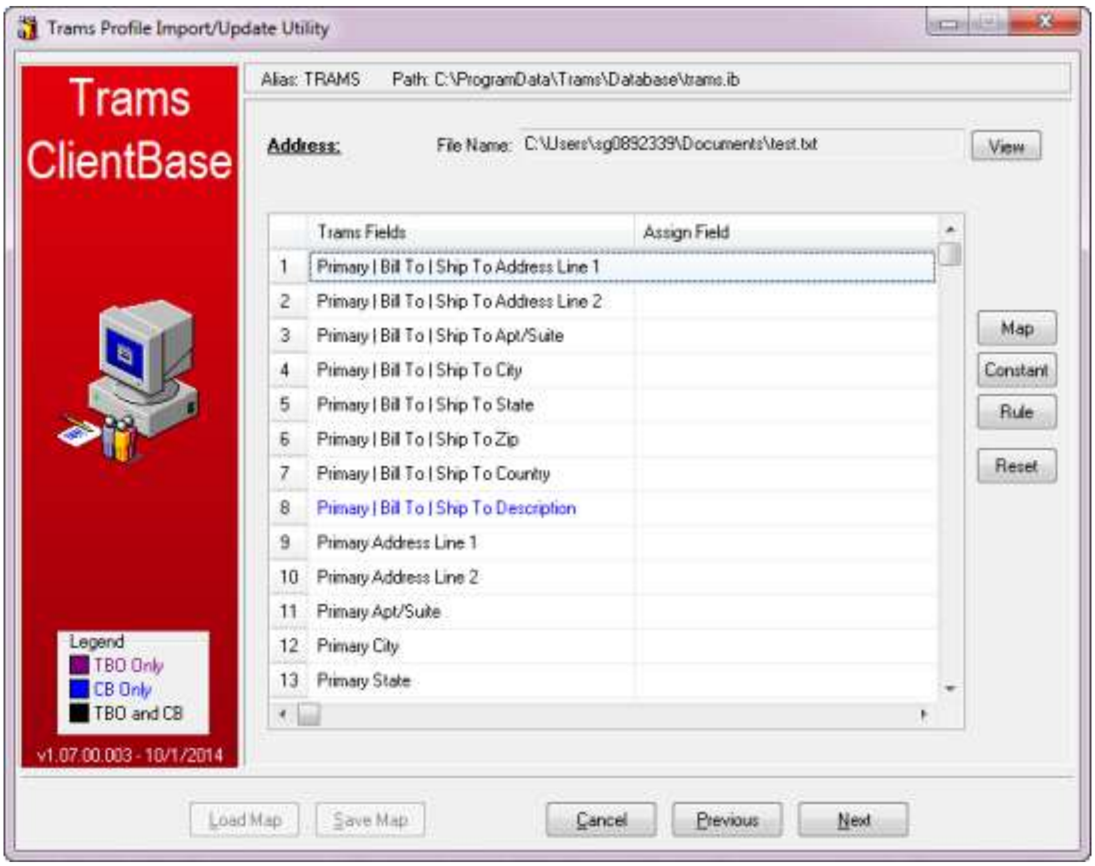
Then Set Database Field to: Type value you want to use if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

Step 6: Importing Data to Address Fields

Click *Next* to get to the next screen in the import wizard, address fields. Like the previous screens, this area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. By clicking *View* preview the file to import. Review the address data for accuracy.

Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file being imported. Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported.



Map an address to Primary, Bill To, and Ship To addresses all at once. When an address mapped to these fields is imported, one address record with the Primary, Bill To, and Ship To boxes checked is created. Fields that can be mapped are:

Constant: By clicking *Constant* after choosing a field from *ClientBase*, pick a value from a drop-down menu (if available); or type in a value to use for the selected field.

Rule: By clicking *Rule*, setup a conditional "if...then" statement/s for the file being imported.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value you want to use by choosing *Constant,* or *Map* a value from your import file for the selected field. This value is used if the data does not meet the condition set up in the rule.

Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*. To add a rule:

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field.

Source Operation: Choose the Source Operation, = (equals), <>, (not equal), LEN= (Length equals), LEN< (Length is less than), LEN> (Length is greater than), LEN<> (Length does not equal) from the drop-down menu.

Source Test Value: Type a value from the file you are importing.

Then set Database Field to: Type value you want this field to be if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

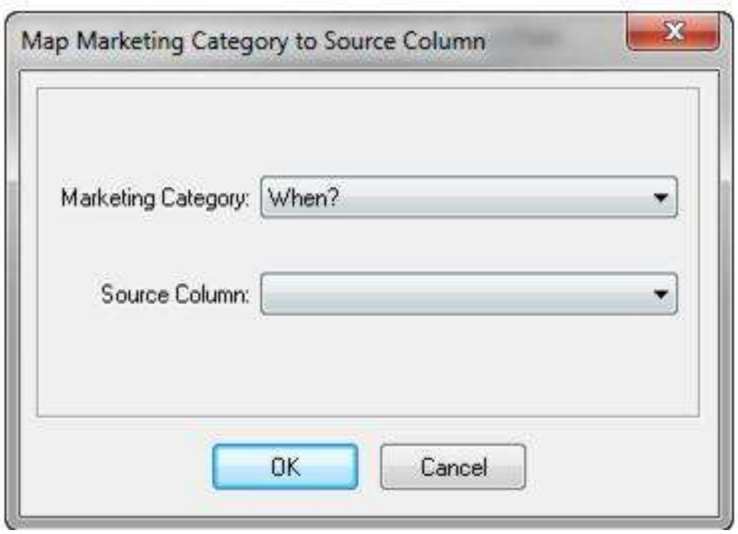
Step 7: Importing Data to Marketing Fields

Click *Next* to get to the next screen in the import wizard, Marketing Fields. Like the previous screens, this area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. By clicking *View*, preview the file to import. Review the marketing data for accuracy.

Sub-delimiter: Insert a sub-delimiter separating the marketing codes. If no sub-delimiter has been used, leave empty.

Add Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file you are importing. Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported.

Add Constant: By clicking *Constant* after choosing a field from *ClientBase*, pick a value from a drop-down menu (if available); or type in a value to use for the selected field.



Rule: By clicking *Rule*, setup a conditional “if...then” statement/s for the file being imported.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value to use by choosing *Constant,* or *Map* a value from the import file for the selected field. This value is used if the data does not meet the condition you are set up in the rule.

Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*. To add a rule:

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field.

Source Operation: Choose the Source Operation, = (equals), <>, (not equal), LEN= (Length equals), LEN< (Length is less than), LEN> (Length is greater than), LEN<> (Length does not equal) from the drop-down menu.

Source Test Value: Type a value from the file you are importing.

Then set Database Field to: Type value you want this field to be if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

Step 8: Importing Data to Traveler Fields

Click *Next* to get to the next screen in the import wizard, Traveler Fields. Like the previous screens, this area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. By clicking *View*, preview the file to import and review the traveler data.

Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file you are importing.

Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported. Fields to map include:

Traveler/Contact	Traveler/Contact
Primary Traveler/Contact Name	Second Traveler/Contact Name
Primary Traveler/Contact Dept	Second Traveler/Contact Dept
Primary Traveler/Contact Last Name	Second Traveler/Contact Last Name
Primary Traveler/Contact First Name	Second Traveler/Contact First Name
Primary Traveler/Contact Middle Name	Second Traveler/Contact Middle Name
Primary Traveler/Contact Relationship	Second Traveler/Contact Relationship
Primary Traveler/Contact Gender	Second Traveler/Contact Gender
Primary Traveler/Contact Citizenship	Second Traveler/Contact Citizenship
Primary/Traveler/Contact Commun. Type 1-**Constant cannot be mapped**	Second Traveler/Contact Commun. Type 1-**Constant cannot be mapped**
Primary/Traveler/Contact Commun. Entry 1	Second Traveler/Contact Commun. Entry 1
Primary/Traveler/Contact Commun.Desc. 1	Second Traveler/Contact Commun. Desc. 1
Primary/Traveler/Contact Commun.Type 2-**Constant cannot be mapped**	Second Traveler/Contact Commun. Type 2-**Constant cannot be mapped**
Primary/Traveler/Contact Commun. Entry 2	Second Traveler/Contact Commun. Entry 2
Primary/Traveler/Contact Commun.Desc. 2	Second Traveler/Contact Commun. Desc. 2
Primary Traveler/Contact Notes	Second Traveler/Contact Notes
Primary/Traveler/Contact Passport No. 1	Second Traveler/Contact Passport No. 1
Primary/Traveler/Contact Passport Expire Date 1	Second Traveler/Contact Passport Expire Date 1
Primary/Traveler/Contact Passport Issue Date 1	Second Traveler/Contact Passport Issue Date 1
Primary/Traveler/Contact Passport Issuing City 1	Second Traveler/Contact Passport Issuing City 1
Primary/Traveler/Contact Passport Issuing Country 1	Second Traveler/Contact Passport Issuing Country 1
Primary Traveler/Contact Passport No. 2	Second Traveler/Contact Passport No. 2
Primary/Traveler/Contact Passport Expire Date 2	Second Traveler/Contact Passport Expire Date 2
Primary/Traveler/Contact Passport Issue Date 2	Second Traveler/Contact Passport Issue Date 2
Primary/Traveler/Contact Passport Issuing City 2	Second Traveler/Contact Passport Issuing City 1
Primary/Traveler/Contact Passport Issuing Country 2	Second Traveler/Contact Passport Issuing Country 2
Primary/Traveler/Contact Courtesy Title	Second Traveler/Contact Courtesy Title
Primary Traveler/Contact Associate ID	Second Traveler/Contact Associate ID
Primary Traveler/Contact Addr Line 1	Second Traveler/Contact Addr Line 1
Primary Traveler/Contact Addr Line 2	Second Traveler/Contact Addr Line 2
Primary Traveler/Contact Addr Apt/Suite	Second Traveler/Contact Apt/Suite
Primary Traveler/Contact Addr City	Second Traveler/Contact Addr City
Primary Traveler/Contact Addr State	Second Traveler/Contact Addr State
Primary Traveler/Contact Addr Zip Code	Second Traveler/Contact Addr Zip Code
Primary Traveler/Contact Addr Country	Second Traveler/Contact Addr Country
Primary Traveler/Contact Addr Description	Second Traveler/Contact Description
Primary Traveler/Contact Addr Valid	Second Traveler/Contact Addr Valid

Constant: By clicking *Constant* after choosing a field from *ClientBase*, choose a value from a drop-down menu (if available); or type in a value to use for the selected field.

Rule: By clicking *Rule*, setup a conditional "if...then" statement/s for the file being imported.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value to use by choosing *Constant,* or *Map* a value from your import file for the selected field. This value is used if the data does not meet the condition you set up in the rule.

Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*. To add a rule:

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field.

Source Operation: Choose the Source Operation, = (equals), <>, (not equal), LEN= (Length equals), LEN< (Length is less than), LEN> (Length is greater than), LEN<> (Length does not equal) from the drop-down menu.

Source Test Value: Type a value from the file you are importing.

Then set Database Field to: Type value to fill this field to be if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

Step 9: Importing Data to Trams Back Office/ClientBase Group Fields

Click *Next* to get to the next screen in the Import Wizard, TFW/CB+ Group Fields. Like the previous screens, this area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. By clicking *View*, preview the file being imported. Review the group data for accuracy.

Group delimiter: Insert a delimiter separating the groups. If delimiter has not been used, leave empty.

On Updates, Appends to Existing Groups: Check here to append to existing groups if you are updating.

Add Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file being imported.

Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported.

Add Constant: By clicking *Constant* after choosing a field from *ClientBase*, pick a value from a drop-down menu (if available); or type in a value to use for the selected field.

Rule: By clicking *Rule*, setup a conditional “if...then” statement/s for the file being imported.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value you want to use by choosing *Constant,* or *Map* a value from your import file for the selected field. This value is used if the data does not meet the condition you are setting in your rule.

Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*. To add a rule:

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field.

Source Operation: Choose the Source Operation, = (equals), <>, (not equal), LEN= (Length equals), LEN< (Length is less than), LEN> (Length is greater than), LEN<> (Length does not equal) from the drop-down menu.

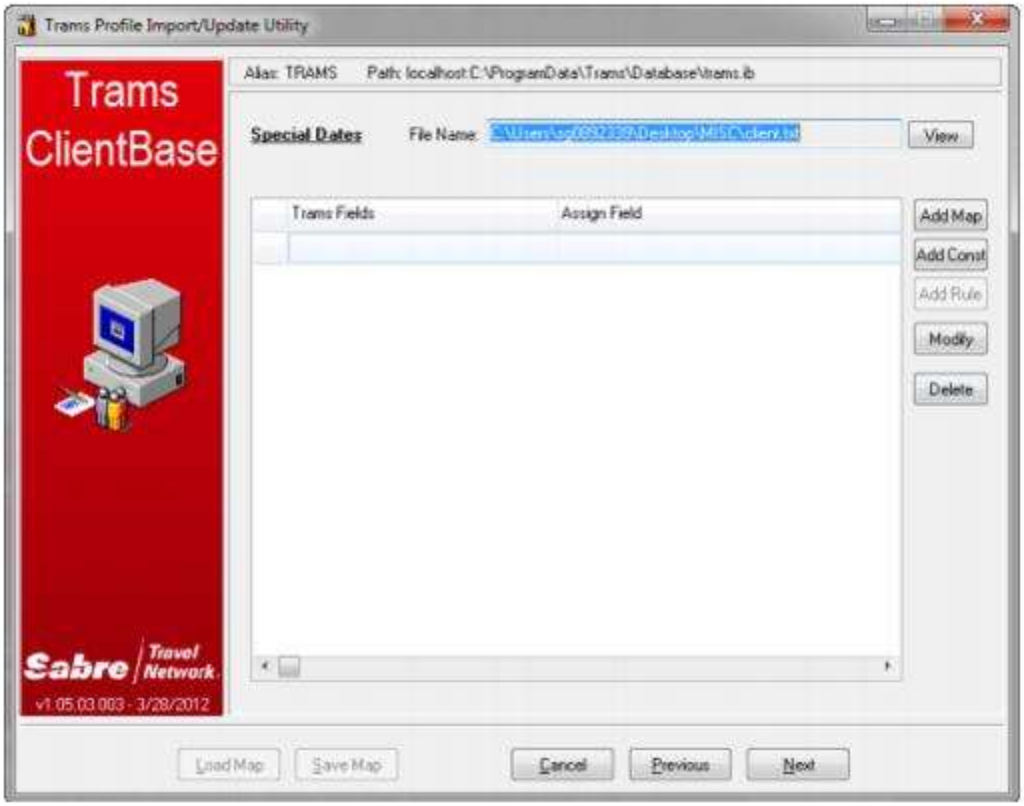
Source Test Value: Type a value from the file you are importing.

Then set Database Field to: Type value to land in this field if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

Step 10: Importing Data to Special Dates Fields

Click *Next* to get to the next screen in the Import Wizard, Special Dates Fields. Like the previous screens, this area has the capability of stamping all records in the file with an indicated value so that they all appear with that value in *ClientBase*. By clicking *View*, preview the file being imported. Review the data for accuracy.



Add Map: By clicking *Map*, link a selected *ClientBase* field:

Special Date Type: Select from the drop down list of Special Date Types created in your *ClientBase* database (e.g. Wedding Anniversary). Please note if the desired Special Date Type is not included within the drop down, you must first go to *ClientBase*, and from **Global Defaults|General Setup|User Defined Fields**, select Special Date Types and add to the default drop-down list.

Source Column: Select the column within the file you are importing that represents the special date entries.

Source Date Separator: Select between /, -, or . to identify the format used within the date fields in your source file.

Source Date Format: Select from the following to identify the format used within the date fields in your source file.

- mm/dd/yy
- mm/dd/yyyy
- dd/mm/yy
- dd/mm/yyyy
- yyyy/mm/dd
- yy/mm/dd
- yyyy/mm/dd
- dd/mmm/yy
- dd/mmm/yyyy

Based on these date settings the special date in your file is mapped to a separate Month, Day and Year field within the *ClientBase* Special Dates record.

Add Constant: By clicking *Constant* after choosing a field from *ClientBase*, pick a value from a drop-down menu (if available); or type in a value to use for the selected field.

Special Date Type: Select from the drop down list of Special Date Types created in your *ClientBase* database (e.g. Wedding Anniversary). Please note if the desired Special Date Type is not included within the drop down, you must first go to *ClientBase*, and from **Global Defaults|General Setup|User Defined Fields**, select Special Date Types and add to the default drop-down list.

Field Value: Type the value you want used for this type.

Source Date Separator: Select between /, -, or . to identify the format used within the date fields in your source file.

Source Date Format: Select from the following to identify the format used within the date fields in your source file.

- mm/dd/yy
- mm/dd/yyyy
- dd/mm/yy
- dd/mm/yyyy
- yyyy/mm/dd
- yy/mm/dd
- yyyy/mm/dd
- dd/mmm/yy
- dd/mmm/yyyy

Based on these date settings the special date in your file is mapped to a separate Month, Day and Year field within the *ClientBase* Special Dates record.

Step 11: Importing Data to Profile Remarks

Click *Next* to get to the next screen in the import wizard, *ClientBase* Profile Remarks. Miscellaneous fields in your text file can be stored in the remarks folder in *ClientBase*. By clicking *View*, preview the file to import and review.

Add Map: By clicking *Map*, link a selected *ClientBase* field with a Source Column from the text file you are importing. Field name represents the name of the field in *ClientBase*. Source Column is the name of the data (or header) of the data being imported.

Add Constant: By clicking *Constant* after choosing a field from *ClientBase*, choose a value from a drop-down menu (if available); or type in a value to use for the selected field.

Add Rule: By clicking *Rule*, setup a conditional "if...then" statement/s for the file being imported.

Field Name: This field is hard-coded and is displaying the selected *ClientBase* field on which the rule is being written.

Default Value: Choose a value from a drop-down menu if this option is available. Otherwise, type in a value to use by choosing *Constant,* or *Map* a value from the import file for the selected field. This value is used if the data does not meet the condition you set up in the rule.

Add/Modify/Delete: To add a rule, click *Add*; to modify a rule, click *Modify*; to delete a rule, click *Delete*. To add a rule:

If Source Field: The drop-down menu lists each column in the import file for selection. Choose the Source Field.

Source Operation: Choose the Source Operation, = (equals), <>, (not equal), LEN= (Length equals), LEN< (Length is less than), LEN> (Length is greater than), LEN<> (Length does not equal) from the drop-down menu.

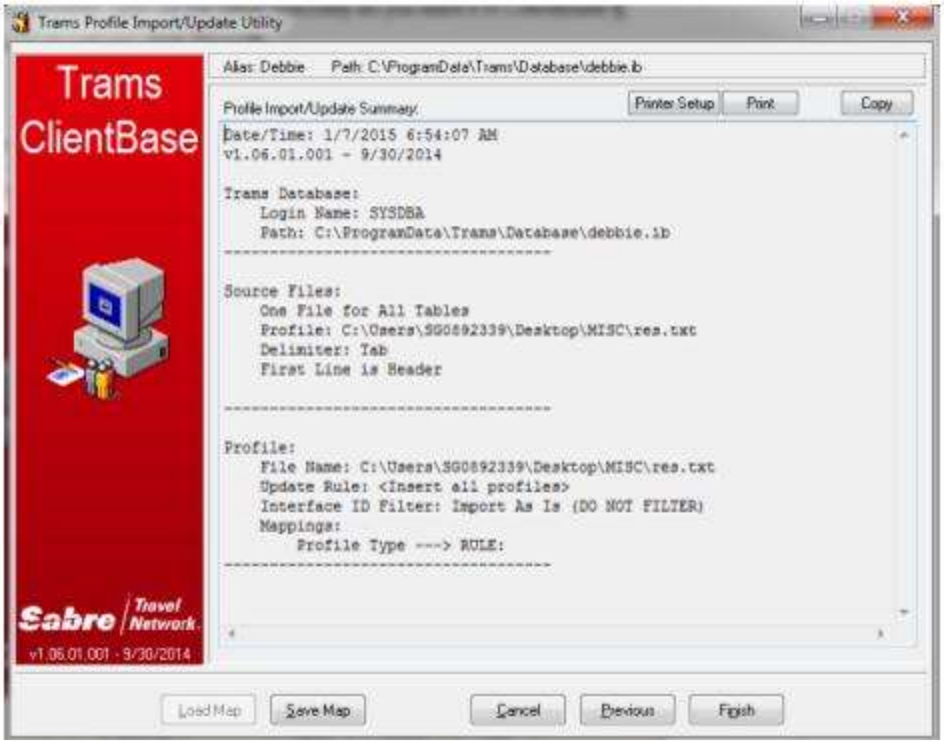
Source Test Value: Type a value from the file you are importing.

Then set Database Field to: Type value to fill this field if the source test value is met. If no drop-down menu is available, type out the value precisely as you want it in *ClientBase*.

Reset: To clear all settings, click *Reset*.

Step 12: View Profile Import/Update Summary Screen

Once the remarks table value(s) have been selected, click *Next* to get to the last screen in the import wizard. This screen provides a complete summary of all your import wizard selections.



Printer Setup: Click *Printer Setup* to select printer options for printing out the summary sheet.

Print: Click *Print* to print out the summary sheet.

Copy: Click here to copy the summary sheet to the Windows clipboard. Go to any other program to paste.

Save Map: Click *Save Map* to save the mappings. Browse to location to save the mapping. That way the next time you import a similar file, load the saved map and save lots of time.

Cancel: Click *Cancel* to abort the import process.

Previous: Click *Previous* to go back one screen.

Finish: Click *Finish* to complete the import process.

Once the import is completed view a screen of statistics stating how many profiles were inserted, updated, or skipped.

Check for Accuracy of Import

By using Level 2 Query in the Profile Manager, search for all profiles with a *Create Date*, **From** today and **To** today, or stamp some other constant in records with which to Query. Review newly imported profile data and verify that all information was imported properly.

Summary of Steps for Import Using ASCII (.txt) Files

Customer data (including names, addresses, phone numbers and marketing information) stored in ASCII (.TXT) files can be electronically "imported" into *ClientBase*. Replaces manual entry.

1) **From the data storage source file**, create an ASCII-comma or tab delimited file that can be imported using the *ClientBase* Import/Update Utility. Clean up file by deleting totally blank columns, adding Headers and, as needed, delimiters (most commonly used are a tab or a comma).

2) **Prepare *ClientBase*** with desired Marketing Codes, More Fields, Agents, etc. Create and assign a unique entry field in order to easily query for newly imported profiles. Backup your database before starting.

3) **Open *ClientBase* Import/Update Utility** (**Start|Programs|*Trams*|*Trams* Profile Import** and follow the wizard:

- Connect to your Database (select applicable Alias)
- Login (SYSDBA or a login with "Manager Authorization")
- Select an Import File from Profile Tab

- Check First Line is Header if .txt file has column labels
- Delimiter - Select Tab or Comma as applicable.

4) **Load Map -** Click this shortcut to utilize previously saved import setup.

5) **Update Rule** - Select from the following options:

- Insert All Profiles - does not check for existing matching profiles - creates a new profile for all.
- Update if INTERFACEID matches **-** updates data that is currently in your database. Since the profile already exists, you want the import routine to find this profile and change the address instead of creating a new profile, which would be a duplicate. Matches by Interface ID.
- Update if PROFILENO matches - same concept but matches by Profile Number.
- Interface ID Filter: Import As Is (Do Not Filter) - adds all special characters to the Interface ID; or Only Grab Alpha-Numeric Characters - removes all special characters from Interface ID

6) **Profile Fields** - Assign desired data to key associated fields using Map / Constant / Rule

- Map - Pulls the data from the assigned column in the file adding individualized data.
- Constant - Adds the same consistent value to every profile being created or updated.
- Rule - Using logic, allows variable data to be assigned to associated field.

Remember only data added from the utility will be populated in the profile. The more fields selected, the more complete the profile.

Suggested Key Fields **-** Based on data in file: *Profile Type - Required field - must assign; Interface ID - Required if using Update if INTERFACEID matches; First Name / Last Name / Courtesy Title; Creation Date; Salutation; Primary Agent; Referred By; Branch; Create By; More Fields (as needed).*

7) **Communication Fields** - Assign desired data to key associated fields using Map/Constant/Rule:

- Assign Phone, Fax, E-mail, Web Site
- Add Descriptions - easy identification in profile
- Permit Marketing - important for e-mail marketing
- Use Map, Constant, Rule
- Add up to three of each type of communication.

8) **Address Fields** - Map Primary Address Field; and after Import, manually assign addresses as Bill To and Ship To.

9) **Marketing Codes** - Assign Marketing Codes to the applicable Marketing Categories. **Note**: If file contains a sub-delimiter, must assign to field. If it exists in field and not accounted for, it will move codes incorrectly.

10) **Traveler Fields -** Add Primary Traveler First / Middle / Last Names and other details; and add Spouse if have.

11) **Profile Groups** - If applicable, assign Groups.

12) **Special Dates -** Add profile-related Special Dates such as Wedding Date; do NOT add Birthday to this field; check entry for correct format of dates.

13) **Profile Remarks** - Add Miscellaneous Data - will appear in Remarks area of profile

14) **View Profile Import/Update Summary Screen -** Before clicking Finish, review the data and the import fields. **Note:** If will be needing this set of import rules again in the future, save Map.

15) **Check for accuracy of Import -** Query by the unique field you created to search for newly imported profiles. Be sure data came over accurately. Run Dupe Check. Clean up fields, use Global Modify.

Chaper 5: Get To Know *ClientBase*

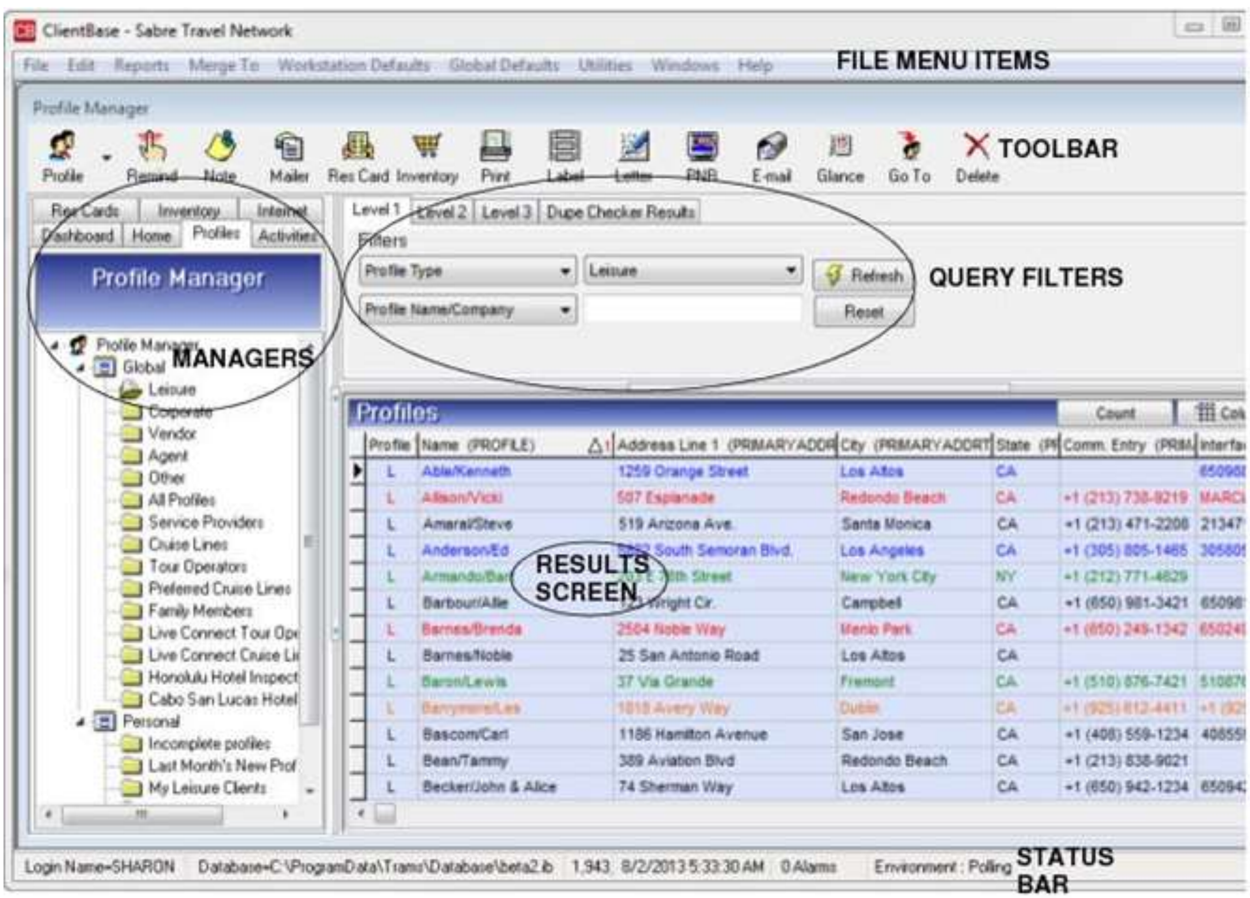
This chapter provides a general overview of ClientBase. The features of the program are broadly discussed in this chapter with an in-depth look at each feature and agency application outlined in succeeding chapters.

At the heart of ClientBase is the ability to locate, modify and use the information held within the agency database. This database contains a wealth of knowledge on past and present customers and vendors. 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 is the tool of choice to easily access, manage, update and use this valuable database information. We'll show you how!

The first screen to appear after signing in is the ClientBase main screen. To become better acquainted with the ClientBase features, it may be helpful to think of the screen as being divided into six sections:

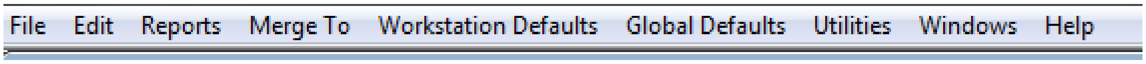
1. Menu Items
2. Toolbar
3. File Manager
4. Query Filters
5. Results Window
6. Status Bar

ClientBase Main Screen

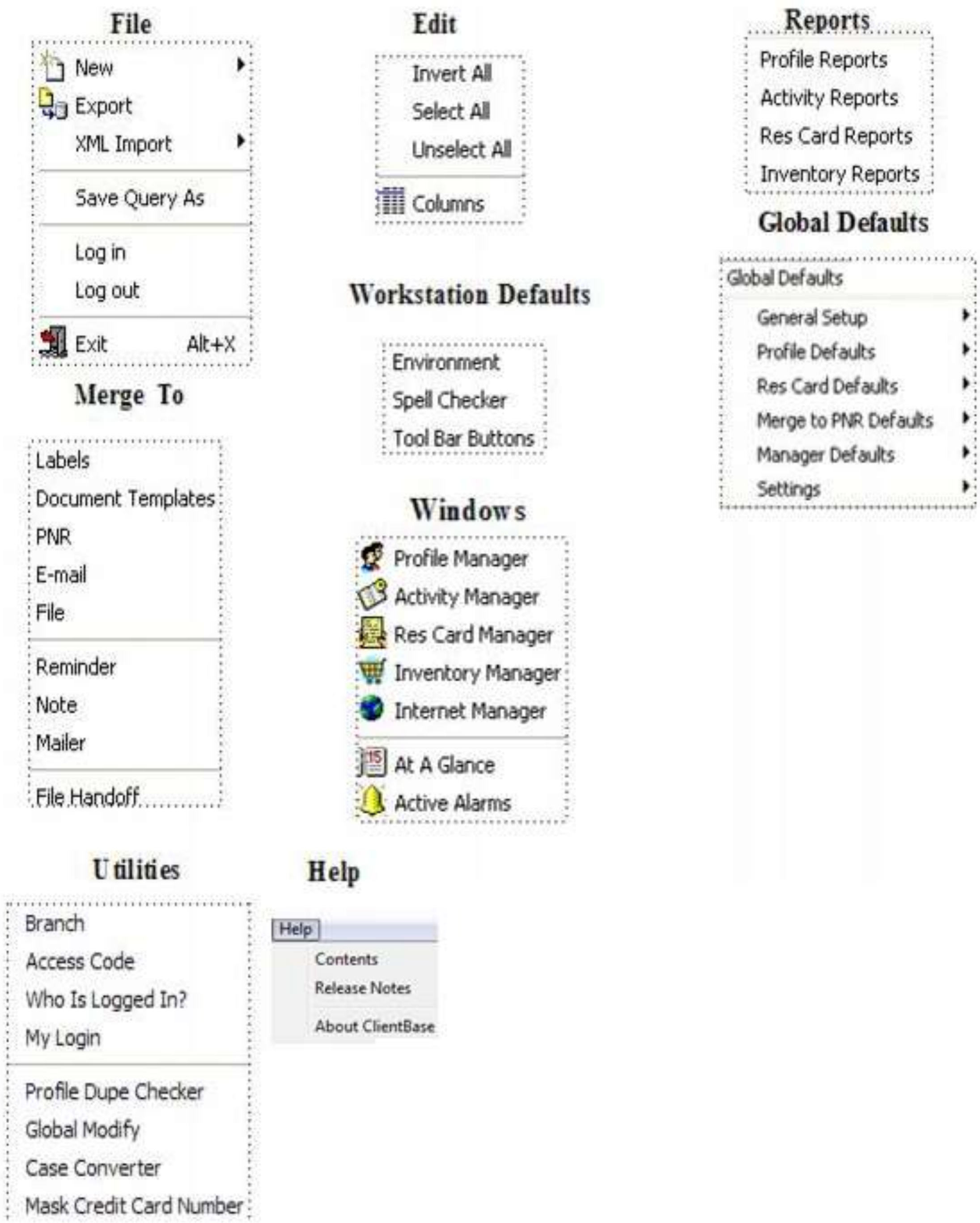


Meet the Menu Items

Located at the top of the screen are menu items (File, Edit, Reports, Merge To, Workstation Defaults, Global Defaults, Utilities, Windows, and Help). Click the tabs or use hot keys (Alt + underlined letter) to get to the menu items. An arrow to the right of a menu indicates there are additional sub-menus for selection. Anything that needs to be done in *ClientBase* can be done from the main menu.



Main Menu Items



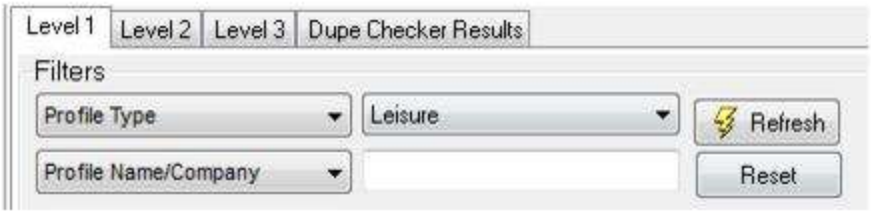
Meet the Toolbar

The toolbar provides short-cuts to frequently performed tasks such as creating a new profile, launching a document template, or moving profile data into a PNR. Placing a cursor on any of the icons on the toolbar brings up a call-out box describing its function.

Meet the Query Filters

Your database holds a wealth of information on customers - marketing activities, reservations, and vendors. This information is of little value unless it can be quickly accessed when needed. The Query feature provides filters to quickly sift through data to match your required search criteria.

Depending on which manager you are working in - Profile, Activity, Inventory, or Res Card, you have the capability to perform either a simple or complex search. The Query filters vary based on the applicable fields found within that manager. For example, choices in the Activity Manager are based on the fields found in reminders, notes and mailers. The Profile Manager includes those fields associated with any type of profile. The Res Card Manager allows searches for Res Cards using any Res Card fields as search criteria.



Query Level 1

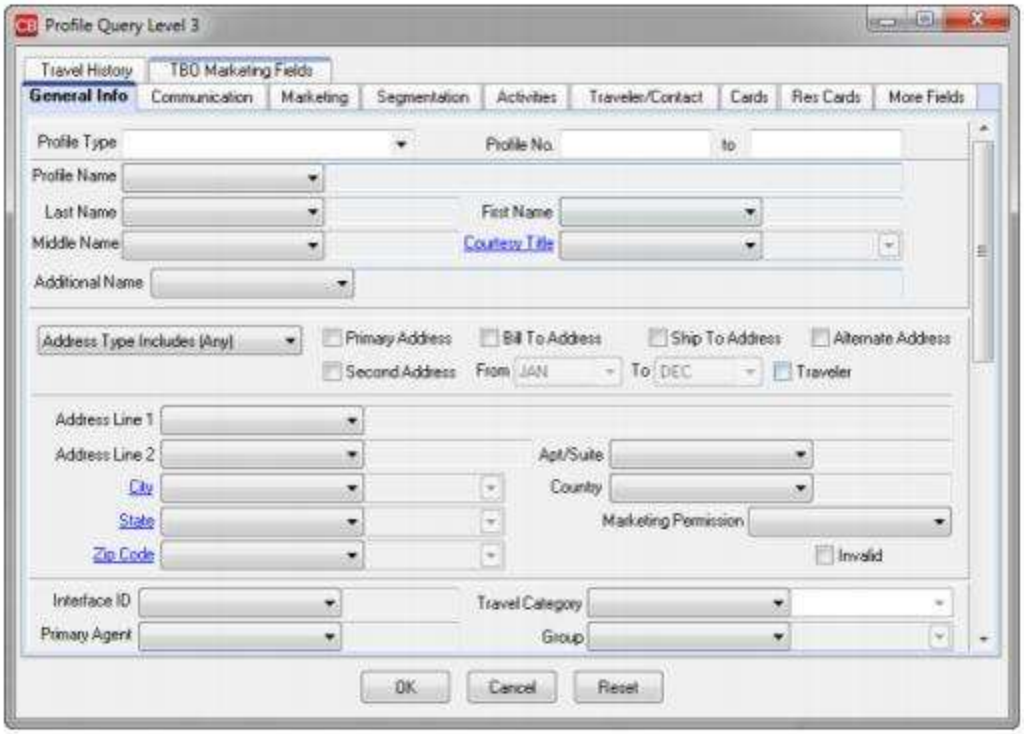
Use Query Level 1 level to quickly locate a profile or a group of profiles by simply completing one or two Query filters. The drop-down field to the left identifies what to search by, and the blank field to the right allows you to type in what you want to search for. If both fields are used in this Query, then the results match both criteria, not either/or. This means the Query filters are strung together with an “and” not an "or". (Another way of saying this is that **All** fields are evaluated to form the results of the Query, instead of **Any** filter selected within one field being evaluated to form the results of the Query.) For example, if you are looking for an leisure client named Harry Ford, then set the first field to Profile Type and select *Leisure*, then set the second field to Last Name and enter “Ford”. All Leisure Clients with the Last Name of Ford appear in the Query results.

Query Level 2

The Query Level 2 provides additional filters that more narrowly define a search. Search filters are selected by clicking *Filter,* and then completing as many of the search criteria fields as desired. Each field selected is strung together with an “and” (matches **all**) that more narrowly defines the Query. Inside the Marketing Tables, if multiple Marketing Codes are selected these are strung together with an "or" (matches **any**). For example, if you have just received a hot cruise special to Europe and want to send a mailing to all past and potential cruise clients interested in Europe and living in the 90045 zip code, you would put the following filters in your Query. First select *Leisure* under *Profile Type; 90045* in *Zip*; *Europe* and *Cruise* under *Marketing* categories, and click *OK.* Now you have selected the filters to Query your database for all leisure clients who expressed an interest in cruising and want to go to Europe and live in the 90045 zip code area. When you click *OK,* all clients in your database meeting the selection criteria are displayed on the results screen. You are now ready to print your labels and send the mailing.

Query Level 3

The Query Level 3 provides users with an even greater ability to more narrowly define a search. This Query is available in all managers. As detailed above, Level 2 Query allows a search by any number of fields, stringing one statement of criteria together with an “and.” Query Level 3 strings multiple statements of criteria together with an “or,” using *search method options* (operators) to define how the criteria should filter.



The *Filter Type* for Communication, Activities, Family/Contact, Cards, Res Cards and Travel History tabs renders the queries even more user-friendly and flexible:

Blank Filter Type: By default a new Query has this Filter Type blank, which means the Query is not be filtered in any way by that tab of information.

Does Have Records with the following criteria: If this option is selected and no other search criteria is entered in that tab, then only profiles that have that type of record are included. For example, if you set the Travel History Filter Type to "Does Have Travel History Records with the following criteria" and no further criteria is entered, then this Query returns only profiles that have any kind of Travel History. If you enter further search criteria in this tab, then each criteria is strung together with an "and" and the system looks for at least 1 record that meets **all** the criteria (in the example of Travel History, it looks for at least one invoice that meets **all** the criteria) and if at least 1 record is found, then the profile with that record is included within the results.

Does Not Have Records with the following criteria: If this option is selected and no search criteria is entered, then only profiles that do not have any of that type of record are included. For example, if you set the Travel History Filter Type to "Does Not Have Travel History Records with the following criteria" and no further criteria is entered, then this Query returns only profiles that have never purchased anything from your agency (those with no invoices). If you enter further search criteria in this tab, then think of this option as an "Exclude", which means it doesn't matter whether the profile has that type of record or not, exclude them if they do have that type of record that meets all of the additional search criteria.

Search operators *Is Equal to Any* and *Is Not Equal to Any* are also located within a Level 3 Query. When either operator is selected, rather then forcing you to select one filter from the drop down list, you are now able to select multiple filters from the drop down list by placing a check in the desired choices. When multiple filters are selected within one field, each filter is strung together with an "or". (Another way of saying this is that **Any** filter selected within one field is evaluated to form the result of the Query.)

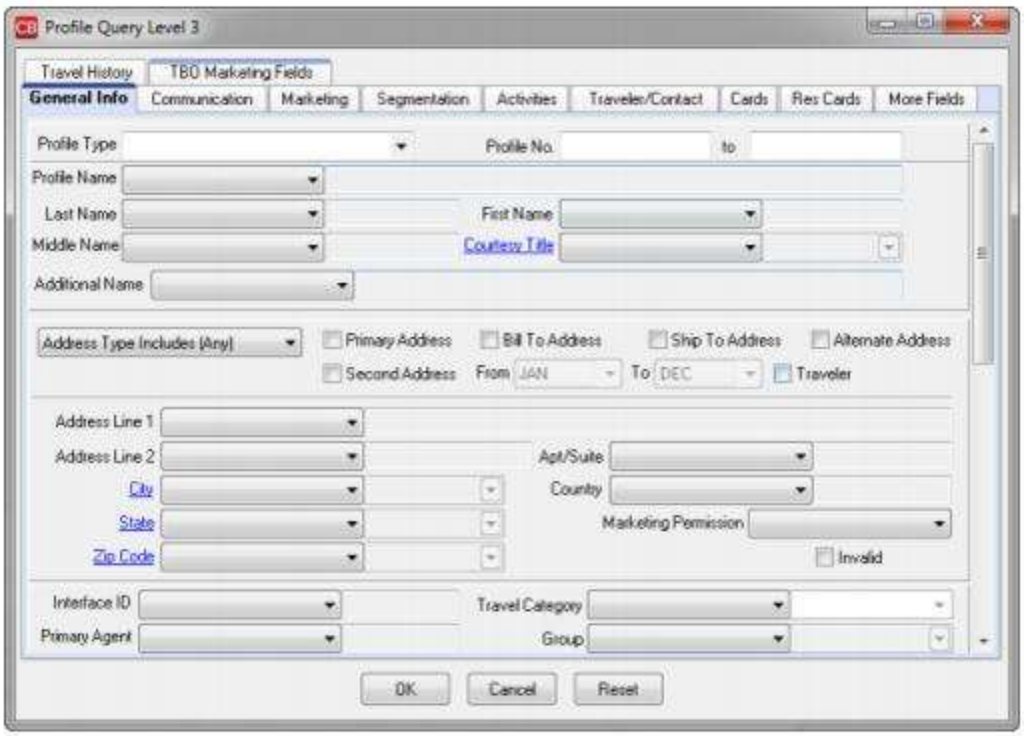
For example, if you set your Search Operator for State to *Is Equal to Any* and check CA, AZ, and WA from your drop down list, after setting the Profile Type to *Leisure*, then your Query returns all profiles that are Leisure **AND** are in either CA, AZ, **OR** WA. In addition to selecting from the drop-down list, you can also free flow your filter if the search operator is set to *Is Equal to Any* or *Is Not Equal to Any*. When free flowing filters, to include more than one filter, then type each filter in and separate each with a comma ",". For example, if you don't have states entered into your drop down list, but would like to filter on CA, AZ or WA then set your Search Operator to *Is Equal to Any* and type into the State field *CA,AZ,WA*.

Note on Sorting in Level 3 Query: Values entered into Alpha-numeric fields are always treated as STRINGS, so they do not sort in numeric order. If you want to use the fields to enter numeric values, then pre-determine the maximum digits that will be used, and start entering number with zeros in front..... for example, 00001, 00002, 00003, 00004, 00005, etc. Note that you can use less than/greater than when Querying for Alpha-numeric fields to filter for ranges of records. For example, you want to Query for values that begins with letter A thru R. Filter for Less than "S", or use Less Than or Equal to "R".

Meet the Query Results

The results screen displays the results of your Query based on the criteria entered into the Query filters. Only those records that meet the criteria of the Query filters are included in the Query results. While working in the Profile Manager, all Query results are displayed by profile (Leisure, Corporate, Vendor, Agent, Service Provider, and Other). While working in the Activity Manager, all Query results are displayed by activity (Notes, Reminders and Mailers). While working in the Res Card Manager, all Query results are displayed by Res Card.

In the example below, the Query filters have been entered from the Profile Manager and set to profile type of *Leisure* and *City* starting with*,* Manhattan. The Query Results displays all leisure clients in the database whose city is Manhattan Beach. To select a record appearing within the results screen, double-click the entry and the profile details appear.

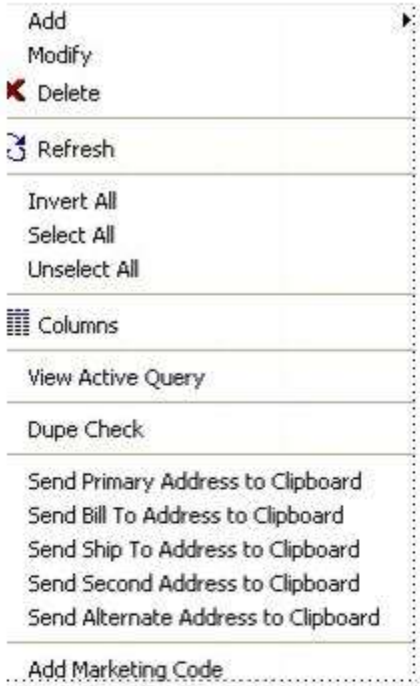


Query Results Count

Click *Count* to find out how many profiles meet the results of the Query filters currently selected. In this next example, we are working in the Activity Manager and have entered our desired Query filters. The Query results displays all activities in the database that are open reminders for agent Sharon. To select a record appearing within the results screen, double-click the entry and the activity details appear. To view the profile an activity was created for, click once on the activity to highlight it, then click *Go To Profile* on the toolbar. *ClientBase* allows easy navigation between the activities in the results screen and the profiles for which the activities were created.

Right Mouse-Click in the Results Screen

Perform certain functions by right-mouse clicking in the results screen:



Add - Add a new profile

Modify - Modify the selected profile in the results screen.

Delete - Delete the profile/s selected in the results screen (to select multiple profiles, hold down the Ctrl key and pick).

Refresh - Refresh the Query (search) if you have just made a change.

Invert All - Before doing any Merge to Features, such as Merge to Letter, Merge to E-mail or Merge to Document Templates, for example, hold down the Ctrl key for those you do not want to include and *Invert All.* It will launch the feature for everyone BUT the ones you selected.

Select All - Selects everything in the results screen.

Unselect All - Unselects everything in the results screen.

Columns - Allows you to customize the columns and sorts in the results screen.

View Active Query - Summarizes the Query in the results screen.

Dupe Check - Ever spot duplicate profiles while working the the profile manager queries and want to merge them right then and there? A field called *check for duplicate profiles in* allows you to setup using the Entire Database, Current Results in Level 1, Level 2 or Level 3 Query. If set to Using the Current Results, rather than the Entire Database, by default the Disable Dupe Check Filters are checked, and by clicking OK, you obtain the current Query results displayed in the Dupe Checker window, so that you can use the Merge to Master feature.

Send Primary/Bill To/Ship To/Alternate Address to Clipboard - This sends an full name and address to the clip board for the selected profile, so you can paste into another application.

Add Marketing Code - You have the ability to add one marketing code at a time but to multiple profile results directly from the Profile Manager Query results. The next time you have a deluxe cruise promotion, for example, ask your agents to Query their client profiles and from the results hold down the Ctrl key while clicking on each client record that you would like to identify as a deluxe cruiser. After all desired profiles from the list have been selected (highlighted), use your mouse and right-click and select Add Marketing Code from the options. First add the marketing code for Deluxe (you will be prompted with a message Add Deluxe to Selected Results in Profile Manager). Then right-click again and add the marketing code for Cruisers.

Meet the File Manager

Located to the left of the screen is the *ClientBase* File Manager. To assist you with managing a rather elaborate database of information, the File Manager is divided into 6 Tabs:

(1) ***Profile Manager*** allows easy management of profile data (Leisure, Corporate, Vendor, Agent, Service Provider, and Other) and provides Query filters and results listed by profile.

(2) ***Activity Manager*** allows easy management of activity data (Notes, Reminders and Mailers) and provides Query filters and results listed by activity.

(3) ***Res Card Manager*** allows easy management of Res Card data and provides Query filters and results listed by Res Cards.

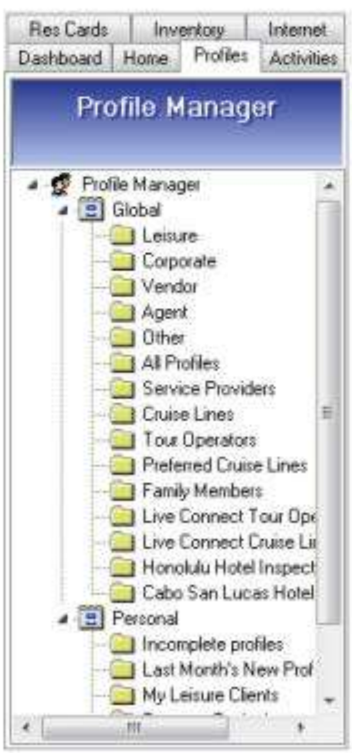
Although the system comes with a default set of folders within each File Manager, these folders are completely user-definable. Simply enter the desired Query filters, arrange columns as desired, then click *File* and *Save Query As* to save as a folder within the File Manager. Folders can be saved on a global level, meaning this folder is available to all users; or they can be saved on a personal level, which means this folder is only available for a unique user login. To select a folder from the File Manager, simply click the folder and the system automatically completes the Query filters, sifts through the data, and displays the outcome in the Query results window. To rename or delete a folder, right-click the folder name.

(4) ***Internet Manager*** allows you to seamlessly link to the Internet without leaving *ClientBase* or launching another browser application. Easily manage Global and Personal Internet sites, by clicking saved folders to automatically launch your default browser and take you to the selected website.

The Internet Manager comes with some default folders for your convenience. Among these are *Passport Online, Trams Training Options,* and *AIPlus E-Postcards. Passport Online and AI E-Postcards* provide specials and postcards with raw HTML formatting that can be used with SMTP e-mail (please refer to chapter entitled, *E-mail Marketing in ClientBase.)*

(5) ***Inventory Manager*** allows easy management of inventory data and provides Query filters and results listed by inventory items. The Inventory Manager comes with some global default folders for your convenience including Air, Cruise, Hotel, Rail, Tour, and Misc.

The file folders listed within each tab of the File Manager represent a set of Query filters and column arrangements that have been saved and named as a folder. With a single click of the mouse, these folders automatically complete Query filters to display Query results.



Although the system comes with a default set of folders within each File Manager, these folders are completely user-definable. Simply enter the desired Query filters, arrange columns as desired, then click *File* and *Save Query As* to save as a folder within the File Manager. Folders can be saved on a global level, meaning this folder is available to all users; or they can be saved on a personal level, which means this folder is only available for a unique user login. To select a folder from the File Manager, simply click the folder and the system automatically completes the Query filters, sifts through the data, and displays the outcome in the Query results window. To rename or delete a folder, right-click the folder name.

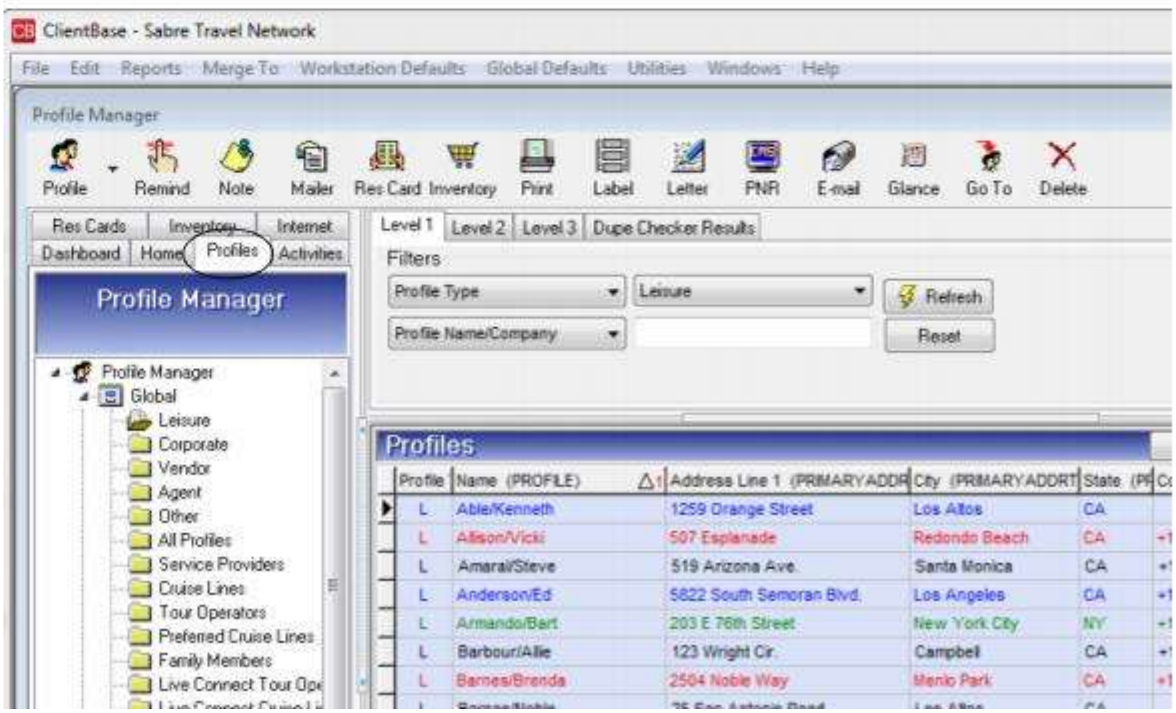
(6) ***DashBoard*** - Just like a car dashboard that provides a panel of quick visual cues of critical information at a glance, the agency Dashboard feature provides significant data at a glance for owners/managers and agents to use to monitor different facets of the business such as sales and marketing.

Meet the Managers

Each of the managers represents a different view of the entire database (*ClientBase* is really broken into 4 mini-databases - with the exception of the Internet Manager and Dashboard areas- that organize and maintain a portion of the data held within the program database). The information in these mini-databases can be managed, updated and filtered with the Query outcome displayed on the results screen. Whether you want to search your database of profiles, activities, inventory, or Res Cards (or use the Internet Manager to launch your default browser to take you to a selected website) determines which of the managers to select.

Profile Manager

Profile Manager Tab or go to **Windows|Profile Manager**



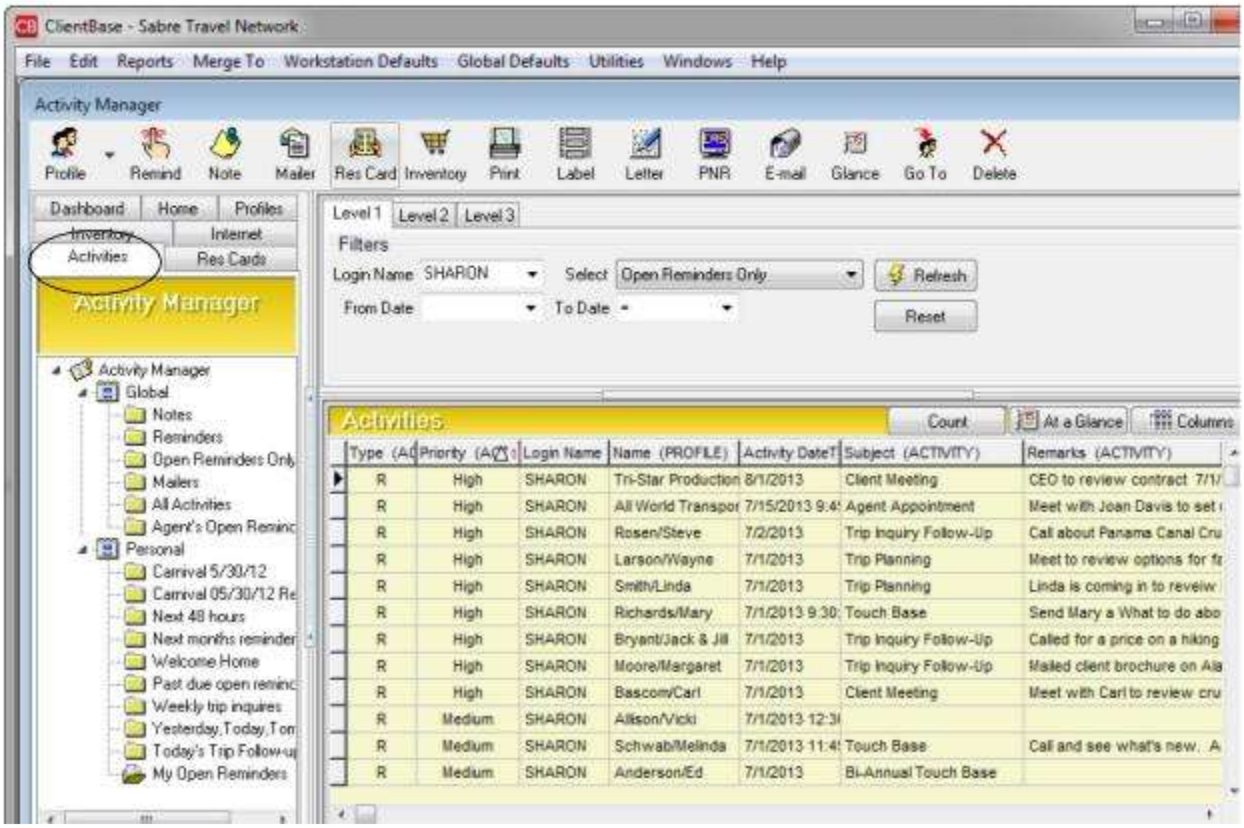
Clicking the Profile Manager tab provides fields for Query and management of the database of profiles. Stored folders and Query fields for the Profile Manager appear, as well as Query results displayed by profile. The Profile Manager provides agents with quick access to vital information about clients, vendors, inventory, agents and other profiles. From this area, *locate, add, modify* or *delete* profile records. Use the results of a Query or a selected profile to merge profile data into a label, document template, PNR, or e-mail. Also print reports based on the results of a profile Query to gain valuable insight into the data contained within profiles.

When opening the Profile Manager no Query filters are entered by default, so the entire database of all profile types appears in the Query results screen. (Unless a particular folder has been setup in user logins to open in the result screen when the program is entered.) To filter the database results, either click a folder which contains a stored set of Query fields or use Level 1, 2, 3 Query fields to enter a custom Query.

The results screen provides easy access to profile information such as address and phone numbers, to customer preferences, traveler details, activities, travel history, payment information, Res Cards and free-flow remarks. To retrieve a specific profile, highlight the entry and double click.

A new profile can be created at any time by clicking **File|New**, by clicking on the first toolbar icon, or by right mouse clicking in the results screen. More than one profile can be open simultaneously allowing for multitasking flexibility. Use the *Windows* menu item to display a listing of each open profile (or other open function) and easily move among them.

Activity Manager

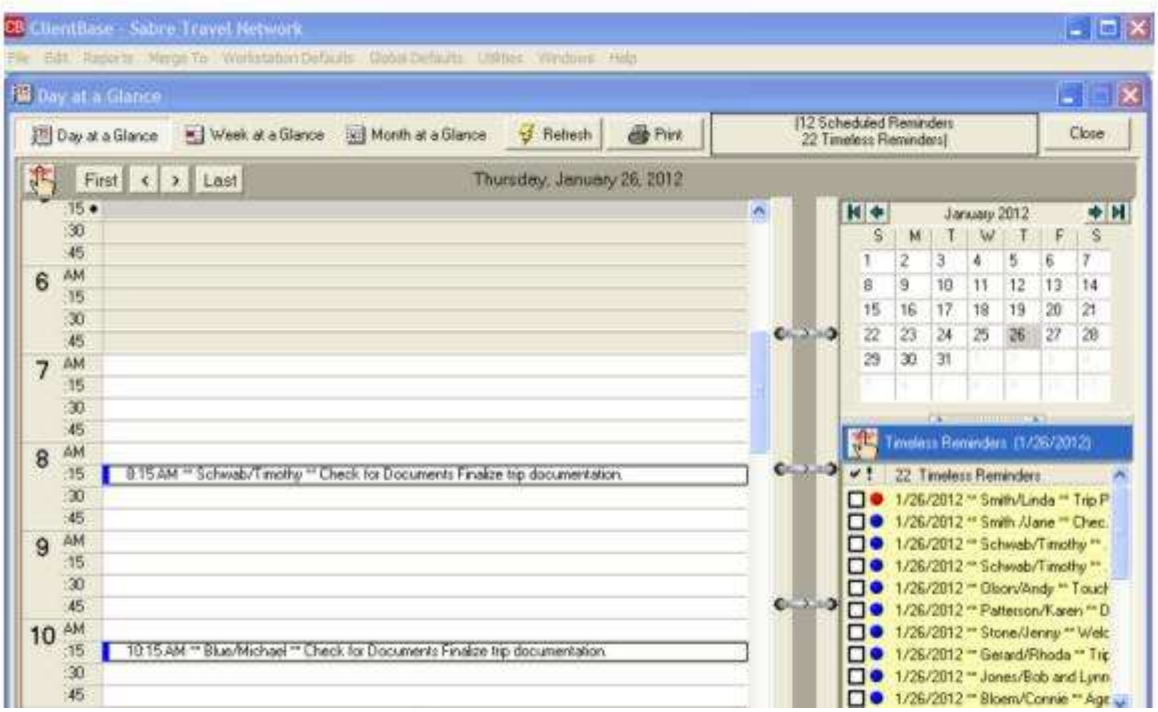


Accessing the Activity Manager allows Query and management of the database of marketing activities, thus, providing quick and easy access to all reminders, notes and mailers. This powerful tool provides a means to become more organized and gives the ability to monitor a multitude of tasks and marketing activities.

Stored folders and Query fields for the Activity Manager appear, as well as Query results, displayed by activity. From this area, view a To-Do list and *locate, add, modify* or *delete* notes, reminders and mailers. Use the results of a Query or a selected activity to merge profile data into a label, document template, PNR, or e-mail. Also print reports based on the results of the activity Query to gain valuable insight into the data contained with the database of marketing activities.

When the Activities Manager is opened, the system automatically defaults to open reminders based on the current user login, thus providing an instant detailed *To-Do* list. To change the type of activities displayed in the results screen, click a folder containing a stored set of Query fields or select Query Level 1, 2, or 3 to enter a custom Query. Next, click *Run* to display the Query outcome on the results screen.

To retrieve a specific activity, simply double-click the desired result. To easily move into the profile record for an activity appearing in the results screen, click *Go To* on the toolbar. This allows you not only to Query the database of activities, but also move easily between the results and the profile details for which they were created. From within the Activity Manager, in addition to the Query results screen, the following views of reminders make managing a schedule and automating a day planner a snap. Click *At A Glance* icon on toolbar.



Day At A Glance: Upon clicking *Day At A Glance*, today's schedule for the current login user is displayed on the screen, based on the current system date. Your Day Planner displays a schedule by 15 minute intervals, and includes any *open* scheduled reminders in the appropriate time slot. To the right, a To-Do List appears which includes *open* reminders that have been noted as "timeless," or can be done at any time on that date. Use the calendar in the top right corner to view your planner for any other day of the month or use the arrows to move between months and even years.

Week At A Glance: Upon clicking *Week At A Glance*, this week's schedule is displayed on the screen, based on the current system date and current login user. The current day is highlighted. To view another week, use the arrows located at the top of the calendar to move to previous or future weeks.

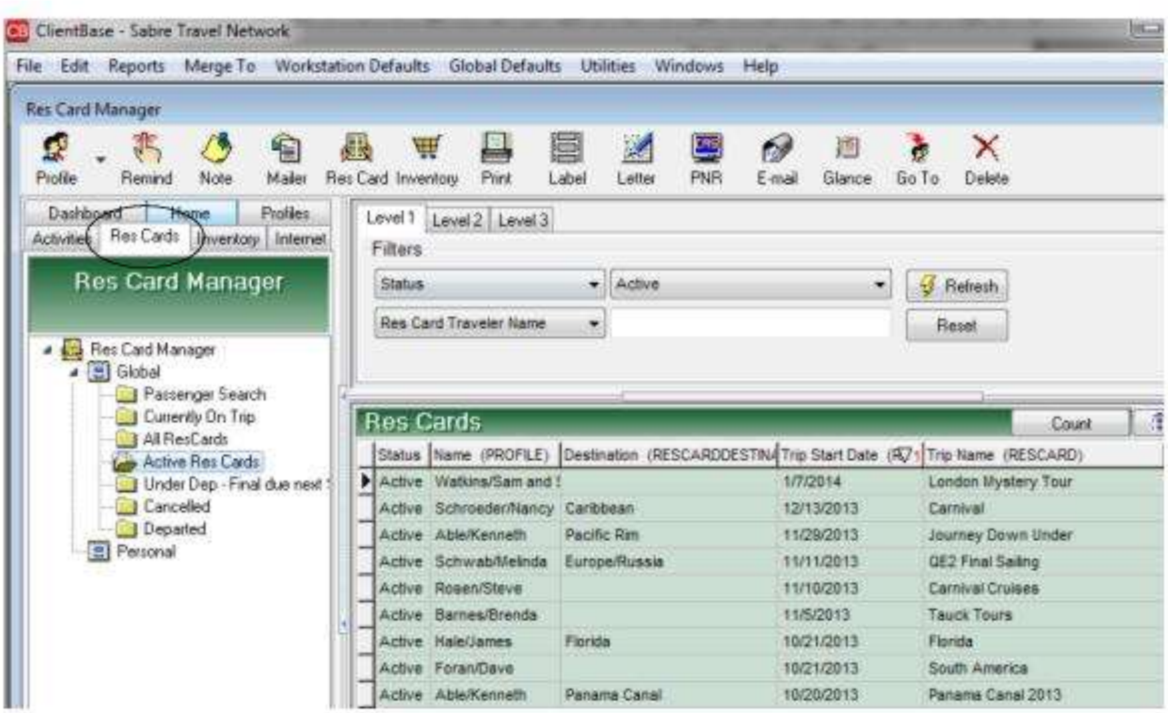
Month At A Glance: Upon clicking *Month At A Glance*, this month's schedule is displayed on the screen, based on the current system date and current login user. To view a previous or future month, use the arrows at the top of the calendar to move forward or backward. Double-click any day in the month to see that *Day At A Glance.*

Print At A Glance: Print out your calendar by clicking the print icon.

Res Card Manager

The Res Card Manager provides an automated way to Query and manage the database of reservation data, thus, providing access to all Res Card records stored in *ClientBase*. It is a powerful reservation manager designed, not to replace the GDS, but rather to provide a tool for tracking reservations that are not booked through the GDS; for example, those that are booked on-line or over the telephone.

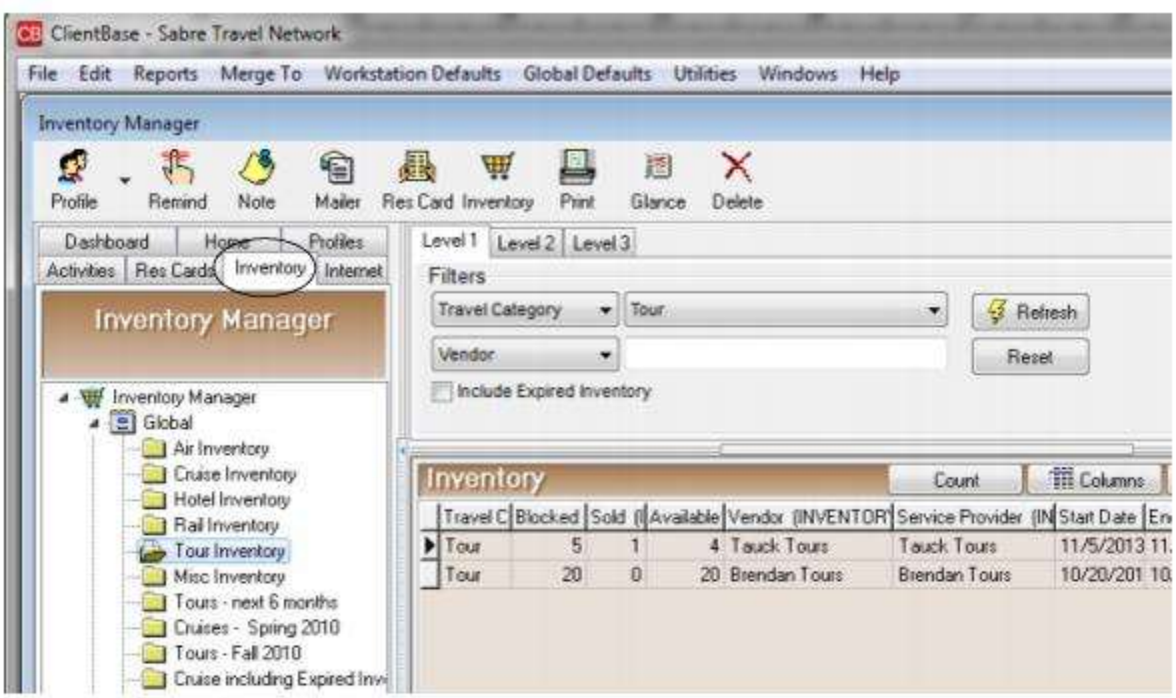
The Res Card Manager replaces the paper index Res Card and file folders that have for years cluttered agencies. In the past, agents entered details of many leisure type reservations (client information, confirmation numbers, itineraries, vendor information, remarks etc.) on cards or just loose paper. 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 the Res Card Manager, you have the tool to organize and maintain reservation information in a central database. When a customer calls, any agent can now answer questions or update information by accessing the Res Card with the customer's travel details.



Upon entering the Res Card Manager, the stored folders and Query fields for the Res Card Manager appear, along with the Query results displayed by Res Card record. From this area easily generate invoices, update reservation details, track payments received or pending, as well as all of the other details involved in planning a trip. Use the results of a Query or a selected Res Card to merge the profile data into a label, document template, PNR, or e-mail. Also print reports based on the results of a Res Card Query and gain valuable insight into the data contained within your database of automated Res Cards.

Inventory Manager

The Inventory Manager provides an automated way to Query using Level 1, 2, and 3 queries and manage the database of inventory data.



Upon entering the Inventory Manager, the stored folders and Query fields for the Inventory Manager appear, along with the Query results displayed by inventory record. From this area easily add, modify or delete inventory items. Also print reports based on the results of your inventory Query (presently the *Current Query Results)*.

Internet Manager

The Internet Manager allows you to seamlessly link to the Internet without leaving *ClientBase* or launching another browser application. In order for this feature to work, you must have Internet Explorer, version 5.0 or above installed on your set.

Go to the Internet Manager and input the URL in the *Address* field and click *Go*. To save this site within global or personal folders, click **File|Save Web Site As** and enter a free-flow name for the site and the address of the website, if not indicated.

Websites set up as global appear for all user logins, while those setup as personal appear for just your user login. Click the folder created by the *Save Web Site As* to automatically launch the default browser and take you to the selected website.

INTERNET MANAGER TOOLBAR

Back/Forward: Use these buttons to navigate through a site.

Stop: Stops any processing taking place.

Refresh: Refreshes a page with current information.

Home: Takes you to your browser's default home page.

Print: Print the results of the internet manager by using the print icon on the toolbar.

Address: Input the website address of the site you want to visit and press Go to implement.

Home

For agencies configured with a specific private labeled version of *ClientBase*, this Home tab is where to go to access the booking site. For agencies without a specific private label, we added a new tab within the *ClientBase* main Managers called *Home* which takes you to the CBMS marketing web site by default. For agencies that participate in the CBMS marketing program, you can enter your CBMS Login and Password into your *ClientBase* User Login by going to **Utilities|My Login|Manager Defaults**. (SYSDBA login can enter for all users as well.) Once captured, the *ClientBase* login will auto log you into CBMS (*ClientBase* Marketing Services) and access to your marketing calendar and other CBMS information becomes instantly available and right within *ClientBase*.

Want this to be the first manager you see when you come into the program? Go to **Utilities|My Login** and click the Manager Defaults tab. Select either Home, Profiles, Activities, Res Cards or Internet as the Login Default Manager.

Dashboard

Use the Dashboard to analyze sales data such as *Sales by Travel Category*, *New Res Cards, Active Res Cards and Res Card Cycles*. Also analyze marketing data such as *New Client Profiles Created, Profiles Updated* (with e-mail addresses, marketing codes, etc.), *Profiles with Mailers* for marketing pieces sent out or find out what the *Top 10 Marketing Codes* are.

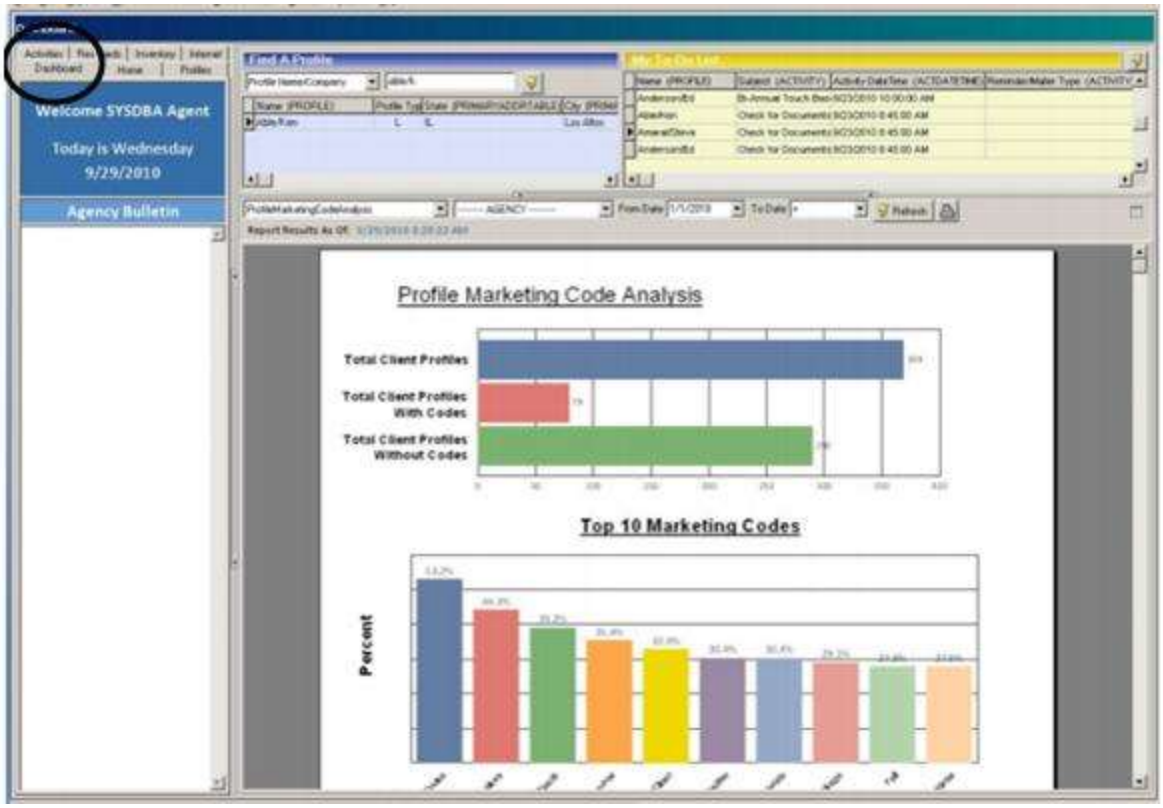
The Dashboard Manager contains four sections:

Agency Bulletin - This section displays announcements and other important information that the agency owner/manager needs broadcasted to all agents. When a new message is entered, the Agency Bulletin header will flash to alert each agent that new information was posted. To setup the Dashboard Manager select **Global Defaults|Manager Defaults|Dashboard Settings**. Under the Agency Bulletin, enter any announcements and important information that all agents should be updated about. Text can be formatted using different fonts, colors, etc. URL's can also be entered so agents can click and go directly to the website(s) provided.

Find A Profile - Quickly Query a profile and/or type of profile.

My To Do List - Agent's *To Do* list is displayed for easy viewing

Report Results - Pre-designed Crystal Dashboard reports are available in this section. Users with an Authorization of Manager may view report results for the entire agency or for an individual agent. Users who do not have a manager authorization may only view reports for their own agent profile. To run and view the results of Dashboard reports via a portal to Crystal, Crystal Report Reader version 10 is now installed on the user's workstation (if you have not yet set this up e-mail **Trams.CBSupport@sabre.com** for directions). The reports are saved in **<All User\Application Data>*Trams**ClientBase*\DashReports**.



The Dashboard Manager now allows reporting by branch. Branch numbers appear in a drop down with checkboxes so you can choose one branch or multiple branches when running a Dashboard report. The Dashboard branch filter defaults to the last branch or set of branches selected. When reports are run by agent, the agent sees information for branches based on their user permission Branch Rights. If user branch access is not limited, agent will see all activity for their user for whatever branches they have activity created.

Meet the Status Bar

Status Bar: A glance at the status bar indicates:

Log In Name=: This field indicates the current user. In this example, the system database administrator is signed in as the user.

Database=: View the drive, directory and the name of the.ib (gdb in older versions).

246,436KB: Total of free memory.

10/29/2001 10:44:02AM: Gives the current date and time.

0 Alarms: There are no alarms that have been activated and not addressed by the current user. When a yellow bell appears with a number of active alarms, this is a signal to the user that an alarm for an open reminder has gone off and needs to be addressed. Double-click yellow bell to access the reminder list.

When there is work to be done in *ClientBase,* the main screen is the place to go. From here retrieve profiles, create new profiles, manage marketing activities, move information into a PNR, generate custom letters, run reports and a whole lot more.

Chapter 6: An In-Depth Look at Client Profiles

This chapter outlines setting up, maintaining and using Client Profiles.

Introduction

In today's marketplace travel agencies are finding a need to shift focus away from just being order takers and processing transactions. In order to survive and profit, it has become imperative for an agency to service its clients and strengthen its relationships to build and retain client loyalty. The information within the leisure and corporate profiles provides an important tool to achieve this goal.

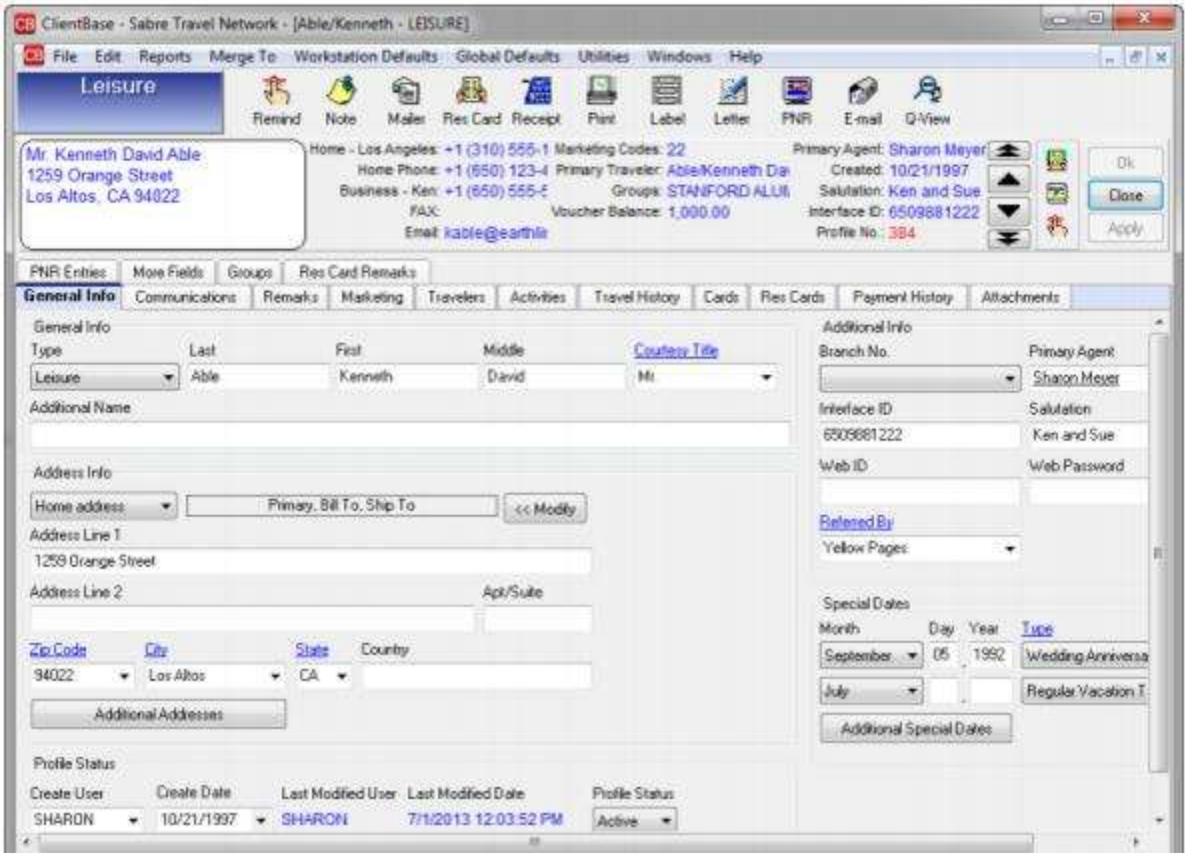
Using information in client profiles, agents can launch letters from document templates, print labels, merge to e-mail, manage booking and invoice information on reservation cards, post notes, create reminders and mailers, add attachments, move client information into a PNR and more!

Types of Client Profiles

Within *ClientBase* there are two types of client profiles - Leisure and Corporate. A leisure profile represents a leisure client's household. For example, a profile would be created for Mr. and Mrs. John Smith and each member of the household would be listed individually under the *Travelers* tab. John would be the "Primary", Karen designated as "Wife", James as "Son" and Jesse as "Daughter". Travelers can be linked to multiple profiles.

Corporate profiles are created for each of your corporate clients. Each profile can contain any number of contacts who are company travelers. These are listed in the client profile in the *Travelers* tab. As a traveler in ClientBase can be linked to multiple profiles, a contact may also be linked to a leisure profile as well.

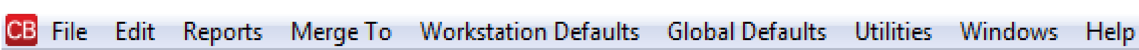
Anatomy of a Profile



A client profile stores an unlimited amount of information about your customers. To organize all this information and make it easily accessible to all agents, each profile is made up of seven key areas: *File Menu Items, Toolbar, Header Info, Scrolling Arrows, Profile Indicators, Control Buttons, Information Tabs, and User-Defined Fields.*

Let's explore each of these seven key areas.

File Menu Items



When in a profile, access file menu items to hop into another program feature. When you want to return to the open profile, click *Windows* and on the profile from the bottom of the list.

Toolbar

Create a Reminder: Click the *Remind* icon to create an activity such as following up on a brochure sent to a client. Fill in the date to be reminded, set the priority, reminder type, set an optional alarm and finally type in some free-flowing remarks for reference. Put a time on the reminder so that it appears on your daily calendar, At A Glance in the scheduled time slot, or tag the reminder as a To-Do (timeless) so it appears on a To-Do list on your daily calendar. There is also an option to mark this reminder *Private* so that only the creation agent or SYSDBA can view it. This reminder appears within the profile's activities tab, on your At A Glance and as part of your queries in the Activity Manager or reports.

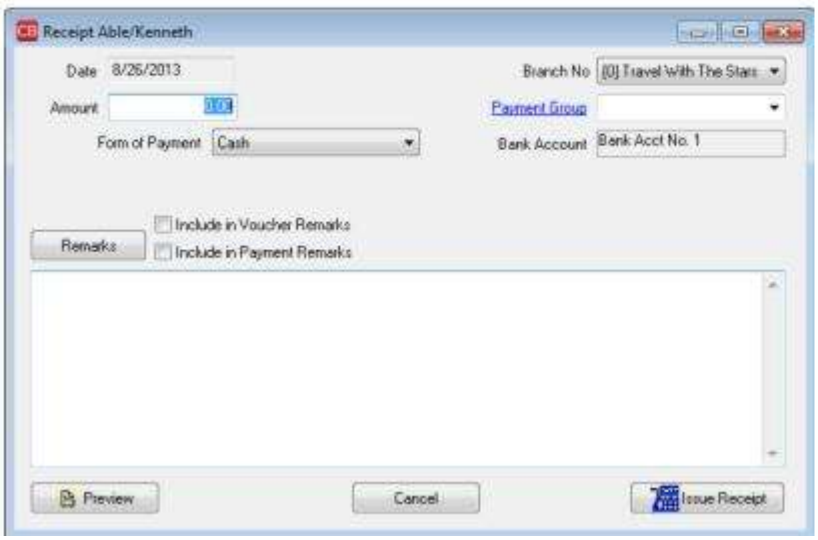
Create a Note: Click the *Note* icon to create a note documenting any contact you've had with a client such as a client question or concern. By entering the date, time, and subject of the contact, a history of contacts is created and stored within the profile's Activity Tab. This history appears in the Activity Manager and on reports.

Create a Mailer: Click the *Mailer* icon to create a mailer (history) of something you've sent to a customer; for example, a birthday card or a ski trip promotion. By entering the date, time, and subject of the mailer, the history appears within the profile's Activity Tab in the Activity Manager or on reports.

Create a Res Card: Click the *Res Card* icon to create a reservation card for trips. Track a trip from its inception to its completion. All vendor/service provider information is included, as well as, all other trip details. No more manually kept Res Cards! By entering details of the trip in progress (or by using Live Connect to pull data in from booking on-line), client balances and details of the trip can be accessed.

Create a Receipt: In cases where you are not yet ready to issue an invoice, but have received money from a client, possibly for a gift certificate or payment between deposit and final payment or payment before confirming something, a receipt can be issued in the Client Profile giving the agent a new tool for printing a document for the customer and receipting the payment as a voucher on the client's account in *Trams Back Office*.

Please note that any receipts issued from the *ClientBase* profile are not currently linked to a Res Card. But because a Receipt creates a voucher, users of Trams Back Office, can apply these vouchers to invoices that are issued later by a Res Card



Complete the following fields:

Date: Defaults to the current System date and cannot be modified.

Amount: Enter the amount of the payment.

Branch: Defaults to the current branch or choose branch from drop-down menu.

Form of Payment: Enter Check, Credit Card, or CC Merchant from the drop-down menu.

Attention Canadian Agencies: Debit card was added to the drop down list of Form of Payment selections when creating a receipt. When card number is entered the system will perform a validation, however, it is not mandatory to enter a card number for debit card form of payment.

Payment Group: Enter the Payment Group from the drop-down menu.

Bank Account: Receipts use the correct default Bank Account from TBO. This may be located at the Branch or Global level and may vary based on Form of Payment. If that bank account uses a foreign currency, the conversion rate and equivalent amount will also be taken into account when generating the receipt. The converted amount and currency will display on the Generate Receipt screen as well as on the receipt preview, printed receipt, and re-printed receipt.

Remarks: Free-flow remarks or click the *Remarks* button to view or select the pre-set Branch, Agent, and Client Remarks. Branch remarks are entered by the Database Administrator, but Agent and Client Remarks can be entered by clicking on the *Res Card Remarks* tab in the profile.

Include in Voucher Remarks: When option is checked off, the voucher remarks entered will appear on the receipt AND land in TBO and be contained in the voucher when queried. The remarks are limited to 500 Characters that fall into TBO.

Include in Payment Remarks: When option is checked off, the voucher remarks entered will land in TBO and be contained in the payment when queried. The remarks are limited to 500 characters that fall into TBO.

Note for Voucher/Payment Remarks: You can globally set up these formats and put in default remarks by going to **Utilities|Branch|Receipt Settings**. But these can be changed on a receipt-by-receipt basis.

Click *Preview* to view a draft of the receipt without issuing the receipt. Click *Issue Receipt* to save the receipt as a voucher and generate the receipt report for printing, e-mailing or viewing in Word.

Notes: Receipt Headers/Footers have been added to the Global Defaults and Branch Page settings for further customization including setting up your agency logo and letterhead. To disable this feature for any particular user, check the field *Disable Ability to Issue Receipt* from within the *Other Restrictions* tab of the *Advanced User Permissions* within the User Login record.

Need to reprint a voucher? Go to the client's profile *Payment Tab* and click *Re-print Receipt.* These receipts show up as *Deposits on Amount* in *Trip Statements* generated from a Res Card.

Print: Click the *Print* icon to print out details of the profile, or a customer survey, which can be e-mailed to a client in the form of a .pdf (Adobe) file, by clicking on the e-mail icon in the preview toolbar. *(A window appears just before launching the detailed profile report which includes a listing of the tabs of information you can include in the report. These settings will be remembered each time you run this report. Options include: General Information, Traveler Information, Profile PNR Entries, Marketing Information, Profile Remarks, Cards, Activities (last 3 for each type), Res Cards (last 3), Travel History (last 5), More Fields, and Groups (last 3).)*

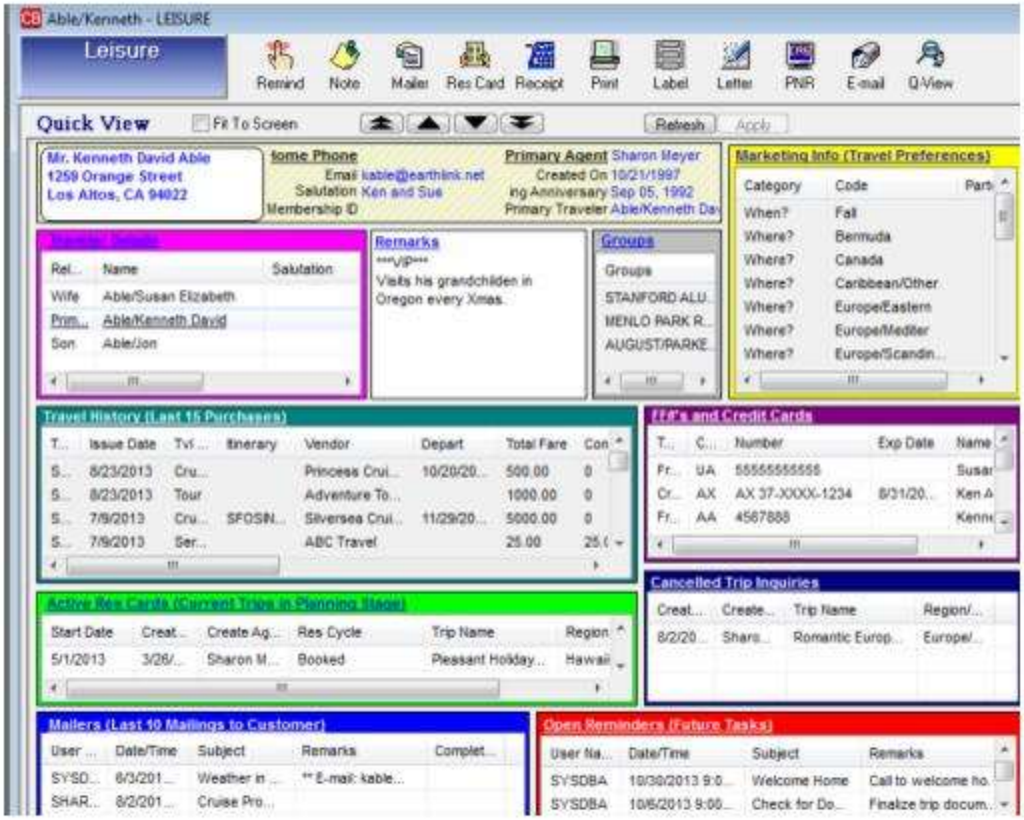
Merge to Label: Click the *Label* icon to create a label that can be used on a letter, brochure, passport reminder and more. Create a mailer when you click *Print*, so that a record of the mailing is in the customer's record.

Merge to Document Template: Click the *Letter* icon to merge client name and address to any letter contained in the document templates. The letter can be customized by the agent for a personalized touch. Create a mailer when you click *Print*, so that a record of the mailing is in the customer's profile.

Merge to PNR: Click the CRS icon to merge profile and traveler details into your reservation system PNR, including Apollo/Galileo, Amadeus, Sabre and Worldspan.

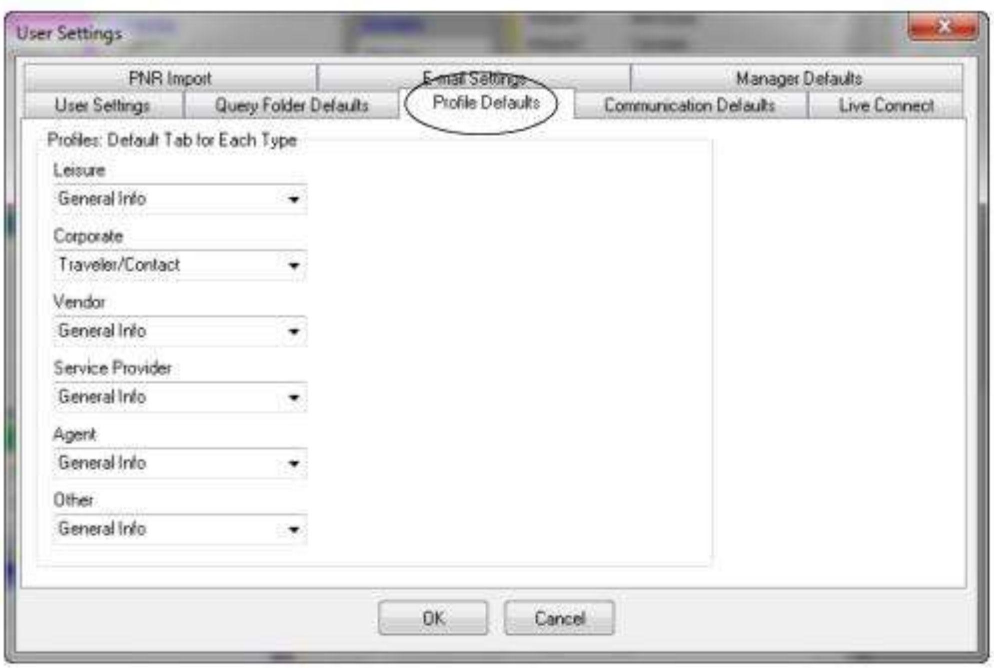
Merge to E-mail: Click the *E-mail* icon to merge client information into an e-mail message.

Q-View (Quick View): A single click provides you with a summary of key profile data across many tabs of information including: *Address, Top 2 communication entries, Salutation, Primary Agent, Profile Create Date, Top Special Date Entry, Traveler Details, Remarks, Groups, Marketing Info (Travel Preferences), Travel History, FF#'s and Credit Cards, Active Res Card listing, Cancelled Res Card listing, Mailers,* and *Open Reminders*.



Check the *Fit To Screen* to get a better view, and click again to go back to the original profile configuration.

You have the ability to Quick View the default display when opening an existing Leisure or Corporate type profile. Go to **Utilities|My Login|Profile Defaults** and select *Quick View.* (This can also be done by the Database Administrator in the SYSDBA login by going to **Utilities|User List|Profile Defaults.**



Header Information

The header conveniently displays pertinent information including the current mailing address, the first five communication entries captured for this profile, number of Marketing Codes, Primary Traveler, Groups, Voucher Balance, Primary Agent, Profile Create Date, Salutation, Interface ID, and Profile No. By confirming the accuracy of this information, and adding any new details each time a customer calls, the agent ensures that the client's information and therefore the agency marketing data is always up-to-date.

The header displays the first five Communication entries, in the order they are listed on the profile's Communications tab. If there are not five entries at the profile level, then the primary traveler's communications are displayed next, in the order they are listed on the primary traveler's communications tab. If there still are not 5 communications to display, then ClientBase picks up from the other travelers listed on the Travelers tab, in the order they are listed there, until all five slots are filled.

The items in the header are clickable. When clicked, the user is taken to that section of the profile. For example, when the Marketing Codes count is clicked, the Marketing tab opens; when the Primary Traveler is clicked, that Traveler record opens.

Scrolling Arrows

The four black arrows provide the ability to move among the profiles included within the current Query in the results screen. Clicking the up arrow displays the profile preceding the one you are in, the down arrow displays the very next profile in the Query. The double up arrow takes you to the first profile in the Query, and the double down arrow takes you to the very last profile in the Query.

Profile Indicators

Indicators to the right of the arrows appear if:

The top icon indicates the customer has an active Res Card indicating travel arrangements are in the works. The middle icon indicates there is previous Travel History for this client has previously purchased travel. The bottom icon indicates there's an open reminder alert for this customer. None of the above icons appear in the profile if the client has no Res Card, open reminder or past travel history with your agency.

Control Buttons

When any changes to the profile are made in a profile, the screen automatically turns turquoise to alert you that changes have been made:

Close: Takes you out of the profile and only appears if there are no unsaved changes made to the profile.

O.K.: Saves any information that has been added, modified or deleted and exits the profile.

Apply: Saves any information that has been added, modified or deleted and keeps you in the profile.

Cancel: Appears only if the profile has changes that have not been saved and prompts if you want to "Save changes before closing?" If *Yes* is selected, it saves the changes and closes the profile. If *No* is selected, it cancels the changes and closes the profile. If *Cancel* is selected, it returns you back to the profile without saving any changes.

Information Tabs

Each profile contains the following information tabs: **General Info, Communications, Remarks, Marketing, Travelers, Activities, Travel History, Cards, Res Cards, Payment History, Attachments, PNR Entries, More Fields, Groups, and Res Card Remarks.**

See detailed review of each of these tabs in section entitled, *Detailed Review of Folders* at the end of this chapter.

User-Defined Fields

Profile records are made up of many different types of fields. Some are free-flow, some capture date formats, others may capture numeric entries and so on. User-defined fields are free-flow fields that also allow your agency customize the drop-down lists for selection. While other data entry fields are labeled in black, user-defined fields stand out because they are labeled in blue.

To select an item from the global drop-down list of choices created by your agency, click the down arrow located to the right of the field and select from the list. By clicking any of the items within the list, you complete the field instantly while at the same time, conform to a consistent way your agency wants to capture that information. Edit the global list of drop-down choices created by your agency by doing one of the following:

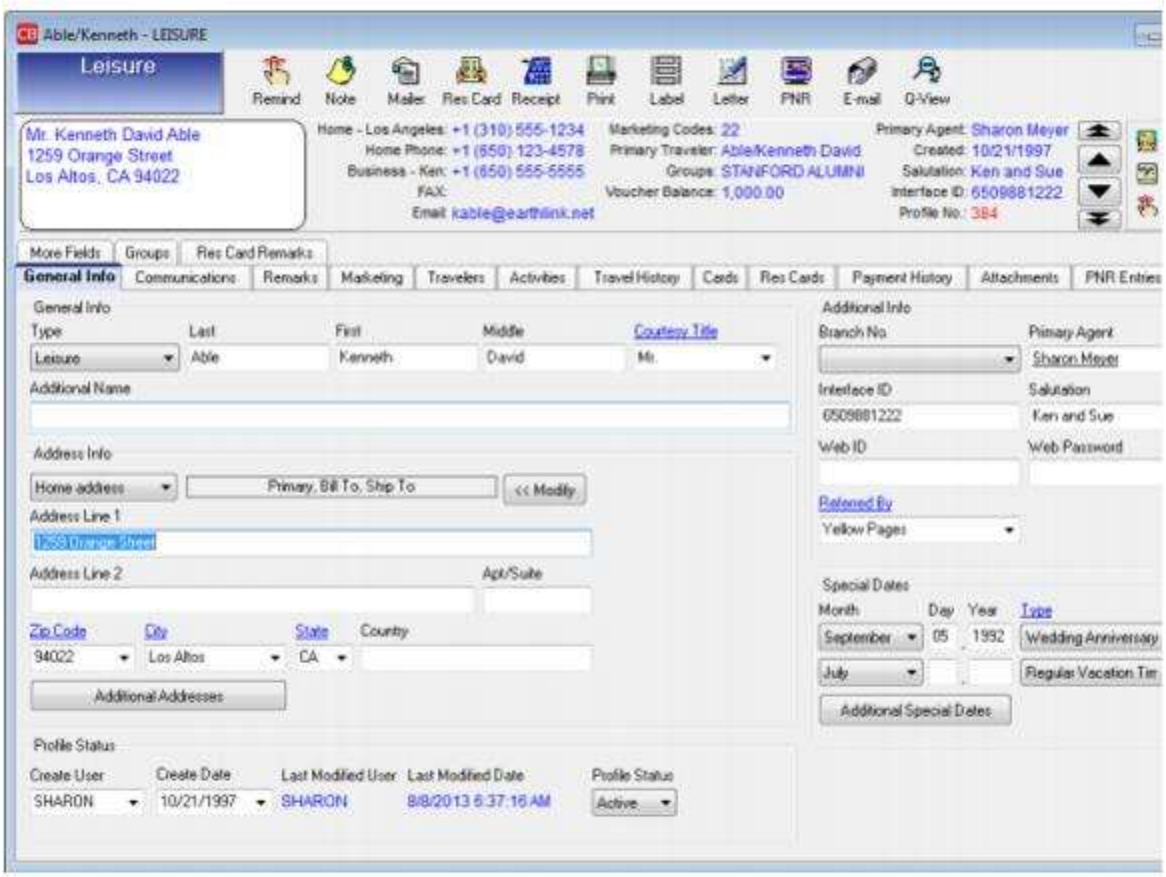
1. Click the field name (the field name is in blue to suggest a link to the list). By clicking any profile blue field label, a global list of drop-down choices appears to *Add, Modify* or *Delete*. Any changes made here permanently change the global list, but do not change any data fields captured to date.

2. Go to the Global Defaults|General Setup|User Defined Fields menu. From this area select the field you would like to customize from the drop-down list to the right of the field.

Modify the global drop-down list by using *Add, Modify or Delete*. Any changes made here permanently change the global drop-down list, but do not change any existing profile data fields captured to date.

Detailed Review of Folders

General Info Tab



The *General Information* tab displays the primary client data for this household or business. Use the <Tab> key to move from field to field and <Shift><Tab> to move backwards from field to field; or click the desired field to enter data.

GENERAL INFO

Type: Defaults to type (leisure or corporate) that was selected when profile was created. Change the profile type at any time; however, by simply selecting from the drop-down menu.

Company*:* In a corporate profile, enter the name. Any printed reports or labels can include the *Company* name entered in the general Info folder.

Last Name**:** Enter the last name of primary contact in household or business. Any printed reports or labels can include the *First* and *Last Name* entered in the general info folder.

First Name**:** Enter the first name(s) of the primary contact(s) in this field.

Middle**:** Enter the complete middle name of the primary contact in the field.

Courtesy Title**:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. The drop-down menu allows you to select from a lengthy standardized list. This courtesy title is printed on mailing labels or on letters in the document templates. This field can be customized by going to **Global Defaults|General Setup|User Defined Fields|Courtesy Title**, or by clicking the blue field name.

Additional Name: This field is for capturing another name within a single household. For example, John Smith has a wife Mary but Mary still uses her maiden name of Jones. All correspondence should be addressed to both John and Mary. Enter John's name in the Last/First fields and enter Mary Jones in the new additional name field. Mailing label would appear as:

John Smith

Mary Jones

Address

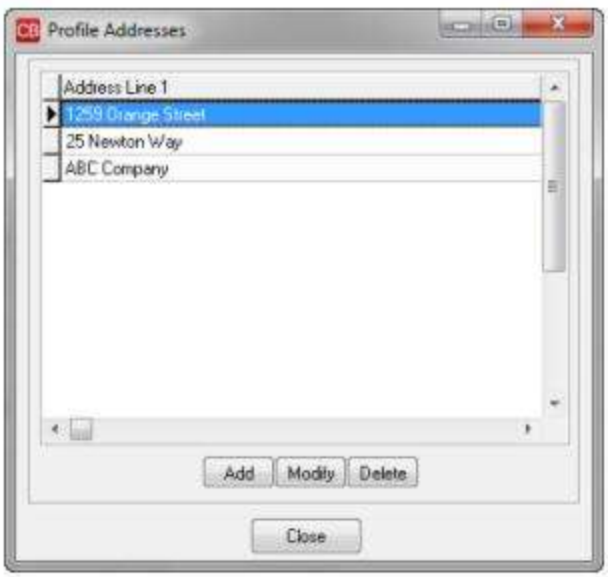
City, State Zip

The additional name field is a one line field and can contain up to 80 characters. This field can be merged to Documents, Labels and E-mails. It is also now a part of Level 2 and Level 3 profile queries. When creating a new profile the additional name entry is also added to the Travelers tab by default.

ADDRESS INFO

A client profile can include an unlimited number of addresses and they may be designated as *Primary, Bill To, Ship To, Second Address* and *Alternate Address*. Only one address though may be assigned as *Primary*, one as *Bill To* and one as *Ship To*.

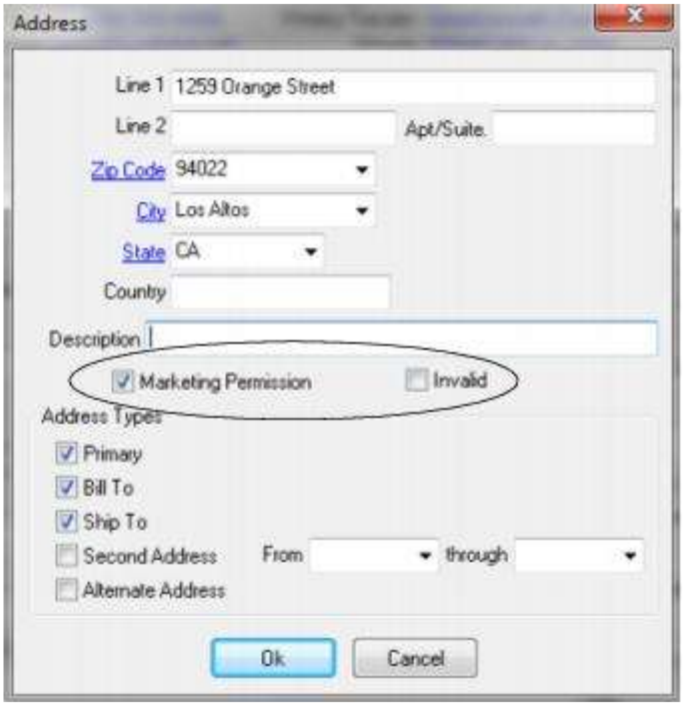
Assuming the address to be captured is the default type of *Primary, Bill To* and *Ship To*, then the address fields of *Address Line 1*, *Address Line 2*, *Apt/Suite, Zip Code, City, State* and *Country* can be entered right from the main screen. To capture additional address entries, such as a second address or alternate address, click *Additional Addresses*.



From this area, you can setup a different *Bill To, Ship To, Second Address* and *Alternate Address* along with a description for each. The second address choice offers a date option. This is particularly useful because it allows entry of a specific time frame your client may be residing at the second address. This time frame can be taken into account when generating labels and document templates from *ClientBase*.

If multiple address records are captured for a given profile, an easy way of viewing each address record is by clicking *Additional Address*. This displays a drop-down list of each address record. Centered just above the Address Line 1, in a gray box, is the current address type/s associated with this address record.

If a customer does not want to have marketing materials sent to the address, uncheck this box.



There is also an *Invalid* checkbox for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the *Invalid* box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update.

Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all *Merge To* features and reports.

Zip/City/State/Country: Wonder why we put the zip code ahead of the city and state? We did this purposely to try and save you data entry time, and to make sure complete addresses are entered. For many agencies, it is common that a large percentage of the profiles captured are regional to their location. With this in mind, the global list of drop-down zip codes created by your agency can default the desired city, state and zip. For example, let's say there are several clients in Rancho Palos Verdes, CA 90275. Add 90275 to the drop-down list of zip codes, and at the same time default the city to Rancho Palos Verdes, the state to CA and the country to USA. Any time you add a client to your database in this area, by entering the zip code and tabbing, the city and state automatically defaults.

One last point is when it comes to agency databases, zip codes are notorious for being incomplete, incorrect or just overlooked entirely. Placing the zip code before the city and state emphasizes the importance of this field.

PROFILE STATUS

Create Date/Create User: These fields default to the system date and the user logged in at the time the profile is created. Both can be modified, but can be disabled by the database administrator. Agencies use this field to query for new customers so that "Welcome to the Agency" letters can be mailed. These fields can also be used to query for management reports reflecting user productivity in creating new client profiles.

Last Modified User/Last Modified Date: This area indicates the last time a profile was modified and by whom.

Profile Status: Indicate whether a customer profile is active or inactive by choosing from the drop-down menu. By default all profiles start with an active status. An inactive status has been included, since you cannot delete a profile that has invoices and payments attached. When querying, only profiles marked as active are included in the search, but you can perform a Level 2 search to view inactive profiles.

ADDITIONAL INFO

Branch No.: For agencies with multiple branches, this field allows an agent to select from a drop-down menu the branch at which this profile was created or that you want the profile associated with. Branches are setup in **Utilities|Branch**.

Primary Agent: This field defaults to the login agent at the time the profile is created. It can be modified to represent the appropriate agent considered primary to the customer or left blank.

Interface ID**:** In order to easily and consistently identify an existing customer or vendor within different applications used within the agency (*ClientBase*, your GDS, your Back Office etc.), a unique ID should be assigned to each profile. This ID is called the "Interface ID". As an example, this field is associated with the interfacing of records generated from the GDS (Front Office) to the agency accounting system (Back Office). If your agency works with client or vendor data within multiple systems then we strongly suggest creating a unique Interface ID for each profile. This field can be set as *Required* and a default *Value* can be automatically assigned when new profiles are created (see chapter *Setting Up ClientBase for Your Agency)*.

Membership ID: This field is used at the profile level to capture any special identification number assigned by the agency to the customer account. The database administrator has to set this up for use so it is visible in **Global Defaults|Profile Defaults|Membership ID Fields.**

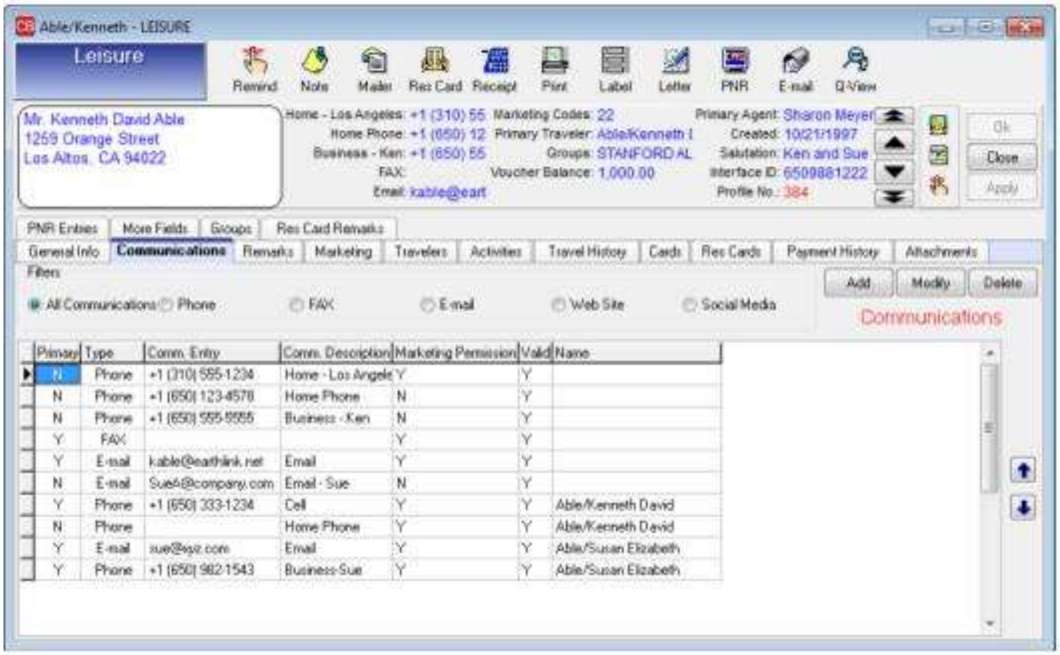
Salutation: The name used to greet the customer. For example, if Mr. Henry Wilkenson likes to be called “Hank,” enter *Hank* in this field. If Mrs. Emily Anderson likes to be called “Mrs. Anderson,” enter *Mrs. Anderson* in this field. Or, if you have a couple and want to include both names when addressing letters, enter *Hank and Emily*, or *Mr. & Mrs. Anderson*.

Web ID/Web Password: If your agency is interested in using your website to collect and update customer information, these fields may become important, as most systems require a Web ID and Password to provide access to this type of customer information. Advise your website designer that customer data can be easily exported and imported from *ClientBase* and integrating these ASCII files with your website is something they may want to consider. There is also an XML Import and Export utility for efficient data exchange. E-mail support@*Trams*.com for more information.

Referred By: By using the drop-down menu, enter how this client was referred to your agency. Customize this field by going to **Global Defaults|General Setup|User Defined Fields|Referred By**, or by clicking the blue field label. Statistics can be obtained from *ClientBase* reporting to get a bird’s eye view of how new customers are learning of your agency. What a great way to evaluate the effectiveness of your advertising!

Special Dates: These fields are particularly useful to record unique dates for each specific customer. Enter the day/month/year (or any combination of these date fields) of the special date and choose the type by clicking the drop-down menu. Items in this list can be customized by going to **Global Defaults|General Setup|User Defined Fields|Special Dates**, or click on the blue label in the profile. Imagine the marketing possibilities, when several months before an anniversary, or vacation time, your agency suggests as a gift a trip reflecting the client’s preferences. By clicking *Additional Special Dates*, unlimited dates can be added. **Tip:** Birthdays do not go in this area. Best practice is to put them into each traveler’s info area.

Communications Tab



The Primary Phone, Primary E-mail, Primary Fax, and Primary Web are displayed in the list of Travelers/Contacts on the Travelers or Contacts tab in the profile (in Leisure clients, this tab is called Travelers; in Corporate clients, this tab is called Contacts.) The first Communication entry of a given type is marked as the Traveler's Primary (Primary box checked.) Subsequent communication entries of that type default to unchecked.

By using the radio button on the top of the results screen, users can filter to view only one communications type at a time. Profile-level communication entries are displayed first, followed by the communications that are assigned to traveler/contacts. Traveler/Contact communications are in the order that they travelers are listed in the Travelers/Contacts tab. Profile level communications can be sorted using the blue arrows on the right side of the screen. These arrows are disabled when a Traveler/Contact communication entry is selected.

Add, Modify, or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the Traveler is linked to more than one profile. In that case, the user is warned, *This traveler is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

Need to copy a communication's entry? Right-click on the entry and select *Copy Phone, Copy E-Mail,* or *Copy Fax.* Then paste the entry into other applications as needed.

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Traveler: Select the name of the traveler from the drop-down. When adding a communication entry from the Traveler level, there is no option to change the traveler name by drop-down.

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries, as well as the Client Survey report.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Note: *ClientBase* formats e-mail entries with the special characters that the GDS does not accept which means the proper e-mail entry can be stored in *ClientBase* for e-mailing purposes, and those entries can be sent with the *Merge to PNR* accommodating the GDS formats:

Sabre: _ (Underscore) is translated as ==

Amadeus: _ (Underscore) is translated as U

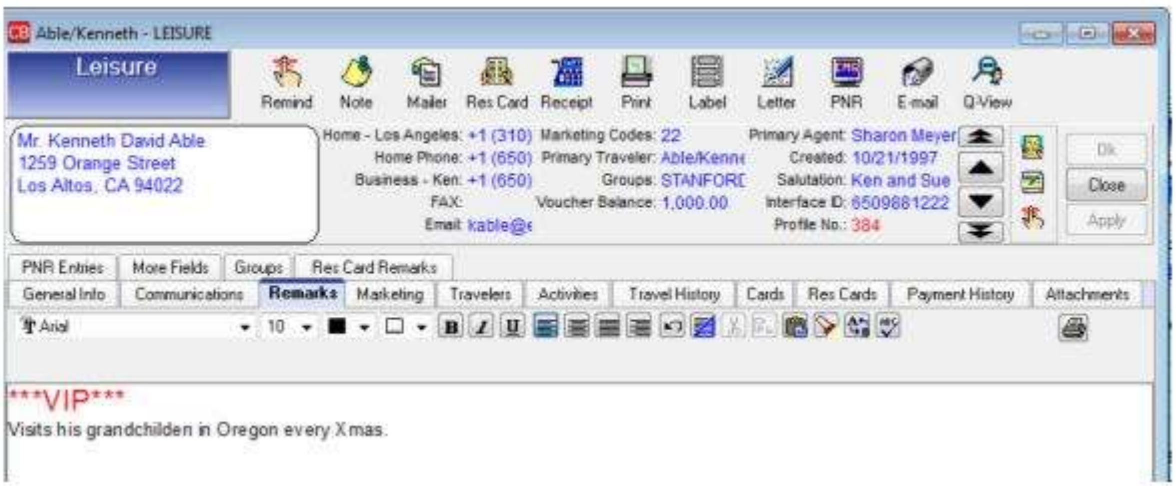
Worldspan: _(Underscore) is translated as @U@

Apollo and Galileo: _(Underscore) is translated as -- and @ is translated as //

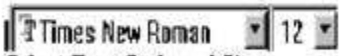
Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

Remarks Tab



The *Remarks* folder provides a full-page view of the unlimited remarks and provides tremendous flexibility for entering comments in each customer profile. The only limitation in the remarks folder is the amount of available disk space. View any miscellaneous comments about the customer from this screen. This area includes a mini-word processor allowing an agent to customize free-flowing remarks for the customer. Let’s take a quick tour of this toolbar:



Select Font Style and Size


Select Font Color and Background Color


Select Bold, Italics, Underline


Select margins to Left, Center, Justified or Left


Print Remarks and Access Printer Setup

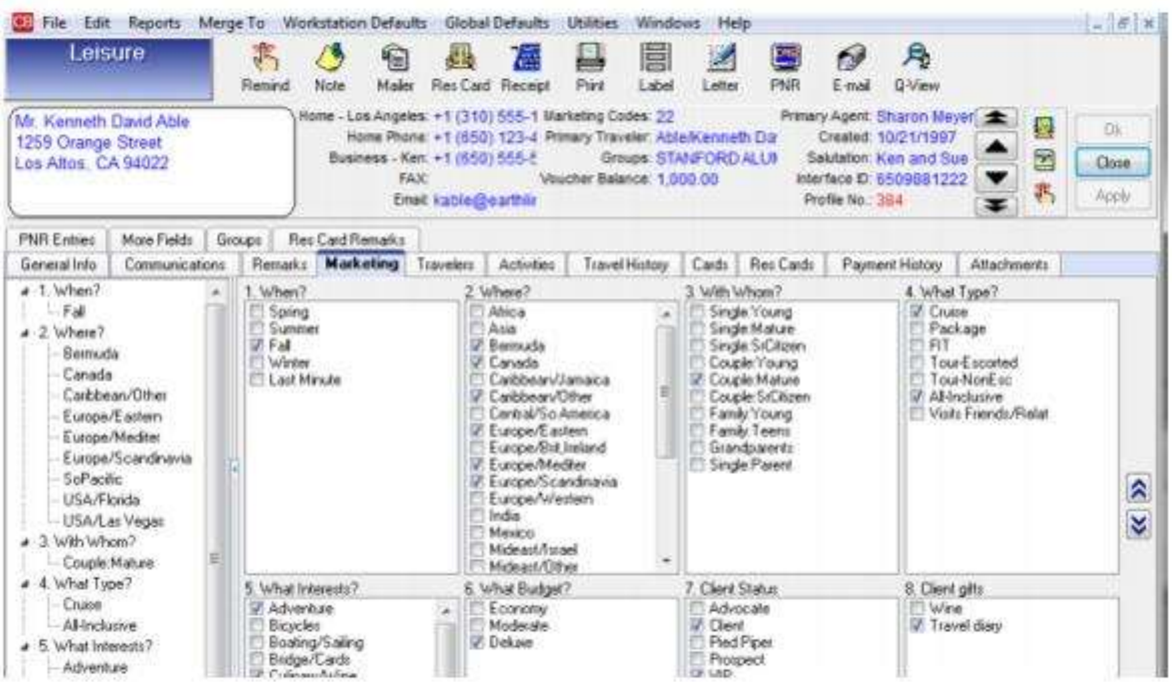

Cut, Copy, Paste


Find, Find and Replace


Set Tabs

Spell Check: Several dictionaries have automatically been installed onto each workstation running *ClientBase* providing you with the ability to identify misspellings within Document Templates. By default, while typing within any of these three areas, the spell check feature automatically underlines each misspelled word. Right-click on a misspelled word and you will be offered suggested spellings along with the ability to *Ignore, Ignore All* or *Add* to Dictionary. In addition a Spell Check button, labeled *ABC* has been added to the toolbar of the document templates allowing you to run the spell check routine across all data captured.

Marketing Tab



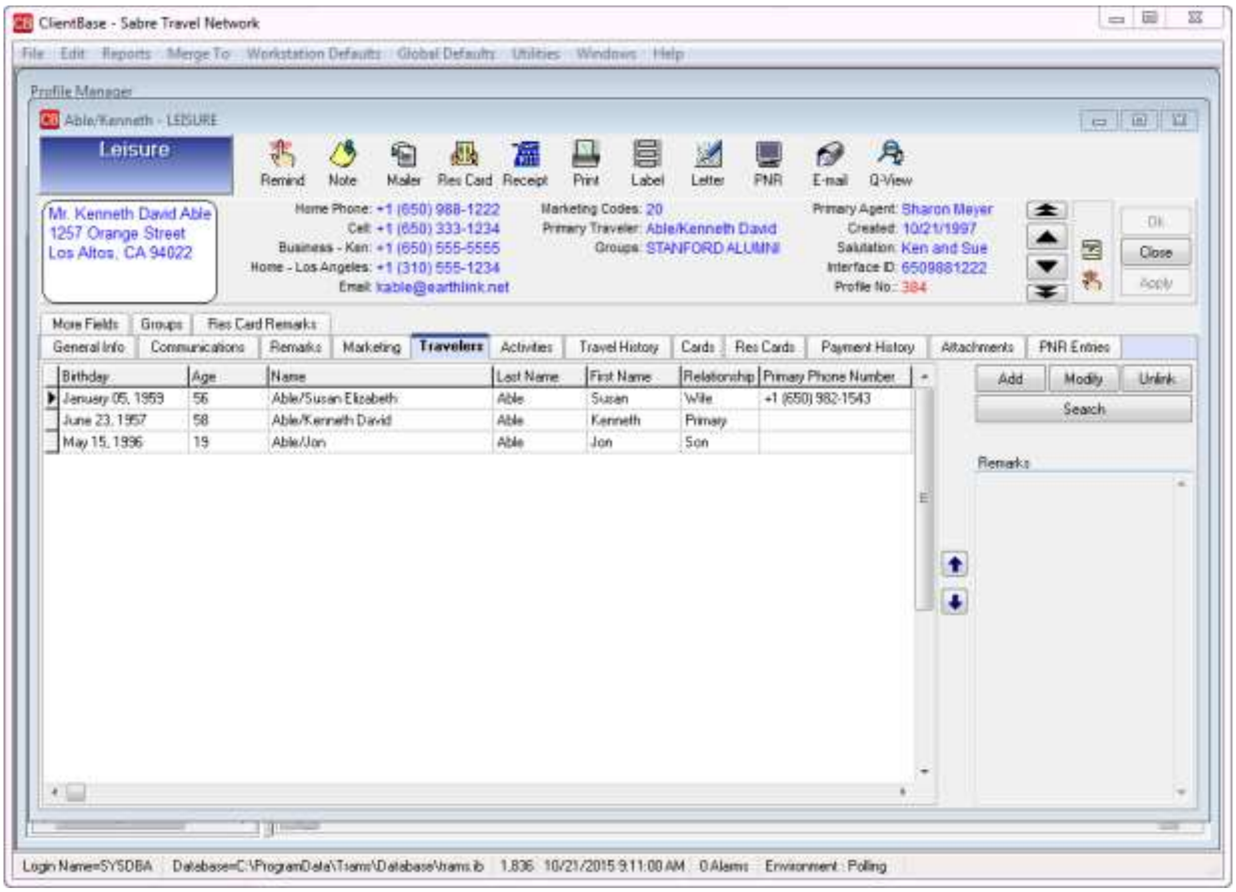
The *Marketing* folder provides the means of tracking client interests and travel preferences and arms selling agents with key information during the qualifying process of selling leisure travel. Marketing tables are powerful links to clients with common travel interests when planning a direct mail campaign or planning group travel. Reports showing the travel preferences of your customers are extremely valuable in matching up customers and travel specials.

The marketing tab contains an unlimited number of user-defined marketing tables. Each of the tables in this folder includes a user-defined header and an unlimited number of user-defined marketing codes. These headers and marketing codes are “global,” meaning the same tables are in every profile at every workstation.

When first installing the *ClientBase* software, some of the marketing tables come with default headers and default marketing codes. These default tables can be modified, enhanced, or deleted. The default tables are included to give users basic ideas about what information might be collected for effective marketing. For instructions on tailoring your user-definable marketing tables and marketing codes, please refer to the chapter of this manual entitled, *Set Up ClientBase for Your Agency*.

To select and insert marketing codes into a client profile, use double up and down arrows to scroll between tables. Select the codes that apply by clicking in the box on the left hand of each category. Notice that a summary of marketing tables and codes applicable to this customer is displayed on the left hand side of the screen. To de-select marketing codes, simply uncheck each box. Remember that customer’s needs often change. Removing marketing information when no longer valid is as important as entering new information.

Travelers/Contacts Tab



The Travelers tab (it’s called Contacts in a Corporate profile) is designed for entering detailed information on specific individuals who are part of a particular household or business. The blue up-and-down arrows allow re-ordering the list of Travelers/Contacts. (The sort order is reflected in Merge to PNR, except for Amadeus, which still requires alphabetical order. Sort order is not reflected in Reports, Res Card Traveler List, Live Connect or File Export. The Corporate, Vendor, and Other profiles have a "Reset Sorting" button which returns the list to alphabetical order.)

By highlighting a particular traveler or contact, you’ll be able to see any remarks entered in the traveler or contact record.

Add a new traveler/contact by clicking *Add*. When a user adds a new Traveler record, the database is first automatically searched for any existing Travelers that match. If a match is found, the user can select the existing traveler from the list presented and click *Link* to link the existing traveler. They may also click *Cancel* to return to their new Traveler.

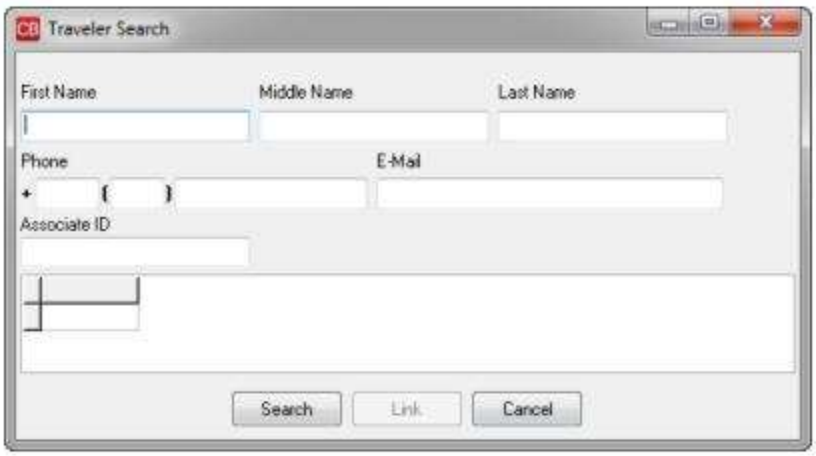
When clicking *OK* again, the new Traveler is created. Any data that was entered while creating the new Traveler that did not exist in the linked Traveler record will be transferred.

Example: An agent enters a passport number when entering a new Traveler. The agent clicks OK, and search finds an existing traveler record, but the existing record does not have a passport number. When the agent selects the matching traveler record, and data from the traveler record is populated on the screen, the passport information that was missing is now completed also.

Conversely: If data was entered and the existing Traveler record contains information in that field, the existing Traveler data is retained. *Example:* Agent enters First Name, Last Name, and a birthdate of July 1, 1960, and then clicks OK. The Traveler Search results screen appears, and the agent decides to select one of the existing Traveler records. The existing traveler has a birthdate of April 12, 1965. The existing birthdate information overwrites the one the agent entered. (Users can always go back and edit if the original information was incorrect.)

To modify or enhance a traveler/contact, click *Modify* while the name is highlighted. If *Unlink* is clicked for a Traveler that is not linked to any other profiles, then a prompt is presented warning that the Traveler will be deleted completely. If *Unlink* is clicked for a Traveler that is linked to more than one profile, then a confirmation prompt is presented, advising that the Traveler will continue to exist in the other linked profiles.

By clicking the *Search* button, you can search for a traveler or contact that is located in another profile and attach the traveler or contact to this profile as well.



Search by phone or e-mail address alone, or in combination with any of the name fields. If searching by name only, users must enter something in at least two of the three name fields.

Examples:

**User enters First Name of Ken and an e-mail address of ken@example.com. Ken Able, who has that address, is returned; Ken Jones, who does not have that e-mail address, is not.

**User knows the last name, but isn't sure exactly how the first name is spelled. He enters First Name A and last name Smith. All Travelers whose first name starts with A (Alice, Anne, Alex,) and last name starts with Smith (Smith, Smith-Jones) are returned.

**User knows that Mary Anne Jones has married, but doesn't remember the Traveler's new last name. She enters First Name Mary and Middle Name Anne. All Travelers with that first and middle name are returned.

**User knows the traveler's phone number and enters (650) 555-1212. All travelers with that phone number are returned.

Traveler/Contact Record

There are 8 tabs of information in a traveler/contact record:

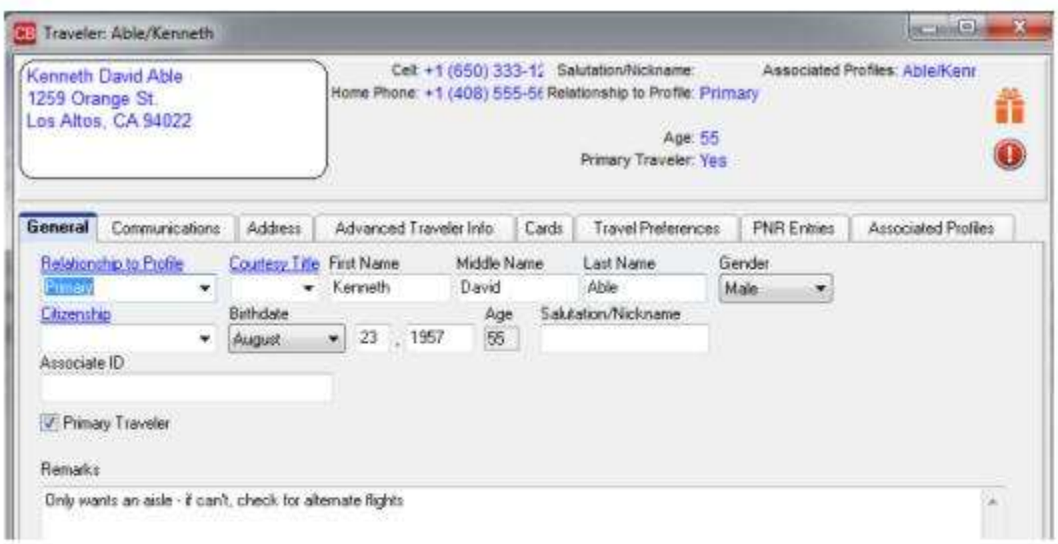
General, Communications, Addresses, Advanced Traveler/Contact Info, Cards, Travel Preferences, PNR Entries, and Associated Profiles. Let's take a look at how to organize information for each traveler/contact by going through each field of the add/modify screen.

Notice the header in the Traveler/Contact record, similar to the header of a profile. It displays Traveler/Contact Name, Address, Communications, Salutation/Nickname, Relationship/Position, Department, Age, Primary Traveler indicator, Associated Profiles, and Birthday and Expired Credit Card/Passport notification icons.

These two icons in the header are visual alerts of important dates:

A birthday present icon appears during the traveler's birthday month and disappears once the birthday month has passed. A red exclamation point icon appears if the traveler has an expired passport or credit card. Clicking on the exclamation point icon takes the user to Card record if it's an expired credit card, or to the Advanced Traveler Info tab if it's an expired passport. The icon disappears when the expiration date is updated.

GENERAL TAB IN TRAVELER/CONTACT RECORD



Relationship with Profile/Position: By choosing from a drop-down menu, these user-definable items can be inserted. (Go to **Global Defaults|General Setup||User Define Fields|Traveler Relationship** to set up for *Leisure* profiles and **Global Defaults|General Setup|User Define Fields|Contact Position** to set up for *Corporate* profiles; or simply click on the blue label to modify.) By identifying the traveler as a daughter or son in *Leisure* Profiles; Sales Rep or V.P. in *Corporate* Profiles, agents have an advantage when talking to a customer and can personalize their service.

***Courtesy Title*:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. The drop-down menu allows you to select from a lengthy customized list (setup by going to **Global Defaults|General Setup|User Defined Fields|Courtesy Title**, or click on the blue label). This courtesy title can printed on mail labels and letters.

First Name**:** Enter the legal first name of the traveler/contact in this field. This provides correct information for booking purposes.

Middle Name*: Enter the legal middle name (for international traveling purposes).

Last Name**:** Enter the legal last name of traveler/contact.

Gender*: Select traveler's gender from the drop-down menu.

Citizenship*: Enter traveler's citizenship from the user-definable drop-down menu (**Global Defaults|General Setup|User Defined Fields|Issuing Country/Citizenship**, or by clicking on blue label**).**

Birthdate***:** Enter traveler's birthdate including month, day and year, or any combination of those date fields. (If agent knows only month, enter it - you can Query database by month and send out your birthday cards!.)

Age: The Age field is auto-calculated based on the entries in the Birthdate fields. To auto-calculate the age, a year must be captured within the Birthdate and calculates based on the current date and the following logic:

- If a year but no month and day is captured, the Age is calculated based on Jan 1st of the birth year.

- If a month and year but no day is captured, the Age is calculated based on the 1st of the birth month and year.

- If a day and year but no month is captured, the Age is calculated based on Jan as the birth month.

Salutation/Nickname: This field allows a salutation or nickname to be entered for each traveler/contact. The Salutation/Nickname can be viewed in the Profile Manager results by adding the column to the Query screen.

Once a Merge to PNR rule is setup, the Salutation/Nickname can be merged to the GDS. Level 2 and 3 queries contain a filter for this new field, so you can Query by your client's nickname. Also, this field has been added as a merge field (Traveler/Contact Salutation) that can be used on labels, document templates, and e-mails.

Associate ID: This field is used at the traveler level to capture any special identification number assigned by the agency to the customer account. The database administrator has to set this up for use in **Global Defaults|Profile Defaults|Membership ID Fields.**

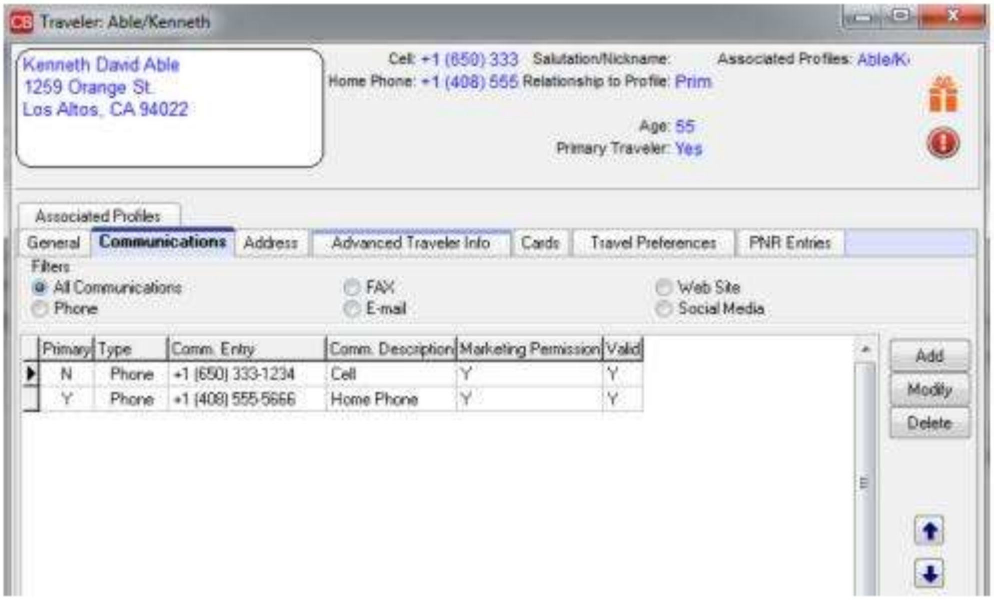
Department: In corporate profiles, there is a field to enter the contact's department.

Primary Traveler: Click here if this is the primary traveler or contact for this profile. By default, the box is checked for the first Traveler or Contact added to the profile, designating them as Primary. For subsequent travelers and contacts added, the box is unchecked by default. If a user checks the box when adding a new traveler or contact, designating them as Primary, the box automatically will be unchecked for the original primary traveler/contact. There can be only one Primary Traveler/Contact per profile.

Note: Because the Primary Traveler checkbox has been added, agencies may wish to use Global Modify to change the Primary relationship to another value, as the new checkbox provides a better way to identify Primary Travelers. Therefore, the field PROFILE.Traveler Relationship was added to the Profile Fields tab in the Global Modify tool. With a Traveler column included in the results of a query, it is now possible to use Global Modify to change the relationship of the Travelers to their Profiles in a batch.

Remarks: Enter unlimited free-flowing information pertaining to this traveler/contact.

COMMUNICATION TAB IN TRAVELER/CONTACT RECORD



By using the radio button on the top of the results screen, filter to view only one communications type at a time. Sort communications using the blue arrows on the right side of the screen. *Add, Modify,* or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the Traveler is linked to more than one profile. In that case, the user is warned, *This traveler is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Traveler: Select the name of the traveler from the drop-down. When adding a communication entry from the Traveler level, there is no option to change the traveler name by drop-down.

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries, as well as the Client Survey report.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Note: *ClientBase* formats e-mail entries with the special characters that the GDS does not accept which means the proper e-mail entry can be stored in *ClientBase* for e-mailing purposes, and those entries can be sent with the *Merge to PNR* accommodating the GDS formats:

Sabre: _ (Underscore) is translated as ==

Amadeus: _ (Underscore) is translated as U

Worldspan: _(Underscore) is translated as @U@

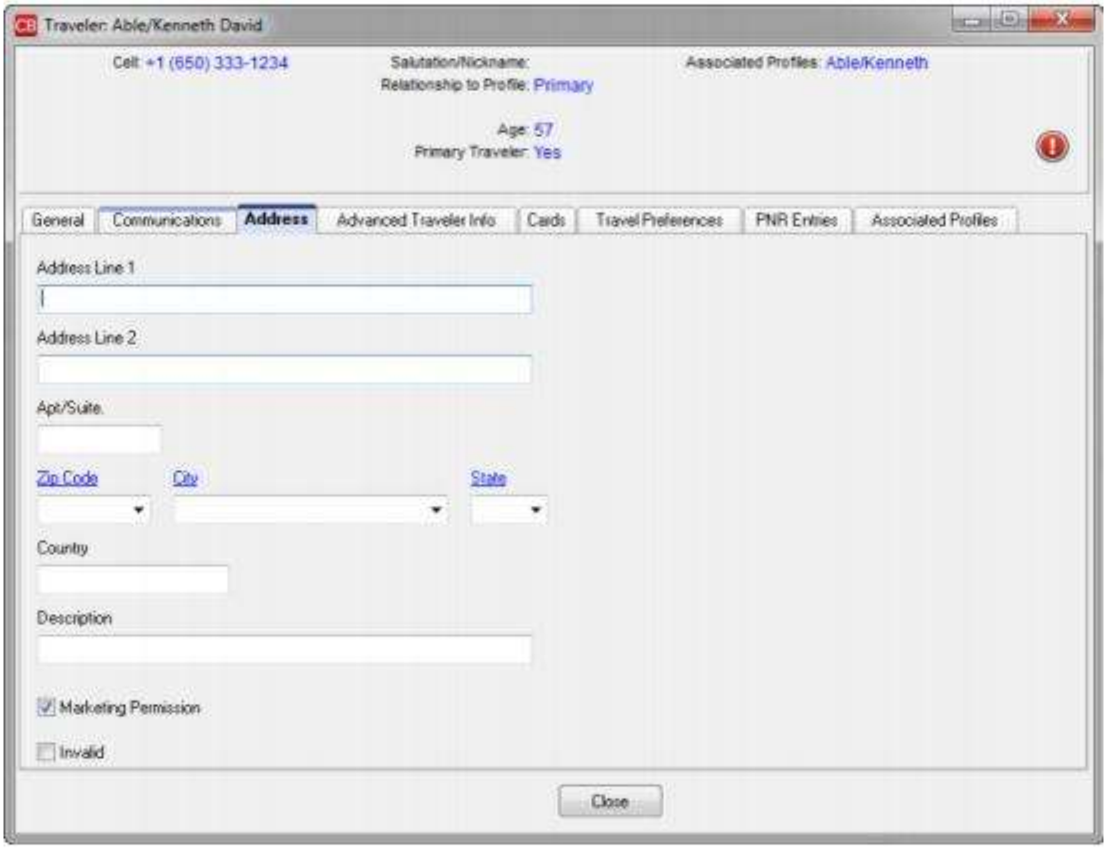
Apollo and Galileo: _(Underscore) is translated as -- and @ is translated as //

Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

ADDRESS TAB IN TRAVELER/CONTACT RECORD

Travelers/Contacts can only have one address. Traveler Address fields were also added to Select Columns and Sort By Columns in Profile Manager query results screens. A new Field Group called Traveler Address was created under Merge to PNR rules as well so that these addresses can be used when creating a PNR.



Address Line 1: Enter an address line for this traveler.

Address Line 2: Enter an additional address line if applicable for this traveler.

Apt/Suite: Enter the apartment of suite number.

Zip Code: Enter zip code. This Zip Code entry auto-populates the City and State fields if this is set up in User Defined Fields, as it does in Profile-level addresses.

City: Enter city.

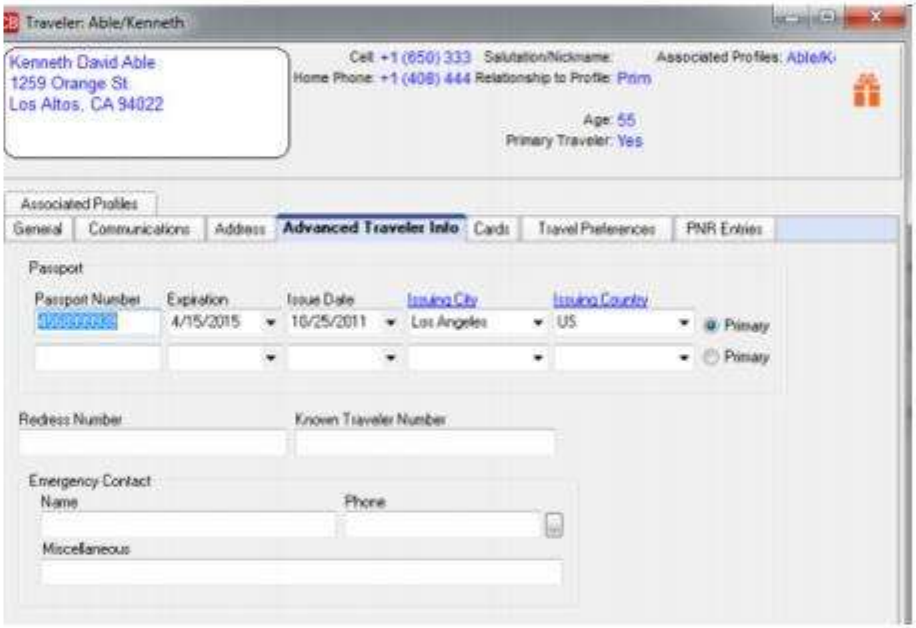
State: Enter state.

Description: Free-flow a description for this address.

Marketing Permission: Traveler/Contact addresses have their own marketing permission checkbox, which defaults to checked.

Invalid: Mark the address as *Invalid* until you can confirm correct one for this traveler.

ADVANCED TRAVELER/CONTACT INFO TAB IN TRAVELER/CONTACT RECORD



***Passport Number*:** For up to 2 passports, enter traveler's passport number.

***Expiration*:** Enter traveler's passport expiration date. This is a great field to Query on to send out letters alerting customers that passports are about to expire.

Issue Date*: Enter traveler's passport issue date.

Issuing City*: Enter traveler's passport issuing of origin from the user-definable drop-down menu (**Global Defaults|General Setup|User Defined Fields|Issuing City**, or click on blue label).

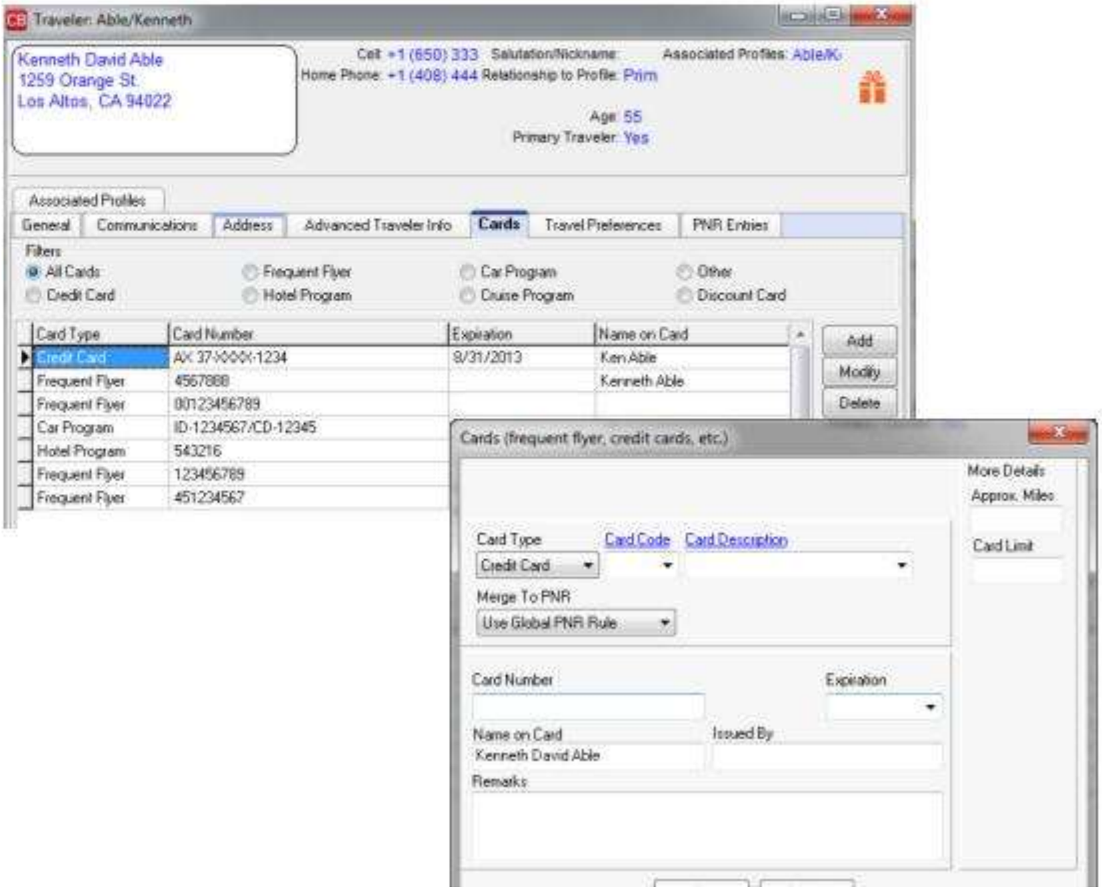
Issuing Country:** Enter traveler's passport issuing country of origin from the user-definable drop-down menu (**Global Defaults|General Setup|User Defined Fields|Issuing Country/Citizenship**, or click on blue label**).**

* Heightened security has increased the amount of traveler information agencies need to collect for international travel bookings:

Redress Number/Known Traveler Number: Use this area for TSA numbers assigned to traveler.

Emergency Contact: Emergency Contact information includes Name, Phone Number and a Miscellaneous text field to capture any additional information about the emergency contact such as the relationship to the traveler/contact. These fields can be set up as Required/Optional fields in Global Defaults and are also a part of the Traveler Miscellaneous fields for setting up Merge to PNR rules.

CARDS TAB IN TRAVELER/CONTACT RECORD



Enter frequent flyer, credit card, cruise program, and miscellaneous card information pertaining to this traveler. All cards entered at the traveler/contact level also appear within the listing of cards at the profile level. Click *Add* to enter a new card:

Card Type/Card Code/Card Description: Card types are *Credit Card, Frequent Flyer, Hotel Program, Car Program, Car Program, Cruise Program, Other and Discount Card.*

The *Discount Card* in the drop-down list of cards that can be selected in the Cards tab for use with discount programs such as AAA Memberships, AARP, etc. This card type is formatted exactly like all other card types (name, card type, card code,card description, number, expiration, etc.). Discount Card was added to Global Defaults|General Setup|User-Defined Fields to allow for customizing. Filter was also added to the Cards tab of Traveler/Contact and to the list of Field Group for PNR Rules. New type appears on Profile Detailed Report and the Client Survey report just like other card types.

By entering the *Card Code,* the *Card Description* is auto-filled.

Merge to PNR: By default any new credit card entries default to ***Use Global PNR Rule*.** With this setting credit cards continue to merge as they have in the past based on the global credit card PNR Rule. If this Merge to PNR setting is changed to *Always*, then regardless of the global PNR Rule for credit cards, the credit card defaults to being selected on the Merge to PNR Selection Screen. If this Merge to PNR setting is changed to *Optional*, then regardless of the global PNR Rule for credit cards, the credit card defaults to not being selected on the Merge to PNR Selection Screen. This feature gives you the ability to set the *Always/Optional* setting at the credit card entry level as well as the Global Defaults level.

Card Number/Expiration: Enter the *Card Number* without dashes and use the last day of the month it expires (*Expiration)* in the correct year.

Issued by/Remarks: These are optional fields to put additional data.

Name on Card: The name on the card should default to the traveler’s name. If someone else’s name is on the card, change it here.

Upon saving or editing Credit Card numbers, *ClientBase* validates the card number. Note: Upon saving or edit a credit card number, *ClientBase* now validates the card number. If the number is invalid, a prompt occur: *The credit card number entered appears to have a typographical error or it is not a valid credit card. Do you want to continue saving this record?* This prompt serves as a warning that there may have been a data entry error (typo).

Selecting **YES** saves the card As Is.

Selecting **NO** returns user to the card number field.

When editing an existing card number, validation does not occur unless the card number field is modified. Validation occurs in Profile Cards Tab, Invoice Form of Payment Credit Card and CC Merchant, Invoice Booking Payment Credit Card and CC Merchant, Reservation Payment Due Date tab, Receipt Form of Payment CC Merchant FOP.

***Valid credit card numbers with spaces do not prompt

***Valid credit card numbers with letters (VI1234123412341234) do not prompt

***Valid credit card numbers with expiration date after a slash (CA5458004519231383 /1109) will not prompt (although we do not recommend entering the expiration date in the CardNumber field.)

TRAVEL PREFERENCES TAB IN TRAVELER/CONTACT RECORD

Under this tab each travel category appears in a new tree view. Travel Categories are listed in the tree on the left side and Travel Preferences for each are on the right. This gives the ability to capture travel preferences globally by Travel Category, but also the ability to capture travel preferences for each preferred Vendor. It is not mandatory to have preferred preferences for a preferred vendor. It is also not mandatory to select preferred vendors for a client.

Click the Travel Category name to view and/or set up global travel preferences for the category. Preferences set up for the travel category will automatically default as the preferred preference for each preferred vendor selected for that category, however, the vendor preferences can be modified.

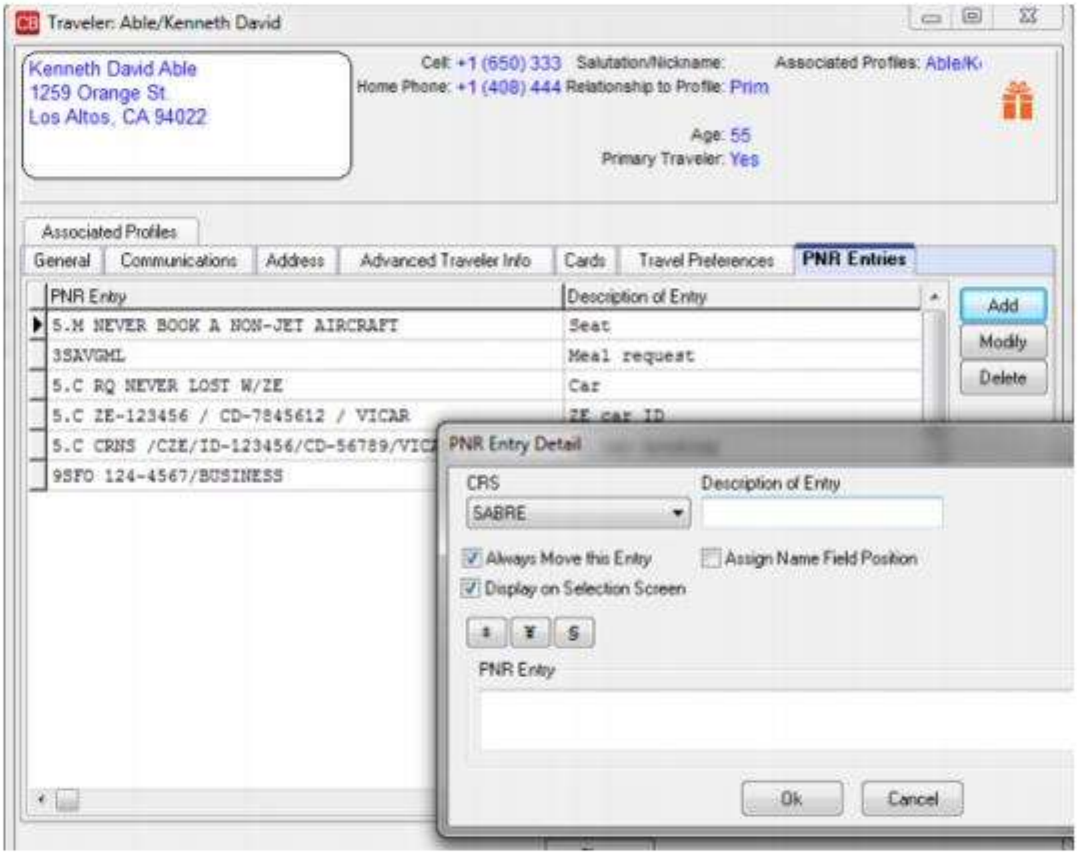
To add a preferred vendor, click the *Add* button at the bottom of the Travel Category tree. A *Find Vendor* screen is displayed. Select the Travel Category and the Vendor and click *OK*. Preferences are shown for the vendor based on the default preferences for the Travel Category. Make adjustments to the preferences as needed.

A new field, *Desirability* is available in preferences for future use with *Sabre Graphical Profiles*. The *Desirability* field is displayed when adding or viewing a preferred vendor. Desirability options appear as a drop down to select from. Selections are: *Do Not Use, Dislikes, No Preference, Favorable, and Very Favorable.*

All Travel Categories now use the user defined field Special Options. For Air Preferences, Meal Preferences is named Meal Type which links to a Meal Code field that was also added. Air Craft Type is available as a preference. For Cruise

Preferences, Ship Name and Departure Port are available as User Defined fields and are displayed as preference options. When using traveler columns in queries, the default global preferences are displayed in the query.

PNR ENTRIES TAB IN TRAVELER/CONTACT RECORD



In order to capture traveler-related PNR entries (such as general remarks, special meal requests, air/car/hotel preference, UDID's, etc.), a tab is included in the traveler/contact record for leisure and corporate client profiles. Use *Add, Modify,* and *Delete* to maintain specific PNR entries for each traveler. There are no limits to the number of PNR entries captured in this table. Each PNR entry is made up of the following fields:

CRS**:** Choose your CRS (GDS) system from the drop-down menu.

Description of Entry**:** Enter a free-flow description.

Always Move this Entry: By checking this box, the entry always moves when you do a move to CRS. If this box is not checked, you'll have a choice of moving the entry whenever you want.

Assign Name Field Position**:** When checked, automatically attaches the traveler's name position at the end of the PNR entry (e.g. 3SSRVGML**-1.2**).

Display on Selection Screen**:** Within each PNR entry or PNR rule that is set as *Always Move This Rule*, an option is included called *Display on Selection 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 screen is less complicated for the agent to review.

***PNR* Entry:** Enter the PNR entry the way you would in your reservation system and press *OK*.

For more information on moving data from *ClientBase* to your CRS PNR, please refer to the chapter, ***Putting Your Profiles to Work for You.***

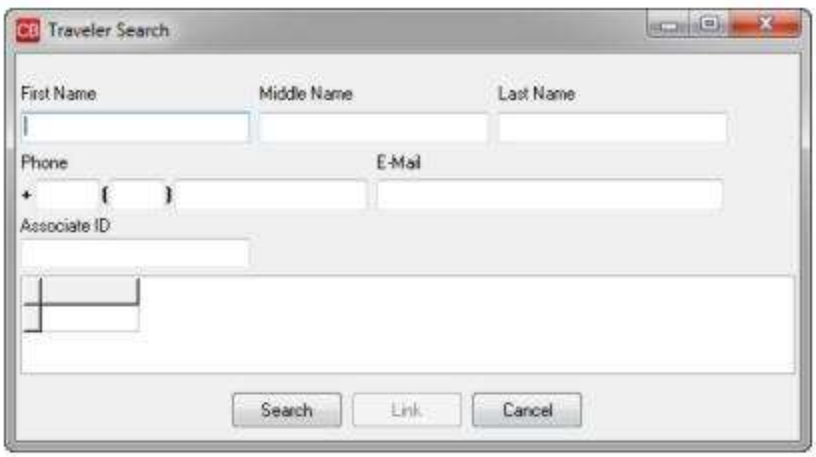
ASSOCIATED PROFILES TAB TRAVELER/CONTACT RECORD

This tab allows the user to view all the profiles that a given Traveler/Contact is linked to. By clicking *Open,* user has the ability to hop into another profile.

Linking a Traveler/Contact Record to another Profile

In *ClientBase*, you have the ability to link a traveler/contact record to multiple profiles. All data captured within the traveler/contact record is linked to the new profile.

Linking a Traveler/Contact Record:



1) Retrieve the desired profile to which you want to link a traveler/contact record. For example, you may want to link a leisure traveler/contact to a Corporate profile.

2) Click the profile Traveler/Contact tab and *Search*.

3) Type in at least 2 pieces of data in the search fields and *Search*.

4) When the traveler/contact result comes up, click *Link*.

5) All the traveler/contact data is now in the new profile.

TIPS: Search by phone or e-mail address alone, or in combination with any of the name fields. If searching by name only, users must enter something in at least two of the three name fields.

Examples:

**User enters First Name of Ken and an e-mail address of ken@example.com. Ken Able, who has that address, is returned; Ken Jones, who does not have that e-mail address, is not.

**User knows the last name, but isn't sure exactly how the first name is spelled. He enters First Name A and last name Smith. All Travelers whose first name starts with A (Alice, Anne, Alex,) and last name starts with Smith (Smith, Smith-Jones) are returned.

**User knows that Mary Anne Jones has married, but doesn't remember the Traveler's new last name. She enters First Name Mary and Middle Name Anne. All Travelers with that first and middle name are returned.

**User knows the traveler's phone number and enters (650) 555-1212. All travelers with that phone number are returned.

Activities Tab

This tab displays a complete history of all contacts associated with this specific client. Included are notes (record of interaction with client), reminders (record of scheduled past and future activities) and mailers (record detailing mailings sent to this client).

To add a new note, reminder or mailer, click *Add*; to modify, click *Modify*; and click *Delete* to remove entry. Notice the radio buttons located directly above the activities results screen.

This allows for quick filtering of the results appearing in this tab. By default all activities are displayed, but options for viewing just mailers, notes, reminders, or open reminders are available. Also, as you scroll through the various activities, the remarks for each activity are displayed directly to the right of the results screen.

For more information on activities, refer to the Chapters called *An In-depth Look at Activities* and *Using the Activity Manager to Manage Your Activities*.

Travel History Tab

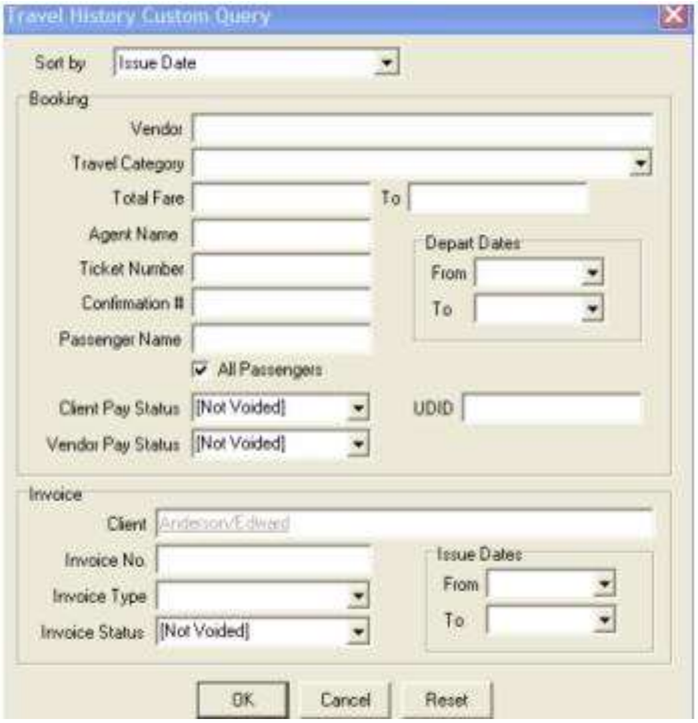
The *Travel History* tab is a read-only screen displaying a list of issued invoices (in TBO or *ClientBase*) for this client, providing easy access to past travel history, number of invoices issued, sum total of bookings, average booking amount and the total commission.

***Sort*:** Enter the way you want data sorted by using the drop-down menu to select *Issue Date, Depart Date, Travel Category, Traveler Name, Agent, Invoice #, Invoice Type, Invoice Status,* or *Ticket Confirmation #.*

Tvl Cat.: Filter the results by travel category by clicking the drop-down menu.

***Issue Date*:** Enter the from and to issue date, by clicking the drop-down menu to access a calendar or enter date. Click *Run Query* to display results.

By clicking *Custom Query*, a more detailed Query can be setup.

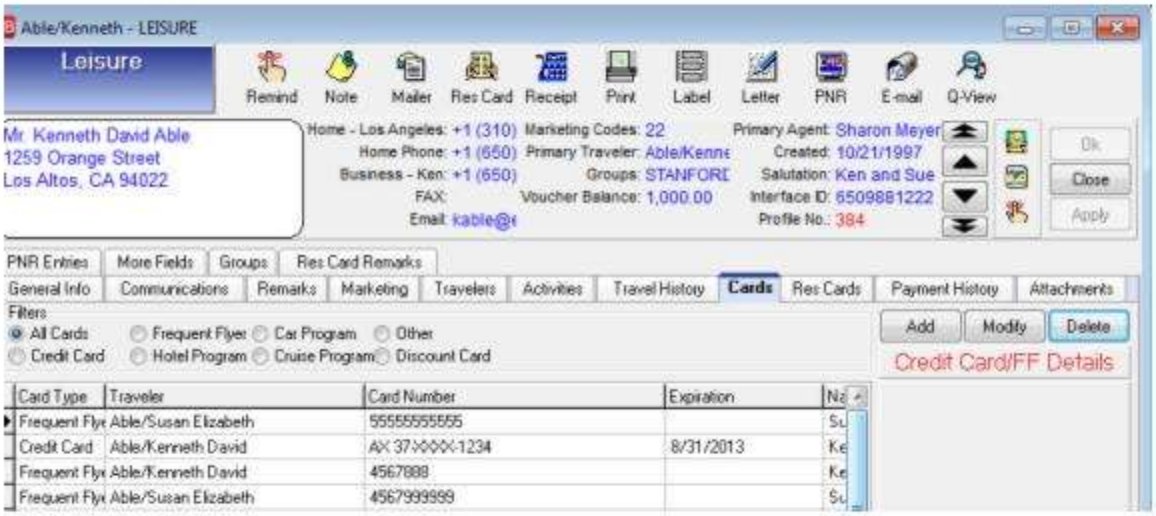


Click the down arrow by *Sort by Fields* to Query and filter the history results by any of the booking fields: *Vendor, Travel Category, Total Fare Range, Agent Name, Ticket/Confirmation #, Traveler Name and Depart Date Range. Profile Fields to Query on include: Client, Invoice No., Invoice Type, Invoice Status,* and *Issue Sales Date Range.*

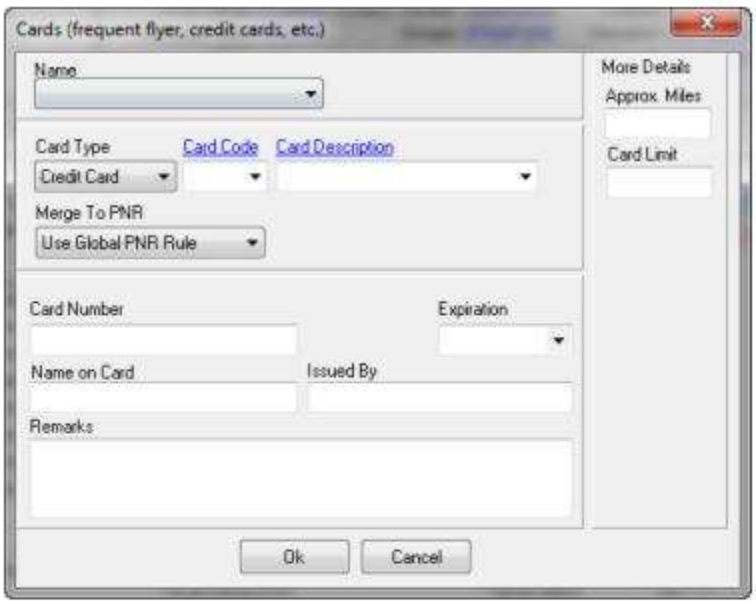
Hide Commission Totals: By default, this box is unchecked. Once checked, the red Commission numbers in the header are hidden. The checkbox setting is "sticky" - once checked, it remains checked for all profiles until it is unchecked. The Commission column is not hidden; customers who are using this setting may wish to drag that column off to the right in order to conceal it.

Quick Tips: Want to see the payment for a particular invoice quickly? Right-mouse click on the invoice line, and *View Payments for this Invoice number.* Or access the Res Card for the invoice you have selected by clicking the *Go to* button.

Cards Tab



Keep track of the traveler's/contact's credit cards, travel clubs, frequent flyer numbers, expiration dates etc. in the.



Only cards that are not linked to a traveler/contact can be modified or deleted from this profile area. If a user attempts to modify one that is linked to a traveler/contact, they will be prompted to continue to the traveler record and modify it or delete it from there.

(From the Traveler Cards tab, users can only access cards that belong to that traveler. The drop-down menu to select a traveler is only available when adding or modifying a card from the Profile Cards tab.)

Name: Associate the card with the traveler/contact by choosing the name from the drop-down menu.

Card Type/Card Code/Card Description: Card types are *Credit Card, Frequent Flyer, Hotel Program, Car Program, Car Program, Cruise Program, Other and Discount Card.*

The *Discount Card* in the drop-down list of cards that can be selected in the Cards tab for use with discount programs such as AAA Memberships, AARP, etc. This card type is formatted exactly like all other card types (name, card type, card code, card description, number, expiration, etc.). Discount Card was added to Global Defaults|General Setup|User-Defined Fields to allow for customizing. Filter was also added to the Cards tab of Traveler/Contact and to the list of Field Group for PNR Rules. New type appears on Profile Detailed Report and the Client Survey report just like other card types.

By entering the *Card Code,* the *Card Description* is auto-filled.

Merge to PNR: By default any new credit card entries default to *Use Global PNR Rule*. With this setting credit cards continue to merge as they have in the past based on the global credit card PNR Rule. If this Merge to PNR setting is changed to *Always*, then regardless of the global PNR Rule for credit cards, the credit card defaults to being selected on the Merge to PNR Selection Screen. If this Merge to PNR setting is changed to *Optional*, then regardless of the global PNR Rule for credit cards, the credit card defaults to not being selected on the Merge to PNR Selection Screen. This feature gives you the ability to set the *Always/Optional* setting at the credit card entry level as well as the Global Defaults level.

Cards entered at the traveler level also appear at the profile level and include a name field at the top of entry associating the traveler name with the card. Cards and the fields that make up a card entry are included in the PNR rules, can be formatted for your CRS, and included when using the Merge to PNR feature.

Card Number/Expiration: Enter the *Card Number* without dashes and use the last day of the month it expires (*Expiration)* in the correct year.

Issued by/Remarks: These are optional fields to put additional data.

Name on Card: The name on the card should default to the traveler's name. If someone else's name is on the card, change it here.

Upon saving or editing Credit Card numbers, *ClientBase* validates the card number. Upon saving or edit a credit card number, *ClientBase* validates the card number. If the number is invalid, a prompt occur: *The credit card number entered appears to have a typographical error or it is not a valid credit card. Do you want to continue saving this record?* This prompt serves as a warning that there may have been a data entry error (typo).

Selecting **YES** saves the card As Is.

Selecting **NO** returns user to the card number field.

When editing an existing card number, validation does not occur unless the card number field is modified. Validation occurs in Profile Cards Tab, Invoice Form of Payment Credit Card and CC Merchant, Invoice Booking Payment Credit Card and CC Merchant, Reservation Payment Due Date tab, Receipt Form of Payment CC Merchant FOP.

***Valid credit card numbers with spaces do not prompt

***Valid credit card numbers with letters (VI1234123412341234) do not prompt

***Valid credit card numbers with expiration date after a slash (CA5458004519231383 /1109) will not prompt (although we do not recommend entering the expiration date in the CardNumber field.)

Res Cards Tab

This tab contains all the res cards that were created for this customer. A res card is a "trip folder" containing all the information for one trip to automate manual or Live Connect reservation data (bookings made outside of your CRS), generate itineraries and invoices that automatically go into *Trams Back Office*. It also tracks reservation totals, invoiced totals and un-invoiced balances.

Notice the radio buttons located directly above the res card results screen. These allow for quick filtering of the results appearing in this tab. By default all res cards are displayed, but options for viewing just *Active, Departed* or *Cancelled* Res

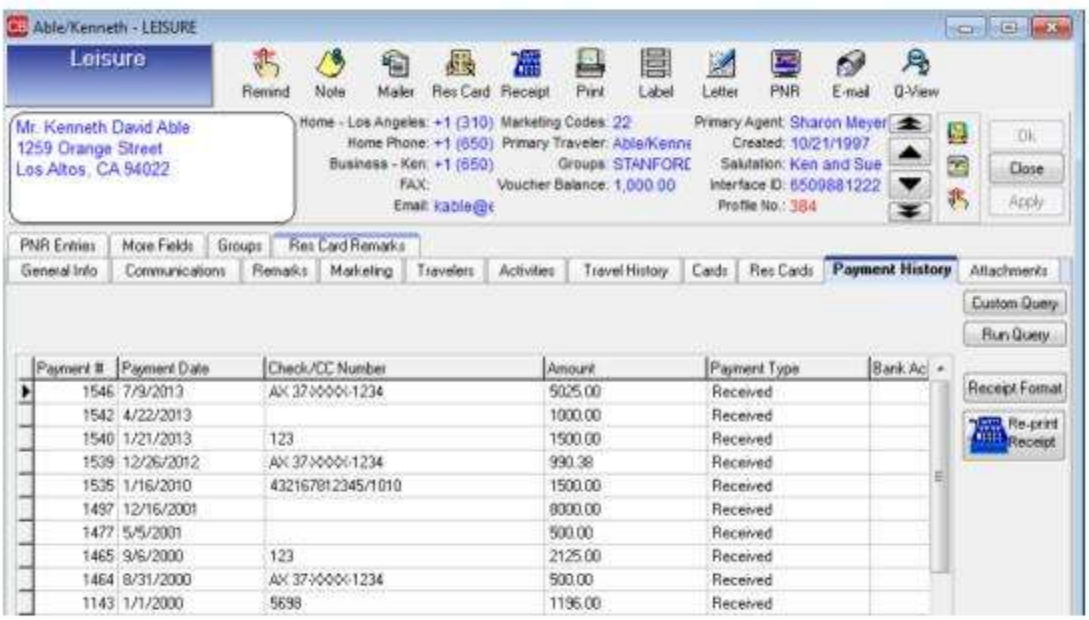
Cards are available. To create a new res card, click *Add;* to modify, click *Modify* or double-click the highlighted entry; and click *Delete* after selecting a card to remove.

COPY AN ENTIRE RES CARD FROM ONE PROFILE TO ANOTHER - Most of the data captured within the res card can be copied including general res card information, reservation records and agent remarks. The data that does not copy includes the res card create date, invoices, activities, client feedback about trip, profile-specific information (such as the bill to/ship to addresses) and traveler related fields (such as traveler names, seat assignments, ticket numbers, etc.). To copy an entire res card, highlight the one to copy (do not open the res card) and click *Copy*. Next, close the profile, and retrieve or create the profile you want to copy to, select the res card tab and click *Paste*.

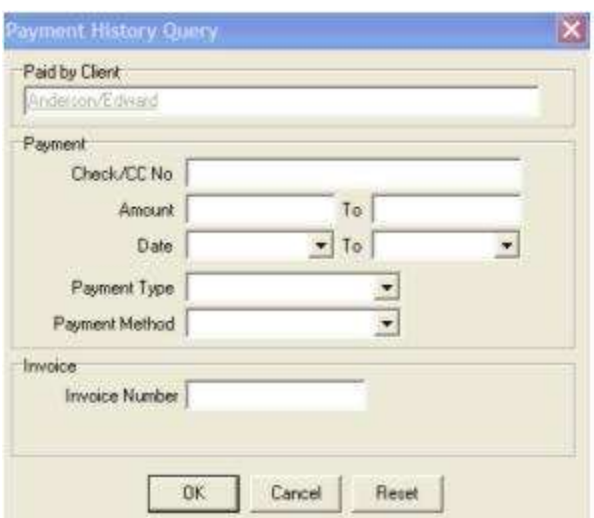
There are so many wonderful features and details of the Res Card that it has its own chapter! refer to the chapter entitled, *An In-Depth Look at Res Cards*.

Payment History Tab

View actual payment information from *Trams Back Office* including dates paid, amounts, check numbers, etc. Agents can now easily discover if a payment has come in from a client or has gone out to a vendor. Since payment information for the various types of profiles may be considered privileged information, this tab (along with any other tab included in a profile) can be turned on or off by using the advanced permission settings within each user login record.



When this tab is opened, it automatically reveals payments made by the client. To sort the list, click *Custom Query*, fill in specific criteria and click *Run Query* to have specific payment info displayed. Fields include *Check/CC No; Amount; Date Range; Payment Type and Payment Method.*

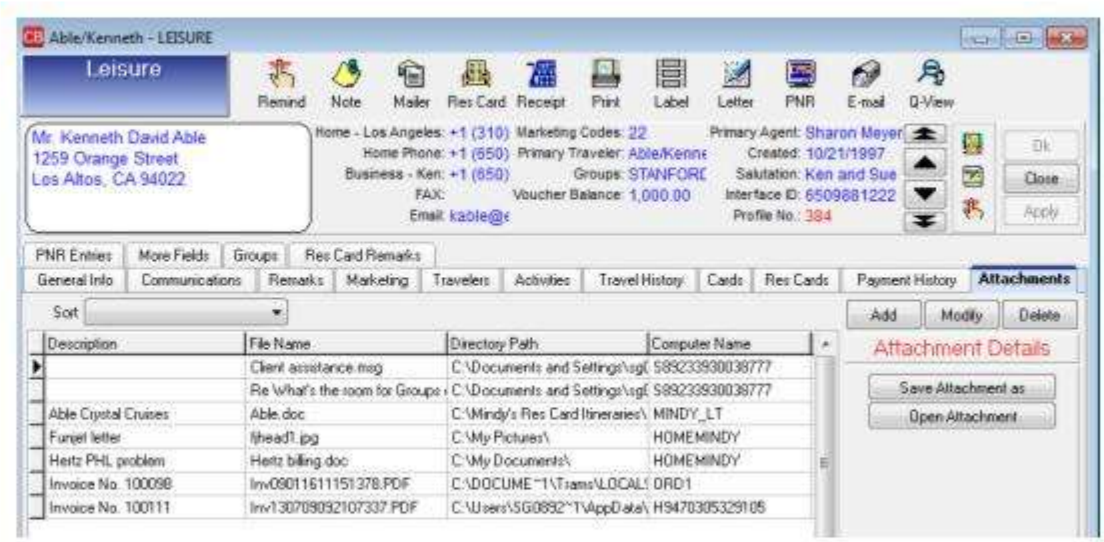


Receipt Format: Check out the way the receipt has been formatted by the database administrator in this area.

Re-print Receipt: Re-print a receipt that has already been issued by going to the Payment History tab, highlighting the appropriate Payment Received and clicking *Re-print*. This reprint feature only works on payments received that have been applied to a voucher, and are for pay methods of cash, check or cc merchant. If you want to reprint the receipt adding or deleting original receipt remarks, click *Receipt Format* and check or uncheck any Agent or Client Remarks. (Agent and Client Remarks can be added in the *Res Card Remarks* tab of agent or client profiles.)

Attachment Tab

To enhance the amount and type of information accessible in a 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 referred to as *Attachments*. To access an attachment at the client level, click the *Attachment Tab*. Attachments are listed alphabetically by *Description*, and can be sorted from the drop-down menu by *Description, File Name, Directory Path, Computer Name, Original File Source, Compressed Size, File Date/Time, or Modified Date/Time.*



To add a new attachment, click *Add*, and *Browse for Attachment* to identity the file path which includes the drive where the file is located, any directories or sub-directories, and the name of the file. Choose to compress the file by clicking in the compression box. Enter a brief description of the attachment, if desired. When retrieving a profile and viewing attachments, the attachments are listed alphabetically by *Description*. Although these file paths are created from one workstation, they are saved as part of your *ClientBase* database and so accessible from any *ClientBase* workstation.

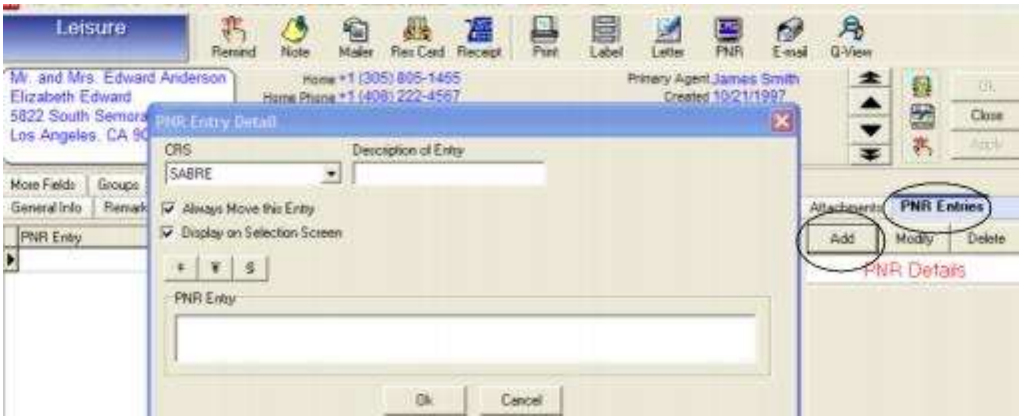
To view a saved attachment, highlight the attachment, and click *Open Attachment,* or double-click on attachment to open. *ClientBase* uses Windows association to view the file type, load the appropriate software, and retrieve the specified file. Every computer file has an extension (e.g., .doc, .jpg, .bmp, .html, etc.) must be associated with a specific Windows software program such as Word, Paint Shop Pro, Internet Explorer, etc. to be viewed. Although this association is created automatically by Windows when various software programs are installed, if a workstation does not have a software program associated with the type of file an attachment is pointing to, then the file cannot be viewed from the attachment created in *ClientBase*.

Modifications to a file launched from *ClientBase* attachments can be saved automatically back into *ClientBase*. If an attachment is opened and then modified and saved, upon closing the attachment you land on the attachment settings window. Clicking *OK* from this area saves the newly modified file back to *ClientBase*. Click *Delete*, while the name is highlighted, to remove an attachment. *Save As Attachment* allows you to save a copy of the attachment into another file location.

Note: If the size of the file is too large you will receive the message, *The compressed attachment you are trying to load is too large. Maximum size of the attachment after compression is 8454144 bytes.*

PNR Entries Tab

PNR entry tables are included at the Branch, Agent, Traveler/Contact and Profile levels. Store miscellaneous PNR entries to include when using the Merge to PNR feature for this client. Any PNR entries captured here at the profile level are included regardless of which traveler/contact is travelling.



CRS**:** Choose CRS (GDS) system from the drop-down menu.

Description of Entry**:** Enter a free-flow description.

Always Move this Entry: By checking this box, the entry always moves (is check off automatically) when you do a move to PNR. If this box is not checked, moving the entry is optional (and you'll need to check it off).

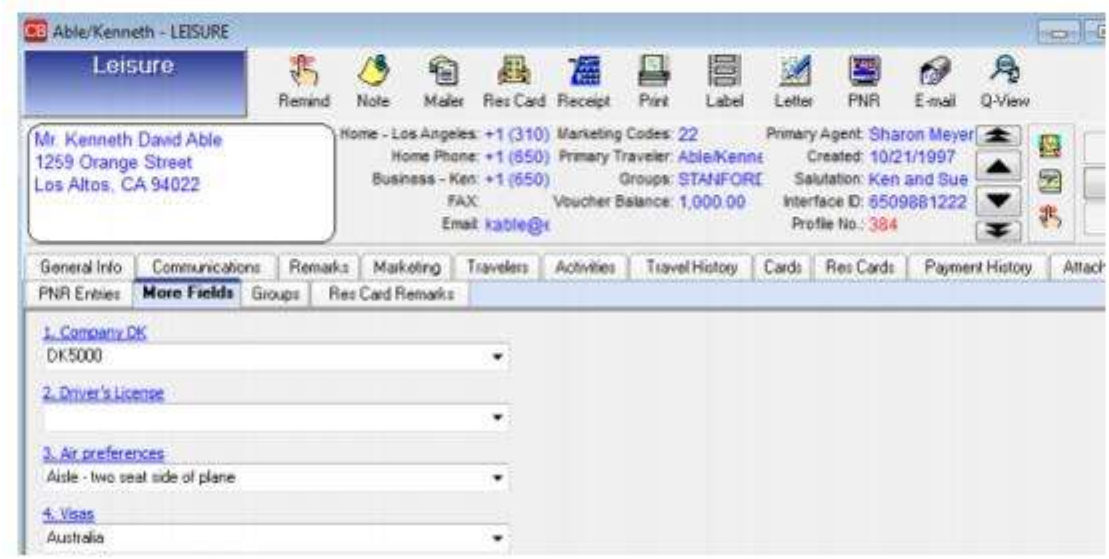
Display on Selection Screen**:** Within each PNR entry or PNR rule that is set as *Always Move This Rule*, an option is included called *Display on Selection Screen*. The PNR selection screen appears when you use the Merge to PNR feature, and allows you to select the specific profile data to be included 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.

PNR Entry**:** Enter the PNR entry exactly as you would in your reservation system, using text and special characters, and press OK.

For more information on moving data from *ClientBase* to your GDS PNR, please refer to chapter, *Putting Profiles to Work for You.*

More Fields Tab

If you want to track it, and *ClientBase* doesn't have a field for it, here is where you can create customized fields of information. Items like Social Security numbers, driver license numbers, client UDID's and other miscellaneous information, can be captured in these fields.



Setup the name of the field by going to **Global Defaults|Profile Defaults|More Field Categories** and adding a *Category Name*. To create a drop-down list of entry defaults, go to **Global Defaults|General Setup|User Defined Fields|More Fields** and click *Add*. Once setup, the field name assigned appears in the More Fields tab of all profiles, and entries can be made by free-flowing into the field or selecting from the drop-down list of default entries. Any fields setup in the More Fields tab are global, meaning the field name and drop-down default list appears in all profiles at all workstations. **Hint:**

More Fields categories and more field items are difficult to delete. It might be better to use a marketing code or a group name for temporary tagging, since these can be easily removed by using global modify.

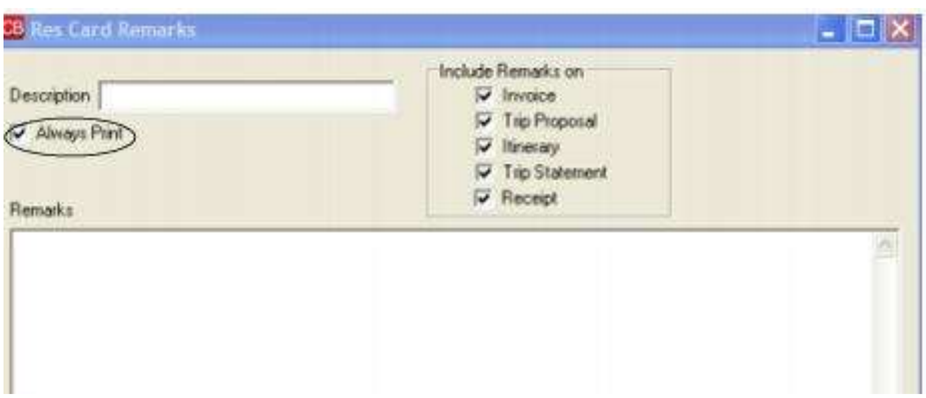
Groups Tab

Profiles may be associated with a specific group that has been created by the agency. There is no limit to how many groups one profile may be associated with. This group table is shared with *Trams Back Office*. Customize these items by going to **Global Defaults|General Setup|User Defined Fields|Groups: Client**, or by clicking the blue field label. To add a new group to the client's profile, click *Add;* to modify or enhance an group, click *Modify* while the group is highlighted; and click *Delete* while the group is highlighted to remove it.

Multiple groups can be associated with one profile. This group table is shared with *Trams Back Office.*

Res Card Remarks Tab

Whenever an invoice, itinerary, trip proposal, trip statement or receipt is issued for this client, enter profile level Res Card Remarks to print accordingly. These remarks are visible by clicking *Remarks.* If these remarks are setup with *Always Print,* they will automatically appear on the document. If this area is unchecked, the user gets to pick the remarks they want to use for a particular doc. Click *Add* and complete following fields:



Description: Enter a brief 15 character description of the Remark.

Always Print: Place a check here if you would like these remarks to print by default. Leave this field unchecked if you would like to force the user to select this remark to print at the time of printing the document.

Include Remarks On: Create different remarks for different documents. Select which document you would like to include this remark by placing a check within *Invoice, Trip Proposal, Itinerary, Trip Statement* or *Receipt*.

Remarks: Enter your free flow remarks here. There is no limit to the number of characters.

Add multiple remarks for each profile and arrange the desired ordered by highlighting a remark from the listing and clicking the blue arrows to move it up or down in position.

Click *OK* to Save.

Chapter 7: Using the Profile Manager to Manage Your Profiles

This chapter demonstrates how to use the Profile Manager feature in ClientBase.

Introduction

Located on the left of the main screen within the File Manager are five tabs. Each tab represents one of the five File Managers (Profiles, Activities and Res Cards, Inventory, and Internet). The Profile Manager is an area to Query and manage your agency's database of profiles. Stored folders and Query fields for the Profile Manager appear, as well as any Query results, displayed by profile.

The Profile Manager provides agents with quick access to vital information about clients, vendors (including service providers), agents and other profiles. From this area, not only can you go into the profile to access every detail of the record, you can also *locate, add, modify* or *delete* profile records. Use the results of a Query or a selected profile to merge profile data into a label, document template, PNR, e-mail or file. You can also print reports based on the results of a profile Query and gain valuable insight into the data contained with your database of profiles.

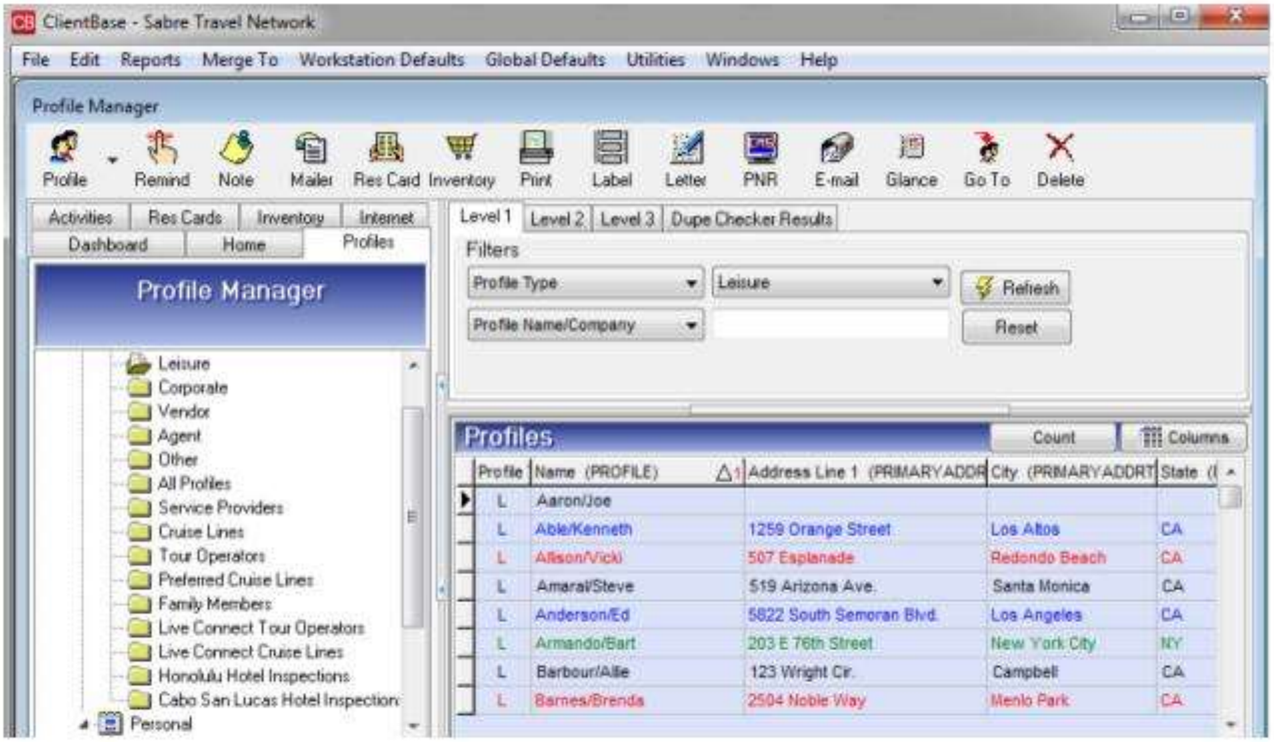
Changes to Queries in Version 3.08.xx and above

Starting in ClientBase version 3.08 and above queries have been enhanced to work with addresses at both the Traveler and the Profile level. Level 1 query by address includes both Profile and Traveler addresses. For Level 2 and Level 3 queries, Address queries on the General Info tab include both Profile and Traveler addresses, if none of the Address Type boxes are checked. Once any Type box is checked, only Profile addresses of that type are included. In order to query only for Traveler addresses, users must go to the Traveler/Contact tab.

Because Travelers can now be linked to multiple Profiles, queries by communication entry will display all profiles that the traveler is linked to. Also, because a profile and a passenger can have a primary communication, multiple primaries may exist for the same record.

The logic of queries on communication entries has been modified. Now, when a user queries by email address, phone number, etc., the query looks at both the Profile and Traveler communication entries and returns the result. If the Primary box is checked when querying, the Profile's Primary communication entries and the Primary Traveler's Primary communication entries are both searched. When querying by communication entries from the Traveler tab, only Traveler level communication entries are searched.

Querying Profiles



When first opening the Profile Manager, by default no Query filters are entered. Therefore, your entire database of all profile types appears in the Query results screen. To filter the database results, either click a folder containing a stored set of Query fields, or use Level 1, 2, or 3 Query fields to filter your database and enter a custom Query.

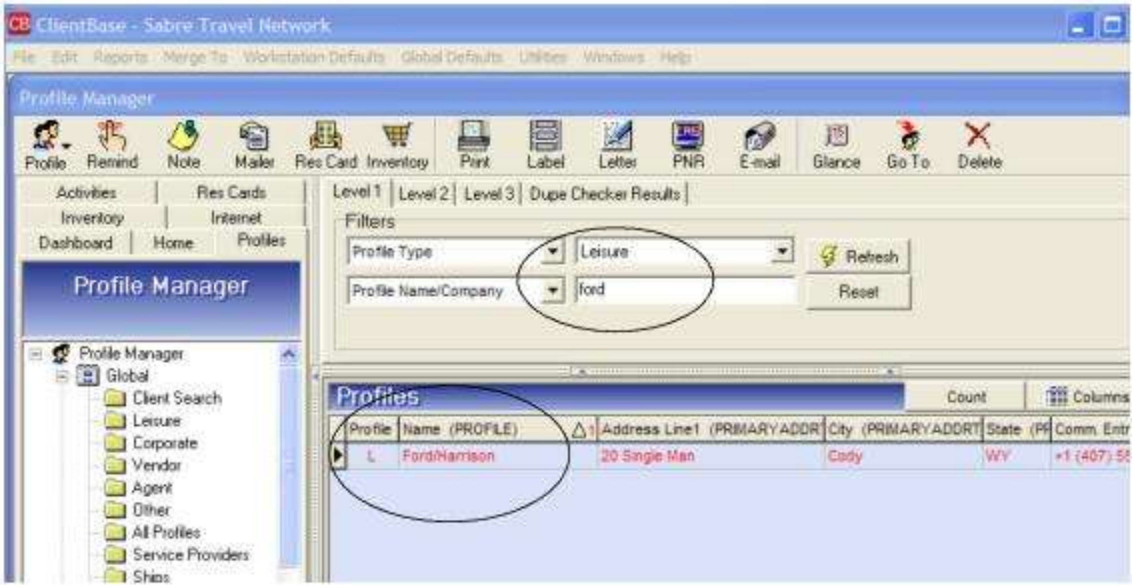
A list of Query folders is located to the left of the Profile Manager. The global folders are accessible to anyone for general viewing. Personal folders contain saved queries created by users and customized for their own particular user login. By clicking any of these folders, see the completed filters used for this stored Query, and a listing on the results screen of all profiles meeting the criteria of the selected Query filters. Query folders can be moved into any order you want by clicking the folder and dragging it to its new location.

Query Level 1 Filters

The Query Level 1 allows you to quickly locate a profile or a group of profiles by simply completing one or two Query filters. The drop-down menu fields identify what you want to *search by* and are completed by selecting from the following: *Profile Type, Profile Name, Company, Last Name, Family/Traveler Name, Phone, Fax, e-mail, Website, Family/Traveler Phone, Interface ID, City, State, Zip, Branch, Primary Agent, and Profile No.*

The blank fields are there for you to type in what you want to search for, and are completed by typing in free-flow information. To prevent spelling errors, it is suggested that you type no more than 3 or 4 characters in the free-flowing fields. If both fields are used in this Query, then the results match both criteria, not either/or. This means the Query filters are strung together with an “and” not an “or”. (Another way of saying this is that **All** fields are evaluated to form the results of the Query, instead of **Any** filter selected within one field being evaluated to form the result of the Query.) After completing or changing data in the filters, the system automatically sifts through the database and displays the matching profiles in the Query results screen.

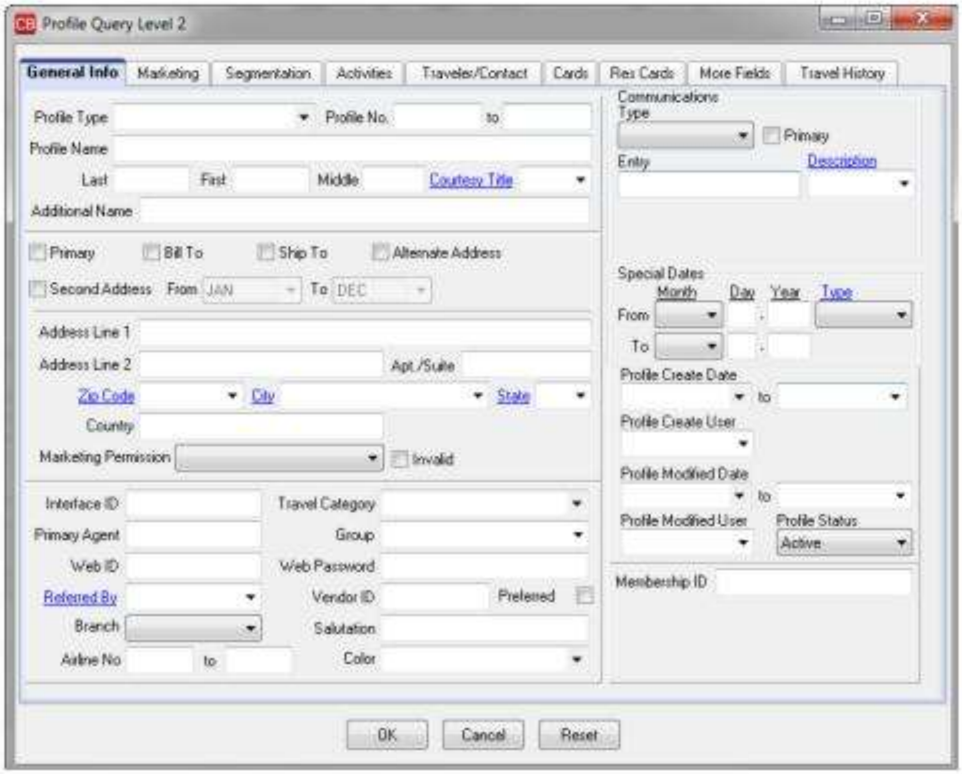
For example, if you are looking for an leisure client named Harry Ford, then set the first field to *Profile Type* and select *Leisure* from the drop-down. Then as you type in “F,” your clients starting with F appear, as you type in “Fo”, the system filters the database further and just displays those clients starting with Fo. If you type in the full last name of “Ford”, then only those leisure clients with the last name of Ford appears in the Query results:



Tip: You can easily filter by Branch or Primary Agent as part of a basic Level 1 Query by selecting those fields as selection criteria. Save a folder with these as filters by following directions below in the section entitled, *Saving Queries for Easy Access*.

Query Level 2 Filters

The Query Level 2 provides additional filters that allow you to more narrowly define a search. Search filters are selected by clicking *Filter* and then completing as many of the search criteria fields as desired. Since Level 2 Query “remembers” the last Query run, click *Reset* to clear. Always do this first when running a Level 2 Query, as there may be data remaining in the many search folders from the last search. Profile folder tabs such as *General Info, Marketing, Activities, Travelers/Contact, Cards, ResCards, More Fields and Travel History* are available for selection criteria entry. Query across all tabs of information. Like Level 1 Query, the selection criteria entered within a tab or across tabs are strung together with “ands”, so the resulting profiles must match **ALL** criteria.



By clicking *OK*, the Query is completed and a list of profiles matching the selection criteria appears on the results screen.

Example: You want to send a “Welcome to Our Agency Letter”, to all the client profiles created this month. By using the Level 2 filters, under the general info tab, you fill in the *Profile Create Date* fields with the month parameters and click OK to run the Query. After reviewing, you are ready to merge the list into the welcome letter.

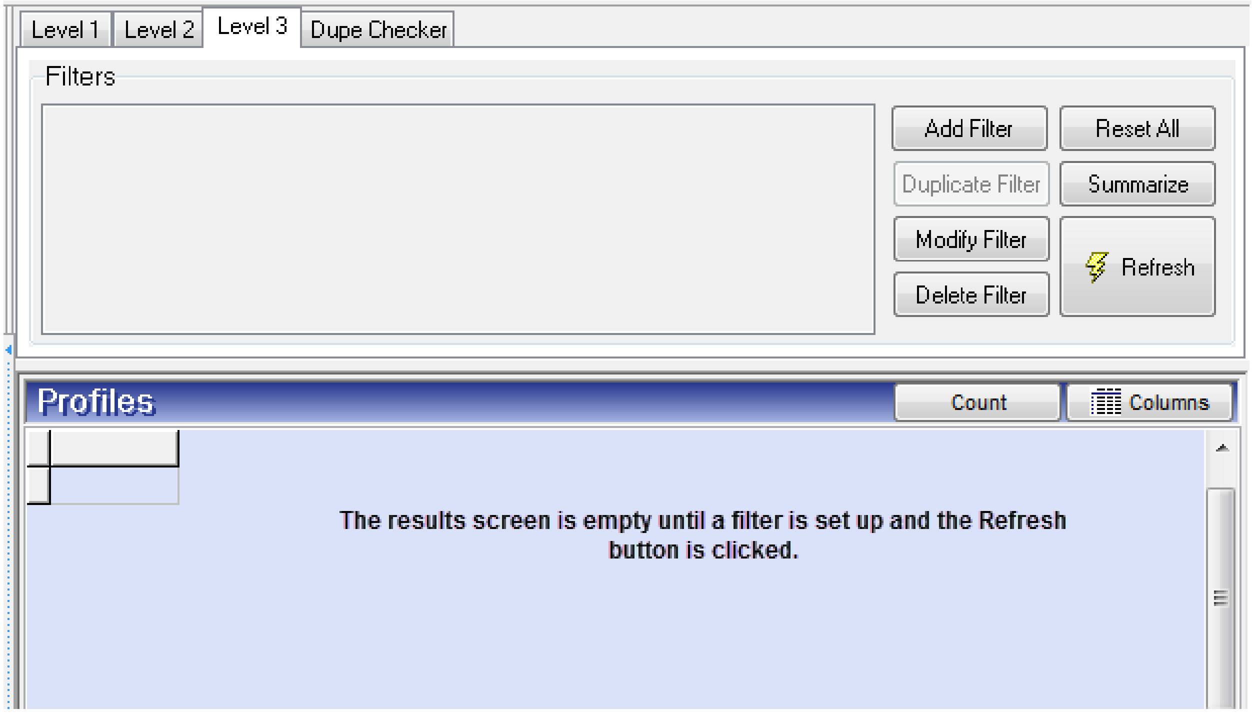
When using marketing tables/codes as selection criteria in a Level 2 Query, you can use multiple marketing tables and even multiple marketing codes within your search criteria. Any codes entered are “anded” together across the tables, but “or’d” together within a table. For example, if you place a check in the Cruise code within the *What Type* table and a check in the Deluxe code within the *What Budget* table, you only get clients that are coded for **both** codes, in other words, Deluxe Cruisers. If you place a check in the Cruise code and a check in the Tour code within the same *What Type* table, you get clients that are coded with **either** Cruise or Tour.

Querying for Inactive Profiles

Use Level 2 Query to find *Inactive Profiles.* Click *Filter* and from the drop-down *Profile Status* menu, choose *Inactive.* All inactive profiles now appear in the results screen for easy access.

Level 3 Query Filters

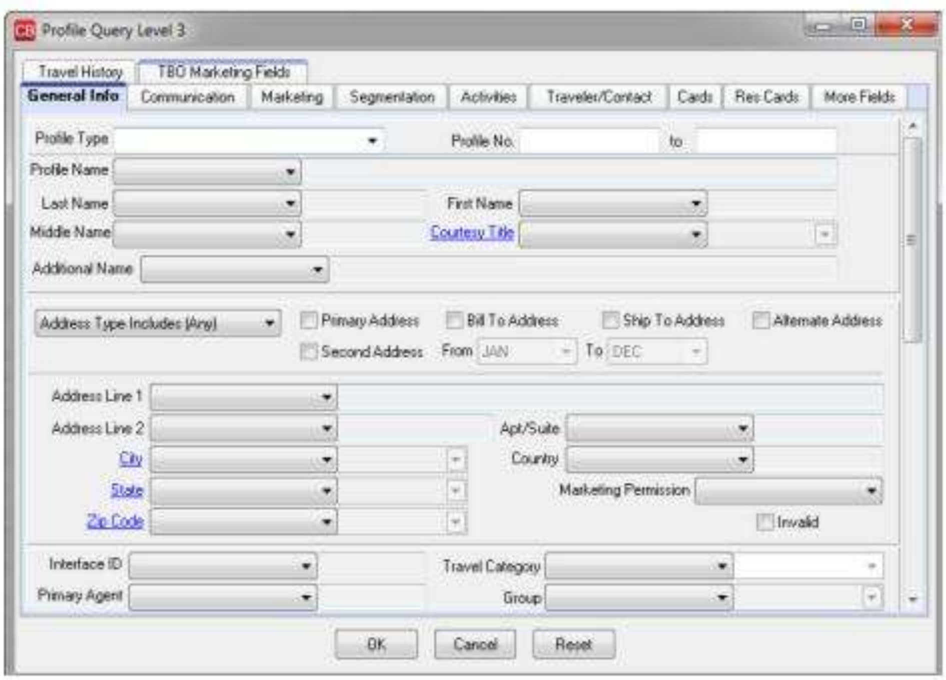
The Query Level 3 provides users with an even greater ability to more narrowly define a search. As detailed above, Level 2 Query allows a search by any number of fields, stringing one statement of criteria together with an “and.” Query Level 3 strings <u>multiple</u> statements of criteria together with an “or,” using *search method options* to define how the criteria should filter. The Level 3 Query has a totally different look from Level 2 Query:



There are a set of buttons including *Add Filter, Duplicate Filter, Modify Filter, Delete Filter, Reset All* (to clear out all filters currently displayed)**,** and *Summarize*. Notice there is nothing to view in the results screen. This is because you need to setup the criteria statement(s) and click *Refresh* to see the Level 3 Query results.

Note: It is not necessary to completely re-enter the criteria when adding similar filters. Once the first filter has been added to a Level 3 query, the *Duplicate Filter* button is enabled. When clicked, a Level 3 query screen is opened, pre-populated with all of the criteria from the selected filter. Users can also right-click on a filter and select *Duplicate Filter*.

To enter the search criteria into Level 3 Query, click *Add Filter*:



Profile folder tabs such as *General Info, Marketing, Activities, Travelers/Contact, Cards, ResCards, More Fields and Travel History* are available for selection criteria entry. What is unique about the Level 3 Query is that each available search field is divided into two parts. Directly to the left of the field, is a box with a drop-down menu of search method options, called *Operators* with which you can narrow down your search. Operators include: **Is Equal to; Less than or Equal to; Greater than or Equal to; Less than, Greater than, Not Equal to; Starts With; Contains; Is BLANK; and Is NOT BLANK**. After choosing the appropriate option, tab to the next field to enter criteria you are matching. Always include an operator with any field you use.

The Communication, Activities, Family/Contact, Cards, Res Cards and Travel History tabs are designed to make the queries more user-friendly and flexible. Since each of these tabs allow for multiple records within one profile, there's a filter called *Filter Type* which includes the following three options - *Blank Filter Type, Does Have Records with the following criteria,* and *Does Not Have Records with the following criteria.* By default a new Query has this *Filter Type* blank, which means the Query is not filtered in any way by that tab of information.

Blank Filter Type: By default a new Query has this Filter Type blank, meaning the Query is not filtered in any way by that tab of information.

Does Have Records with the following criteria: If this option is selected and no other search criteria is entered in that tab, then only profiles that have that type of record are included. For example, if you set the Travel History Filter Type to "Does Have Travel History Records with the following criteria" and no further criteria is entered, then this Query returns only profiles that have any kind of Travel History. If you enter further search criteria in this tab, then each criteria is strung together with an "and," and the system looks for at least 1 record that meets **ALL** the criteria (in the example of Travel History it looks for at least one invoice that meets all the criteria) and if at least 1 record is found, then the profile with that record is included within the results.

Does Not Have Records with the following criteria: If this option is selected and no search criteria is entered, then only profiles that do not have any of that type of record are included. For example, if you set the Travel History Filter Type to "Does Not Have Travel History Records with the following criteria" and no further criteria is entered, then this Query returns only profiles that have never purchased anything from your agency (those with no invoices). If you enter further search criteria in this tab, then think of this option as an "Exclude", which means it doesn't matter whether the profile has that type of record or not, exclude them if they do have that type of record that meets all of the additional search criteria.

Search Operators *Is Equal to Any* and *Is Not Equal to Any* to the below fields located within a Level 3 Query: When either operator is selected, rather than forcing you to select one filter from the drop-down list, you are able to select multiple filters from the drop-down list by placing a check in the desired choices. When multiple filters are selected within one field, each filter is strung together with an "or" (another way of saying this is **Any** filter selected within one field is evaluated to form the result of the Query). For example, if you set the *Search Operator* for *State* to *Is Equal to Any,* and check CA, AZ, and WA, and you set the *Profile Type* to *Leisure*, then the Query returns all profiles that are Leisure AND are in either CA, AZ **OR** WA. In addition to selecting from the drop-down list, you can also free flow your filter if the *Search Operator* is set to *Is Equal to Any* or *Is Not Equal to Any*. When free flowing filters, if you would like more than one filter included then type each filter in and separate each with a comma ",". For example, if you don't have states entered into the drop-down list, but would like to filter on CA, AZ OR WA, then set the *Search Operator* to *Is Equal to Any,* and type into the *State* field *CA,AZ,WA* (there are no spaces). *Is Equal to Any* or *Is Not Equal to Any* are found in:

General Info: Courtesy Title, Zip Code, City, State, Group, Referred By, Branch, Create User, Modified User.

Communication: Description.

Activities: Login Name, Reminder Type, Subject.

Family/Contact: Relationship with Profile, Courtesy Title, Citizenship, Passport, Issuing City, Passport Issuing Country.

Cards: Card Type, Card Code, Card Description.

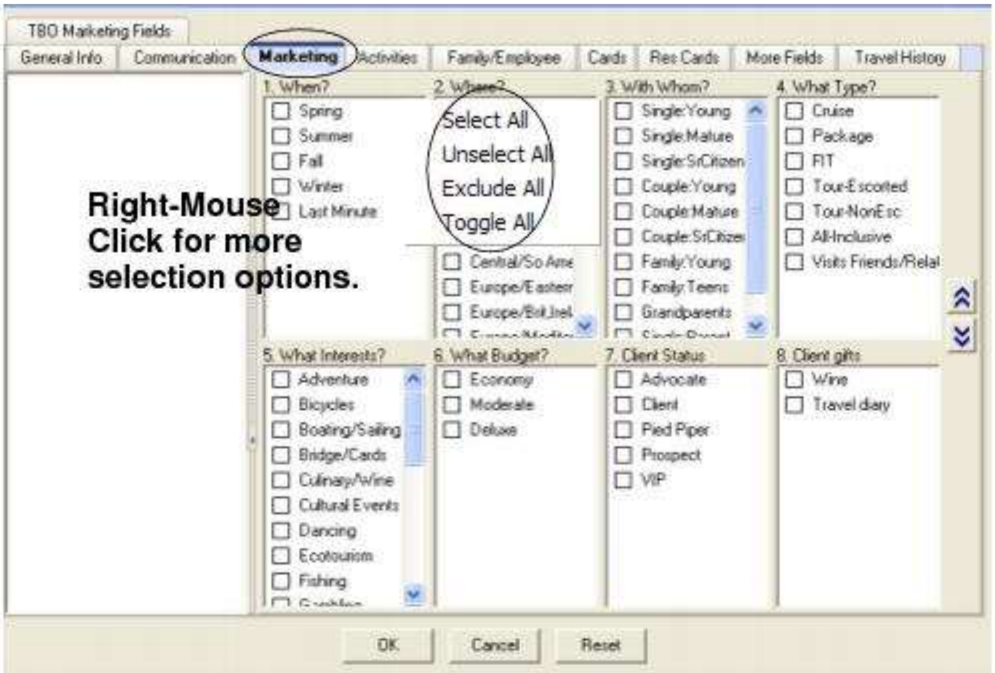
Res Cards: Reservation Cycle, Lead Source, Group, Region, Booking System, Booking Status, Air Code.

More Fields: All.

Hint for *Trams Back Office* Users: Some of the marketing information you have been capturing (sometime for years) in *Trams Back Office* does not appear in *ClientBase*. Notice the folder in the Level 3 Query Screen called *Trams Back Office Marketing Fields*. You can Query up profiles you have been collecting information on in *Trams Back Office* using the marketing fields: **Business Affil., Other, Notes, Add'l Notes, Stmt Remarks, and Travel Pref.** Once you have retrieved these profiles, go to the **Utilities|Global Modify** feature and globally modify these profiles by marking them with appropriate marketing codes. Now all this marketing information is present in *ClientBase* profile marketing tab.

Note on Sorting in Level 3 Query: Values entered into Alpha-numeric fields are always treated as STRINGS, so they do not sort in numeric order. If you want to use the fields to enter numeric values, then pre-determine the maximum digits that will be used, and start entering number with zeros in front..... for example, 00001, 00002, 00003, 00004, 00005, etc. Note that you can use less than/greater than when Querying for Alpha-numeric fields to filter for ranges of records. For example, you want to Query for values that begins with letter A thru R. Filter for Less than "S", or use Less Than or Equal to "R".

Marketing Code Selection



In the Marketing tab, click a box next to the marketing code and see the blue check mark letting you know that you have selected it, or click again to see the = with the red slash through it letting you know that you are excluding that code. Right-mouse click to *Select All, Unselect All, Exclude All* or *Toggle All.*

Using Date Formulas in Queries

Since queries can be saved and retrieved for frequent use, the date fields in all queries allow for date formulas. This means any field that has a date, can also contain a formula for that date. The date formula function allows you to create a Query without identifying a specific month, day and year in the *From* and *To* date fields. Instead, the Query is processed with a formula for the month, day, day of the week, and year based upon the date the report is processed. **Remember:** Make sure system date and time are correct. When a date formula is entered, the system converts it to your intended time period allowing you to run queries and/or save them for future use without the need to modify dates.

Example: The following tables contain sample formulas for specifying dates. Mix and match the absolute and relative parameters in the function. The first number specifies the day of the month, the second number specifies the month, and the third number specifies the year. So if you only have the first number filled in, this means you want this report to reoccur on this day every month, in every year.

DATE FORMULAS:

If You Want This	Enter This
1st day of this month:	=1,0,0
Last day of this month:	=31,0,0
1st day of this year:	=1,1,0
Last day of this year:	=31,12,0
Seven days from now:	=+7,0,0

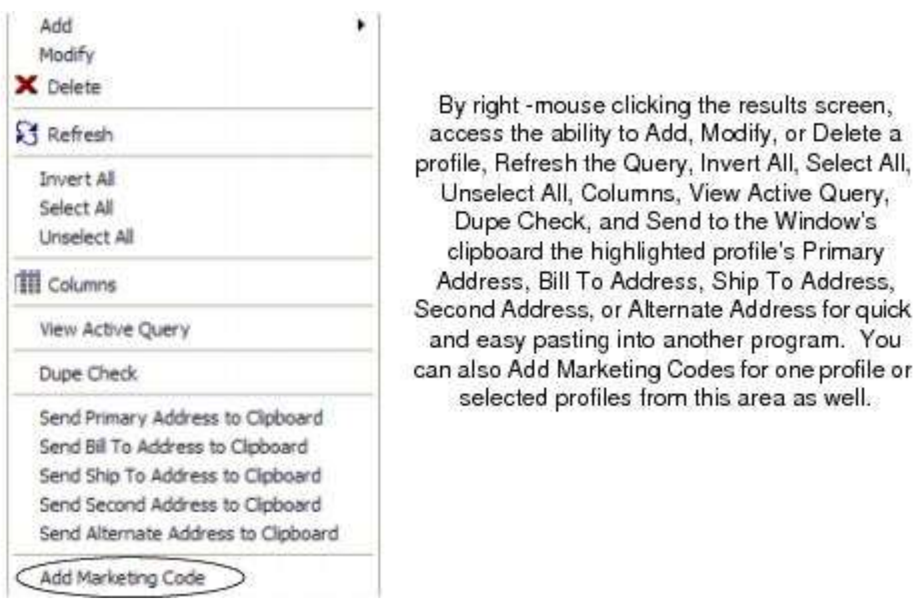
Last Monday (will show today if today is Monday)	=Mon
A week from last Monday	=Mon-1
Next Monday	=Mon+1
Three months from now	=0,+3,0
Six months ago:	=0,-6,0
One year from now	=0,0,+1

The Results Screen

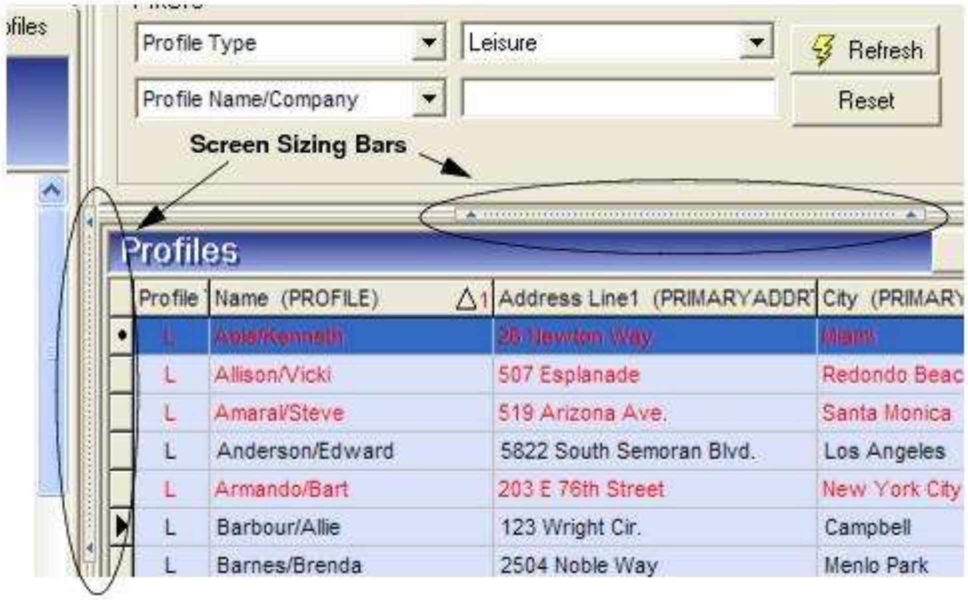
After you have completed a Query using Level 1, 2, or 3 filters, the results screen not only provides a count and list of Query results, but also easy access to a specific profile. To obtain a count of the Query results, click *Count* (located just above the results screen). To retrieve any profile, simply double-click the desired highlighted entry. This takes you into the profile folder to access any of the profile tabs discussed in greater detail in the “In-Depth” chapters of this manual. You can also highlight a profile in the results screen to merge with a specific toolbar function:

Some of the toolbar functions such as *Print, Label, Letter* and *e-mail* can be used for all results of the Query; or if you prefer, just selected results by holding down the <Ctrl> key and, with your mouse, selecting consecutive or non-consecutive entries. In this case, a dialog box appears asking you if you want to use the current results in the Profile Manager, use selected results in the Profile Manager, or if you want to reQuery the Profile Manager.

This function is discussed in much greater detail in the chapter entitled, **Putting Profiles to Work for You**.



The results screen can also be maximized for better viewing. There is a screen sizing bar located on top and on the left of the results screen.



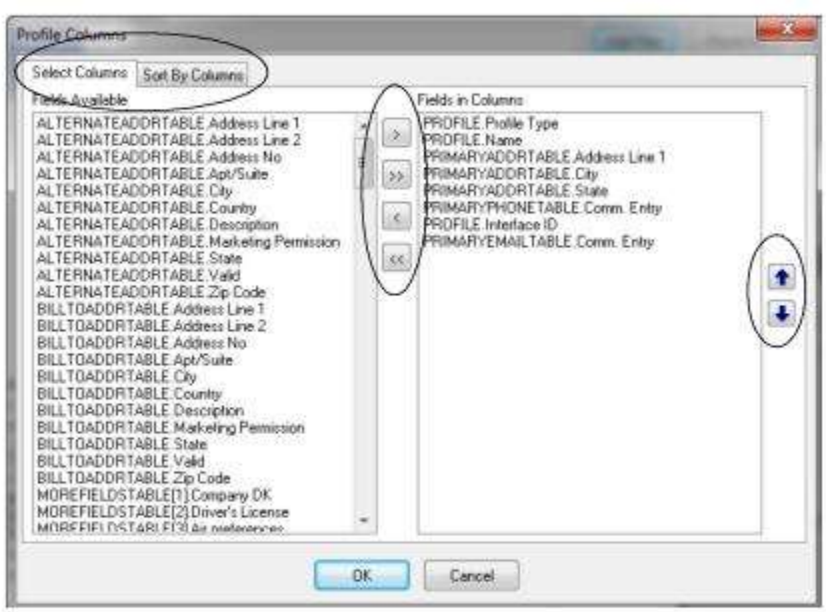
Saving Queries for Easy Access

As you can see, queries run in the Profile Manager can become quite complex. With all the available filters in Level 1, 2 and 3, you can view the database inside out, upside down or in just about any subset you desire. With this in mind, if there are certain queries that you want to run often, we suggest you save the Query filters after setting them up. This is called saving a Query to a folder. One click on a saved Query folder, and the Query filters are completed automatically. What a time saver!

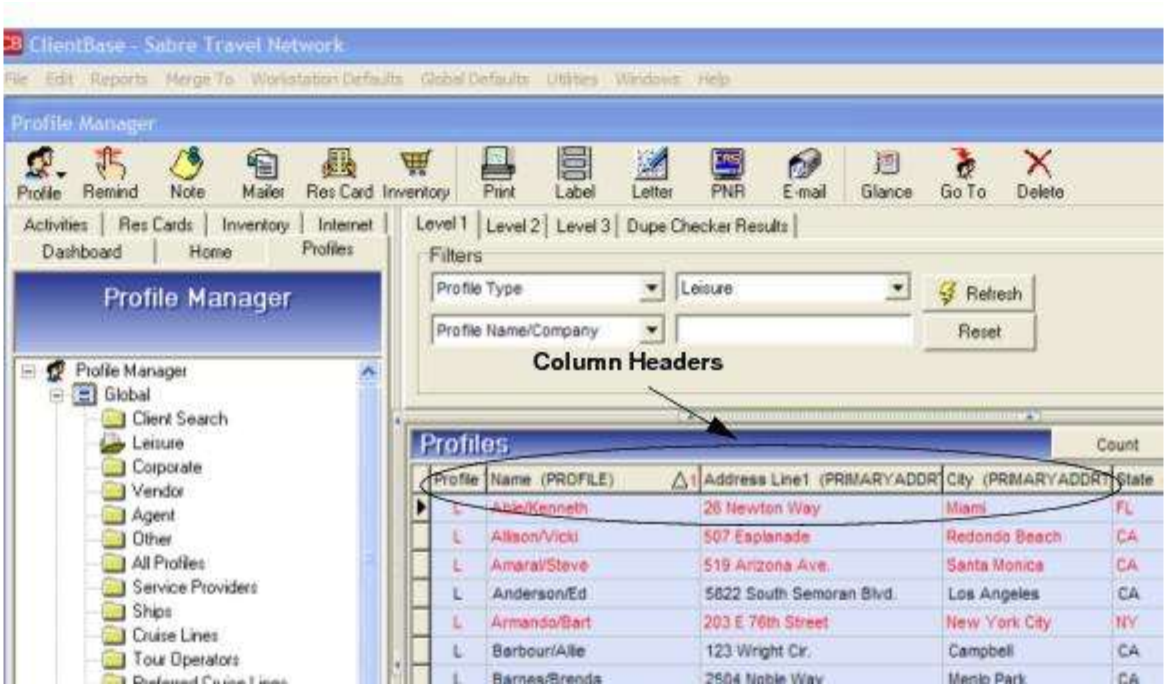
Here are steps for saving a Query in the Profile Manager:

1) Using Level 1, 2, or 3 filter parameters in the Profile Manager, enter Query filters and run your Query. (Use date formulas as described above if applicable.)

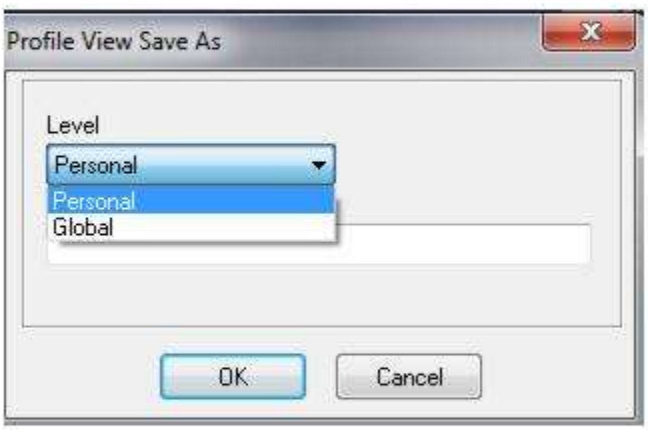
2) To customize the columns used in the Query, click *Columns* above the Profile Manager results screen.



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 and use the **>** or **<** arrows. By using the control key and your mouse, you can select non-consecutive entries to move. Use the up and down arrows to order the selections. To sort up to 3 columns in ascending or descending order, click *Sort by Columns.* You can also arrange, size, and sort the columns in the Query on the result screen by inserting the mouse between the column headers (see a bi-directional arrow), holding down the left-mouse button, and pulling the columns to the new size. Pull any column to a new location by using the mouse. To sort, hold down *Shift* and click a column header one time for ascending order, and once again for descending order.



3) When satisfied with the Query results, go to **File|Save Query As**. This screen appears:



4) From the drop-down Level menu, choose whether you want the Query to be *Personal* (for your own use only), or *Global* (for the use of everyone in the agency).

5) Name the Query.

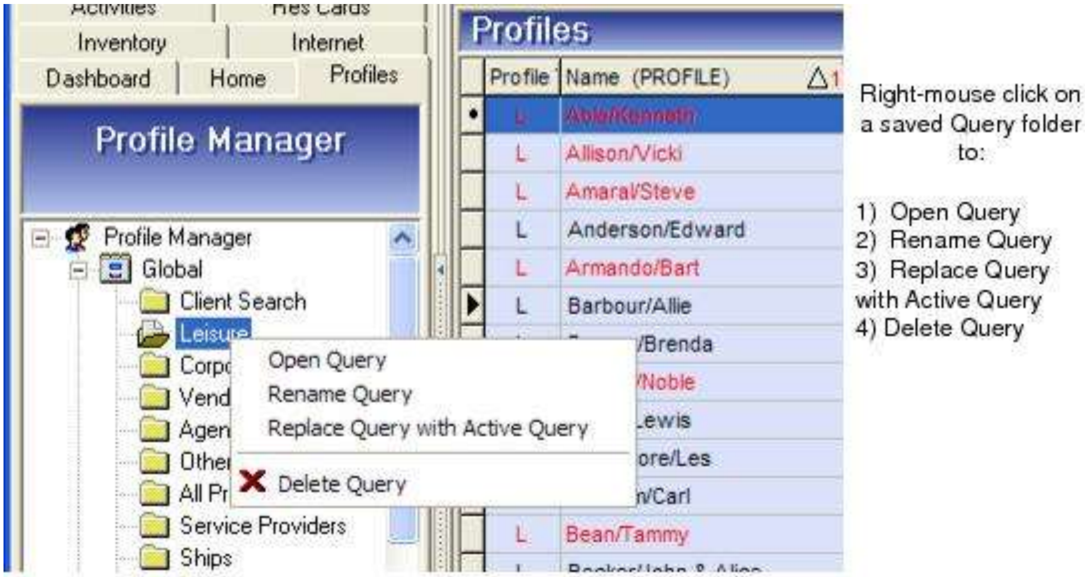
Quick Tip: Starting in *ClientBase* version 3.01, there are a series of suggested Saved Queries under the Personal folders for the SYSDBA login. If there is one of these you want to use, double-click on the folder to open it, and save it as a Global folder. Logging in with your own user name, find the saved Query folder. Leave it as a Global folder for all to use, or save it as Personal folder, and delete it from the Global area.

6) Click *OK*. The new query folder is located on the left hand side of the Profile Manager screen:

Note: *ClientBase* saves the filters and results layout, **not** the query results. The next time you use the saved query, any new data that has been added since it was created, is included in the new query.

Replace a Saved Query Folder with a New or Revised One

To replace an existing saved query folder with a new one, first perform the new query, adjusting the columns to your specifications, and then just right-mouse click the folder to replace.



Select *Replace Query with Active Query.* This menu also contains the ability to *Open Query, Rename Query, or Delete Query.* You can also change the location of a folder by pulling it wherever you want using your mouse.

Create New Profiles

When customers contact the agency, the first thing an agent does is check the Profile Manager to determine if that customer is in the database. Do this by querying in the Profile Manager as detailed above. Avoid creating duplicate profiles! If a client is not in the agency's *ClientBase* database, the agent needs to create a new customer profile. This can be done in 3 ways and for each option, you will be launched into a Quick Entry Form.

The first way is to right-mouse click in the Profile Manager results screen.

After clicking *Add*, a submenu appears for you to select the type of profile to add: *Leisure, Corporate, Vendor, Agent,* or *Other*.

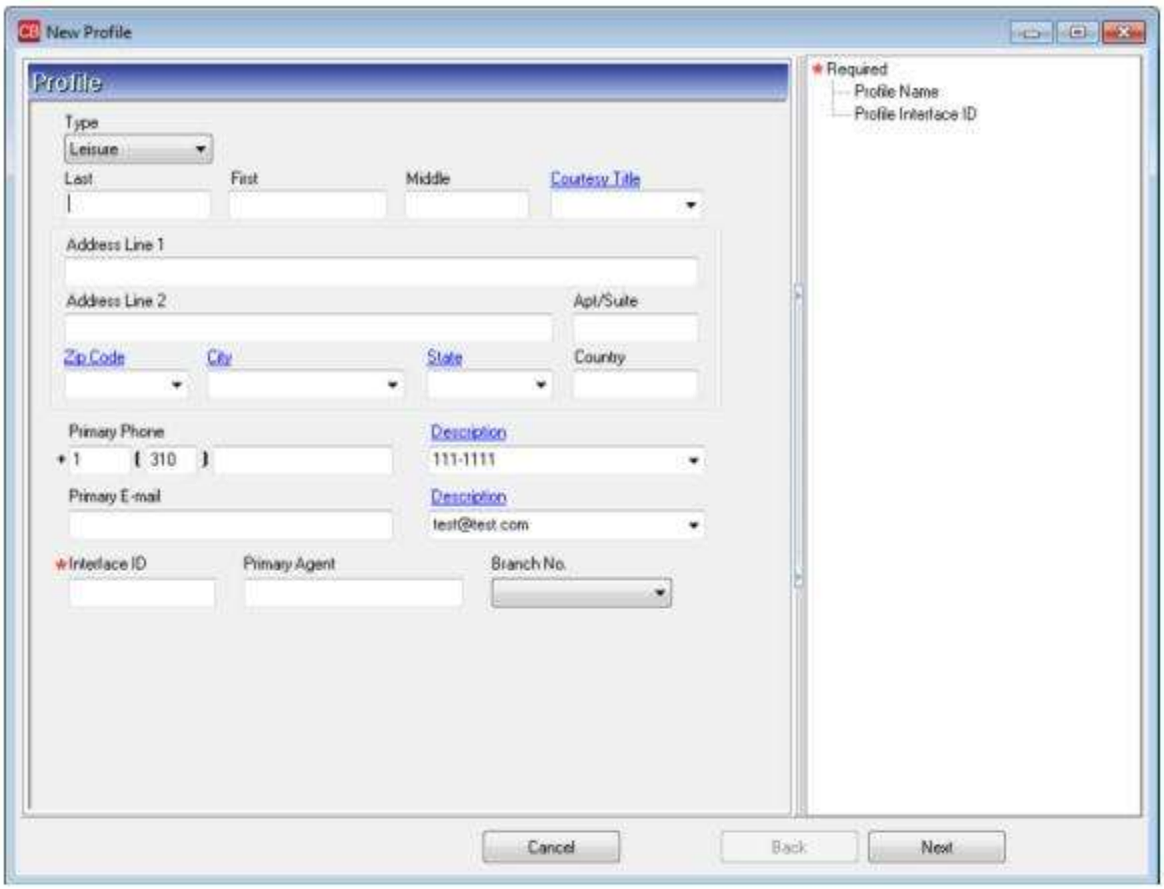
(**Note:** Any of these types can be changed by clicking on the drop-down *Type* in the Profile creation screen. This is also how to create a *Service Provider* profile.)

The second way to add a new profile is to click the *Profile* icon on the toolbar.

After clicking the Profile icon, a submenu appears to select the type of profile to add: *Leisure, Corporate, Vendor, Agent,* or *Other*.

The third way to create a new profile is to click **File|New** to select the type of profile - *Leisure, Corporate, Vendor, Agent,* or *Other.* To create a service provider profile, select any profile type and inside the new profile screen, select service provider from the drop-down list by *Profile Type.*

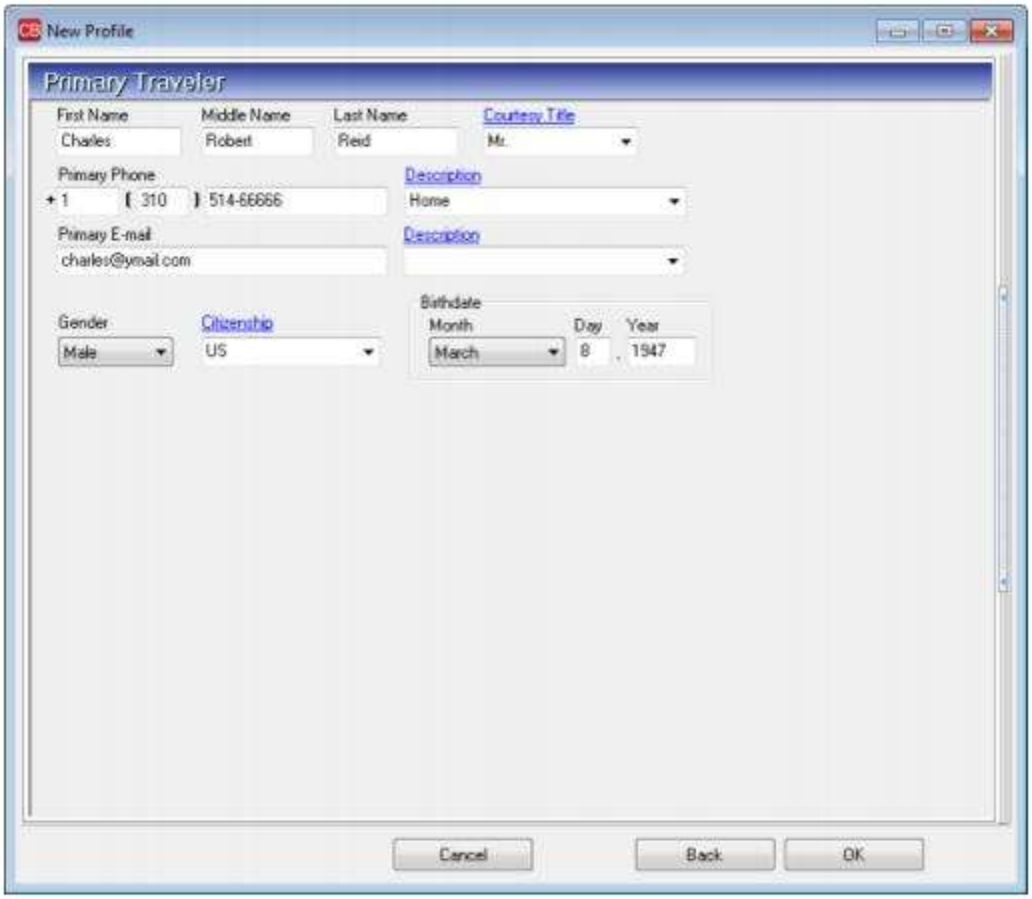
When entering a brand-new profile screen, notice that it is a Quick Entry Form:



From *Type,* selected the correct profile type from the drop-down. By using the tab key, enter data. Notice all *Required or Optional* fields are displayed on the right. As required or optional fields are entered, they will disappear from the display.

Note: Because so many agencies set Primary Phone to required and use it to automatically populate the Interface ID field, if Primary Phone and/or Primary Phone Description are set to required, those fields MUST be completed at the Profile level on the Quick Entry form before moving on to the Primary Traveler screen.

Click *Next* to continue.



The next entry area is for the Primary Traveler. Fill in any data that applies. Click **OK** to save data and enter the profile. (A search is performed behind the scenes based on the name fields and the phone and email fields. If a match is found, the user is prompted with a list of the matching Travelers and is given the opportunity to either link the existing Traveler to the new profile, or to cancel out and create a new Traveler. If a user does not have permission to access a certain profile type, they will be unable to create profiles of that type. If a user has no permission to view a profile tab which has required fields for a certain profile type, the user will not be able to create a profile of that type.)

Entering information for anyone who contacts the agency is essential, particularly the address and communication methods such as phone, cell phone, etc. At the very least, the agent should complete the communication information.

See chapter, **An In-Depth Look at a Client Profiles**, for how to enter other client profile details.

Change Profile Type

If you have entered a leisure profile incorrectly as a corporate one, or a corporate profile incorrectly as a leisure one, change the profile type so you don't have to re-enter it all over again. Simply query up the profile and change the *Profile Type* to the appropriate one. It's that easy.

Modifying Client Profiles

Each time a customer contacts the agency and there is an existing client profile in *ClientBase*, agents need to check pertinent client information - such as current address and phone numbers - for accuracy. Here is a suggested routine:

1) Locate the client's profile by doing a profile Query using Level 1, 2 or 3 Query filters as described in the *Querying Your Profiles* section above.

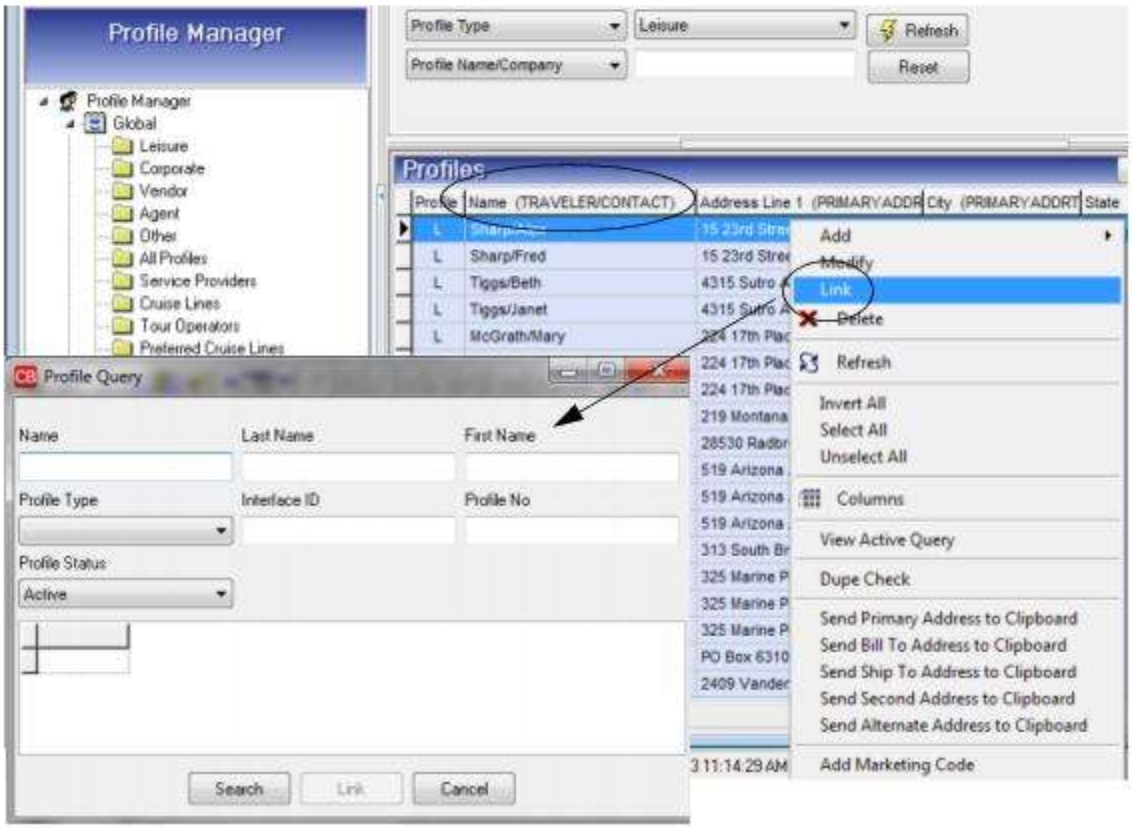
2) Enter the client's profile, by either double-clicking the highlighted entry in the results screen; or highlighting the desired entry and clicking the *Go To* icon on the toolbar.

3) Check phone and address information and make any changes. When any change is made to the profile, the screen turns turquoise.

4) At this point, click *OK* to save data and leave the profile; click *Apply* to stay in the profile; or click *Cancel* to abort.

Link a Traveler/Contact to Profile from Profile Manager Query

Link a Traveler/Contact to an existing profile from the results of a Profile Manager Query. If a Traveler/Contact field is displayed in columns, when a user right-clicks on a record, the option "Link" is displayed in the menu. When selected, a Profile Query box opens, and the user can search for the profile they want to link the Traveler to. When the results of the query are displayed, user can select a profile to link to, cancel out, or enter different search terms and query again.



Chapter 9: Putting Profiles to Work for You

This section demonstrates how to use the powerful ClientBase features, Merge to Doc, Merge to E-mail, Merge to File, Merge to Print, Merge to Label, and Merge to PNR.

Introduction

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 merging client profile data into PNR's, labels, document templates, e-mails, and files. Merge reminders, notes or mailers with multiple profiles for another great time saver. By using the stored data in the profiles instead of manually typing client information each time, you not only cut work time, but also reduce the chances of typing errors.

Merge to Labels

ClientBase puts the entire marketing process at your fingertips with the ability to easily print mailing labels from your database. Print a single label while working within a client profile, or print numerous labels from the results of any of the manager's Level 1, 2, or 3 queries. ClientBase queries provide you with a powerful marketing tool by giving you the ability to search your database using any one or any combination of client fields as search criteria. ClientBase makes mailings easy and efficient.

Important Note: Before you use the Merge to Label feature, please refer to chapter entitled, *Setting Up ClientBase for Your Agency* to learn how to setup labels and envelopes.

Using Merge to Label

The first step in using the Merge to Label feature in ClientBase is to use the Profile Manager to find the profile(s) included in the merge. When merging information into a label format, you have several choices. You can merge the information to labels from the results screen by:

1) Highlighting the desired profile and clicking the toolbar label icon, or on the menu item **Merge To|Labels**.

2) From within the profile, accessing the same toolbar Label icon.

3) Querying a group of profiles and clicking the Label toolbar icon or clicking **Merge to|Labels**.

4) From a group of profiles, selecting consecutive or non-consecutive profiles by holding down the <Ctrl> key. (See section, How to Multi-Select Records below.) Use also the edit menu or right-mouse click in results screen to Invert All, Select All, or Unselect All in the results screen. Then click the toolbar label icon or go to **Merge To|Label**. When you click the toolbar label icon, a label dialog box appears:

From here, Include Records from Current Results in Profile Manager, Selected Results in Profile Manager, or Re-Query Profile Manager. By default there is a check by Include Only Addresses with Marketing Permission Check. A label preview screen appears containing a menu bar:

Let's examine components of this menu bar:

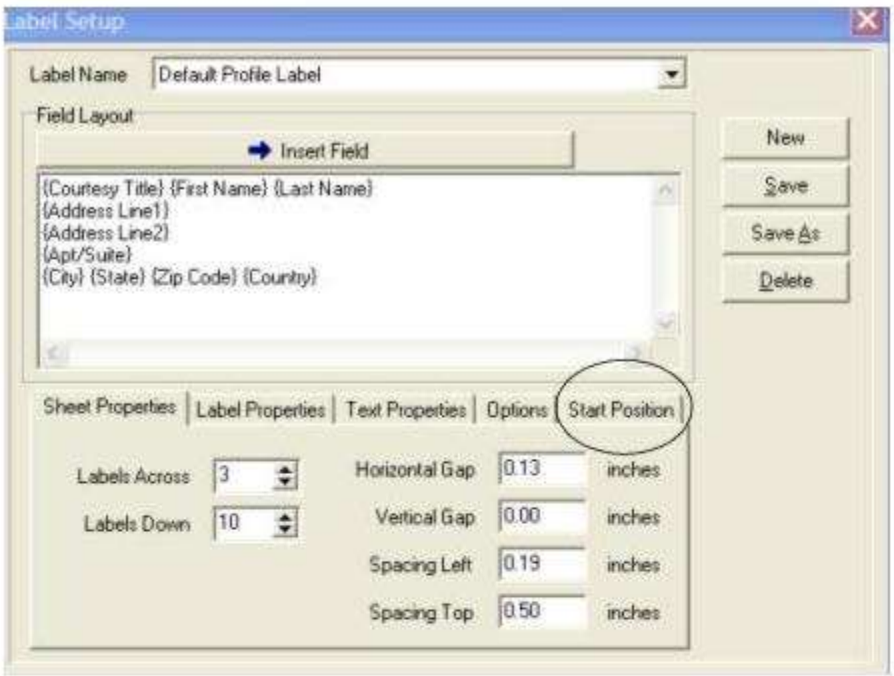
Zoom buttons: The first 4 icons are zoom functions to view your document in different magnifications.

Scroll Buttons: The next 4 icons are for navigation - go to top of a multi-page document (l<); go the bottom of a multi-page document (l>); go forward one page (>); or go back one page (<).

Page Setup: The next icon is the page setup dialog box enabling you to customize the page margins and orientation of the document.

Print/Save to Disk/E-mail: The printer icon provides access to a dialog box to specify printer preference, print range and number of copies. The disk icon allows you to save this to a location on your computer. You can also e-mail this label report by clicking on the E-mail icon.

Label Setup: The label icon with the green wrench is the label setup, so that you can reformat labels for this particular printing only. Want to reuse a label sheet? Click *Start Position* to signify where on the label sheet you want to start printing.



Create Mailers: Whether printing a single label from within a profile, or a large group of labels from the results of a Query, ClientBase makes it easy to track mailings sent to your client. Clicking this icon automatically creates a mailer record for every customer included in your results. Whether it's one result or 500 results, a unique mailer record is attached to each profile for historical purposes. Mailers are viewed from within the client profile in the activities tab, or can be queried and printed from the Activities Manager by date or subject.

Exit: Go through the door to exit the print preview screen.

Merge to Document Templates

Sending personalized letters frequently helps build stronger relationships with clients. That's one of the things that ClientBase does best. Document templates come with the program making it easy to print personalized letters for your customers. You can build a library of documents by adding your own customized templates for access by all agents. The speed and ease of this feature gives agents reason to be more pro-active in their communication with customers, thus building customer loyalty.

Important Note: Before you use the Merge to Document Templates feature, please refer to chapter entitled, *Setting Up ClientBase for Your Agency* to learn how to setup the default templates.

Using the Merge to Document Template Feature

The first step in using the Merge to Document Templates feature is to use the Profile Manager 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:

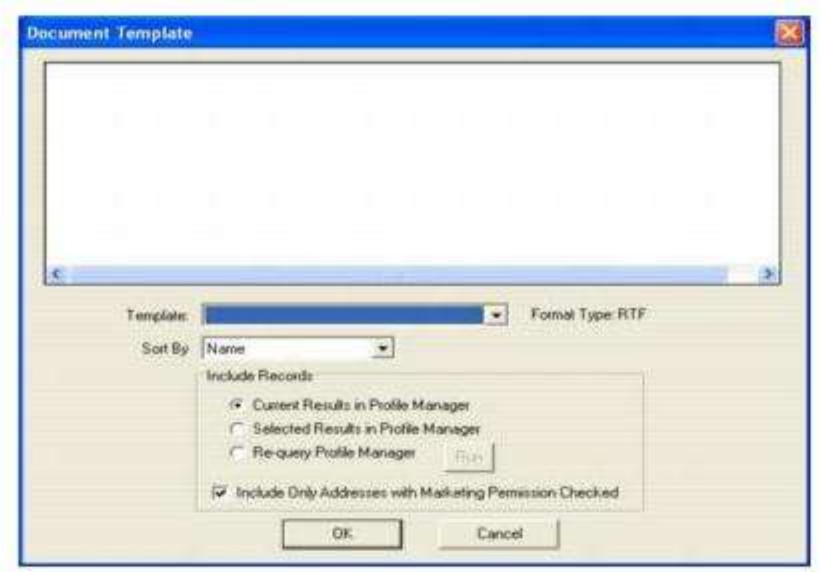
1) Highlighting the desired profile and clicking the toolbar letter icon or on the menu item Merge To|Document Templates.

2) From within the profile, accessing the same toolbar Letter icon.

3) Querying a group of profiles and clicking the Letter toolbar icon or **Merge To|Document Templates**.

4) From the group of profiles, selecting consecutive or non-consecutive profiles by holding down the <Ctrl> key. Use also the edit menu or right-mouse click in results screen to Invert All, Select All or Unselect All. (See section, How to Multi-Select Records below.) Click the toolbar Letter Icon or **Merge To|Document Templates**.

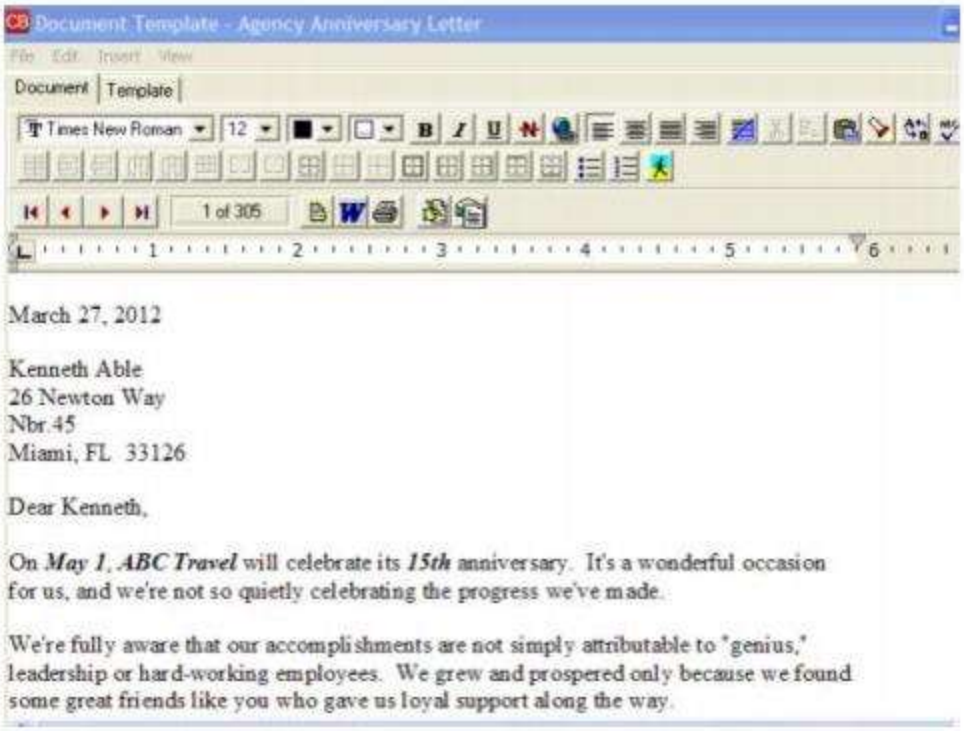
When you click the toolbar letter icon, a letter dialog box appears:



Browse for different templates and preview the document template you want to use, by using the drop-down menu. After selecting the document template, either I*nclude Records from Current Results in Profile Manager, Selected Results in Profile Manager,* or *Re-Query Profile Manager* and click *OK*. By default Include Only Addresses with Marketing Permission Checked is selected.

Based on the selected template, a set of letters is merged with information from each client's profile on the list. A toolbar enables you to edit documents within the Query. A document Indicator tells you what document number you are in, and how many documents have been generated.

Click the right and left arrows to navigate through the documents. To preview the documents you are sending out, click the Preview icon.



To make changes to just one of the documents, arrow to that document and make the desired changes from within the Document Tab. To make changes to all of the documents, click the Template Tab, make changes and then click Update. This updates all of the documents included in this particular Query, but does not permanently change the global template. Notice that other options on the template toolbar allow you to change the text color, alignment, style, size or even font. You can add content in the header or footer of the document. There is also Insert Field to place the contents of other profile fields into the letter. When you finish making all changes, click *Update Document.*

Preview Doc Icon: Click the preview icon to preview the document before printing.

Render to MS Word Icon: Click here to render the mailing into Microsoft Word for a spell check or some additional formatting. This feature requires minimum requirement of MS Word 2000 or Word XP installed on each workstation you are running ClientBase. ClientBase has its own spell check feature:

Spell Check: Several dictionaries have automatically been installed onto each workstation running ClientBase providing you with the ability to identify misspellings within Document Templates. By default, while typing within any of these three areas, the spell check feature automatically underlines each misspelled word. Right-click on a misspelled word and you will be offered suggested spellings along with the ability to Ignore, Ignore All or Add to Dictionary. In addition a Spell Check button, labeled ABC has been added to the toolbar of the document templates allowing you to run the spell check routine across all data captured.

Customizing Spell Check Utility: Although the spell check utility is automatically activated within Document Templates, Merge to E-mail and Profile Remarks, you can customize your spell check settings by going to **Workstation Defaults|Spell Checker**.

Dictionaries: Several different language dictionaries have automatically been installed, although by default only the General English dictionary as been enabled. From this area, Add, Enable, Disable or Remove dictionaries. Note: All dictionaries have been installed within the My Documents\TRAMS\Dictionary directory.

User Dictionaries: A blank user dictionary is also automatically installed where you can customize the dictionaries used when running spell check to include words not currently in the General Dictionaries. When running spell checker if a word not recognized is added to dictionary, the word is saved within this User Directory.

Options: By default the spell checker is set to Ignore ALL CAP words, Ignore Words with Numbers, and Highlight misspelled words. Remove the check from these settings to change the default.

Print Documents: If you want to alter printer settings, click *Print Setup* (the printer with the wrench). To print, click the Printer icon.

Save Edits: To save any edits you have made to this existing document, click *Save Edit*.

Create Mailers: Whether printing a single letter from within a profile, or a large group of letters from the results of a Query, ClientBase makes it easy to track mailings to your clients. This icon automatically creates a mailer record for every customer included in the Query results. Whether it's one result or 500 results, a unique mailer record is attached to each profile for historical purposes. The mailers can be viewed from within the client profile by clicking the activities tab, and can also be queried and printed from the Activities Manager by date or subject.

Merge to PNR

No more multiple entries or databases! ClientBase provides agents with the ability to move customer information (maintained in ClientBase profiles) to your reservation system's PNR. Sit back and watch the marketing database grow as agents become more efficient in collecting and using the database information to build PNR's. 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 ClientBase as the source for building PNR's. Also, watch customer loyalty grow as agents quickly access customer information instead of asking for the same information over and over again.

Any field captured in a client profile can be formatted for your GDS PNR. In addition to client profile fields, ClientBase includes four PNR entry tables-at the branch level, at the agent level, at the profile level and at the traveler level. This means you have complete flexibility on the amount of information you would like automatically formatted for a PNR while working in a ClientBase profile.

Important Notes: **Before you use the Merge to PNR feature, please refer to chapter entitled, *Setting Up ClientBase for Your Agency* to learn how to setup Merge to PNR, Merge to PNR Entries, and Merge to PNR Rules.

**To comply with TSA rules, when «Gender» is one of the fields being merged during Merge to PNR, if a passenger is under 24 months old), «Gender» is populated as MI (Male Infant) if the passenger is male or FI (Female Infant) if female.

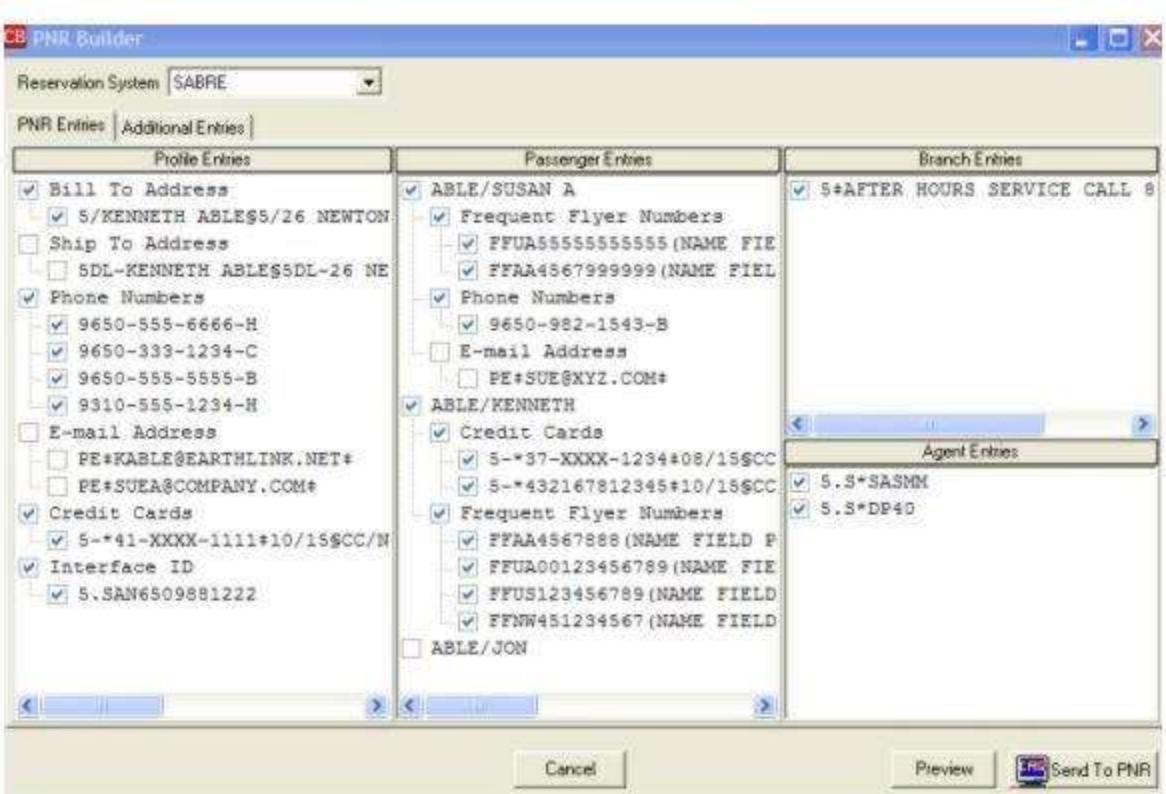
Using Merge to PNR

The first step in using the Merge to PNR feature is to locate the profile you want to merge with your CRS from any of your 3 main Managers, include Profile Manager, Activity Manager and Res Card Manager. When merging information into your CRS, you have several choices. Merge the information to PNR from the Query results screen by:

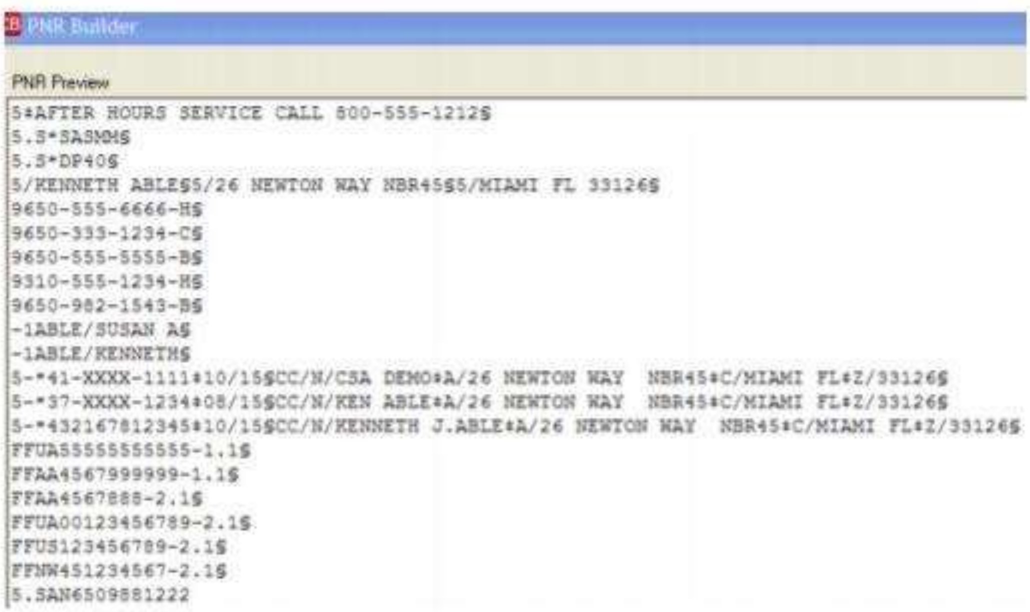
1) Highlighting the desired profile and clicking the toolbar CRS/PNR icon or clicking the menu item **Merge To|PNR**, or;

2) Double-clicking the desired profile to enter the profile folder. From within the profile, access the same toolbar CRS/PNR icon to start the move to PNR.

(The first time you do a Merge to PNR, change the Reservation System to yours. It'll save this next time you come in.) After you have clicked on the Merge to PNR icon in the toolbar, notice a series of check boxes in the PNR builder selection screen.



Select the information you want to move to a PNR by checking any optional entries. There are two entries tabs in this screen. The additional entries tab allows you to check off hidden profile, traveler, branch or agent entries. These additional entries are not displayed on the front screen but can automatically move to every PNR if you have created them with the Always Move this Entry option. By only displaying the entries on the PNR entry screen that you want to review, the process is simplified for ease of reviewing. In the Traveler Entries column, these should appear in alphabetical order for commercial clients and in the order they were created for leisure clients. If you want to change the order in the PNR, however, simply use your mouse to drag the traveler into the desired position in the column. Click Send to PNR. (By clicking Preview, you are taken into a PNR preview screen.)



The screen displays all information in the exact format that it will land into the current PNR. Information on this screen can be modified, but does not permanently update the ClientBase profile. Unless you are modifying the PNR entries for some reason, it is not necessary to enter this screen.)

Clicking Send to PNR does the following depending on your CRS:

Sabre Red, 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 CRS, hit Display All and view the updated PNR.

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.) Since +Scripts is unavailable with ProWeb, the Merge to PNR via API, but does work via clipboard (as well as PNR Import function via API) DOES NOT work with it.

Sabre Red Users: An API is the tool ClientBase uses to connect to the Sabre Host. In order for PNR Import (and Merge to PNR) to work, you must enable the MySabre Emualtor within Sabre Red. Select **Tools|Options|Sabre System|Advanced and check Sabre Emulator API:**

2. In ClientBase go to **Global Defaults|Merge to PNR Defaults|Merge to PNR Settings**. Set the Reservation System to Sabre and select *Use API* from the drop-down listing. (Other choice is *Use Clipboard*.) Please note that this setting can be overwritten on a workstation-by-workstation basis by going to **Workstation Defaults|Environment**, then clicking the Merge to PNR Settings tab from the desired workstation.

3. Use the Merge to PNR and PNR Import features as normal.

Worldspan: Leave Use Clipboard checked. 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 CRS, 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.

Nexion Users: Nexion offers an InternetView connection to the GDS's. Since it is Internet-based, Merge to PNR via clipboard is the only GDS related function of ClientBase that works with it.

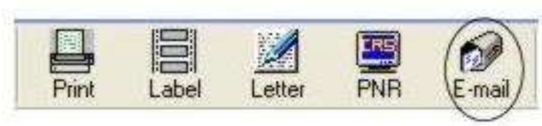
Additional Entries Link

Within each PNR Entry or PNR Rule that is set to Always Move, an option is included called "Display on Selection 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 Additional Entries.

FAQ: When I change my Global Defaults to Merge to PNR, why won't it stay?

A: When you select your GDS in the PNR builder screen, ClientBase "remembers" the GDS, after you complete ONE successful merge to PNR.

Merge to E-mail



There are two e-mail options available for using ClientBase's Merge to E-mail feature, *MAPI (Messaging Application Protocol Interface)* and *SMTP (Simple Mail Transfer Protocol)*. Complete instructions on how to setup, use, and track e-mails sent from ClientBase are found in the chapter entitled, *E-mail Marketing in ClientBase*.

Sending Text Messages from Any E-mail Program

You can input a person's cell phone number followed by the @ sign and a proper domain depending on the carrier (AT&T, Verizon, Sprint, etc.) as an e-mail address, and this indeed will send it as text message to them. To do this:

1. Enter it as an e-mail address entry.

2. Ask for the cell carrier.

3. Enter a description of SMS (or something like that) to help locate it.

Example: If my cell is 310-293-4444 and my carrier is AT&T, then e-mail me a text at 3102934444@txt.att.net.

Merge to File

Use the results of a profile Query to Merge to File. This enables you to create an ASCII delimited or text (.txt) file which can be e-mailed to a location of your choice or put on a disk. This is particularly useful for agencies who use mailing houses for bulk mail or need to send their computer lists to consortia for special mailings.

Using the Merge to File Feature

The first step in using the Merge to File feature is to use the Profile Manager to find the profile(s) you want to merge to the file.

1) The first step in using the Merge to File feature is to search in the Profile, Activity, or Res Card Manager to find the list of records to be included in the ASCII export.

2) Designate the fields to include within the file for each record in your results. The fields to include are based upon the current columns displayed within your Query results. To change the fields to include, use Select Columns to add or remove the fields within columns as desired.

3) Designate the sort order to include within the file for each record. This sorting within the ASCII export is determined by the current sorting of the current Query results. To change the sorting, use Sort by Columns to setup to three levels of sorting criteria.

4) Click **Merge|File** on the file menu items. A dialog box appears prompting you for the following information:

File Name: Click the three dots next to the File Name field and select to which folder or disk you want the file exported, and give it a file name. The file extension is .txt.

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.

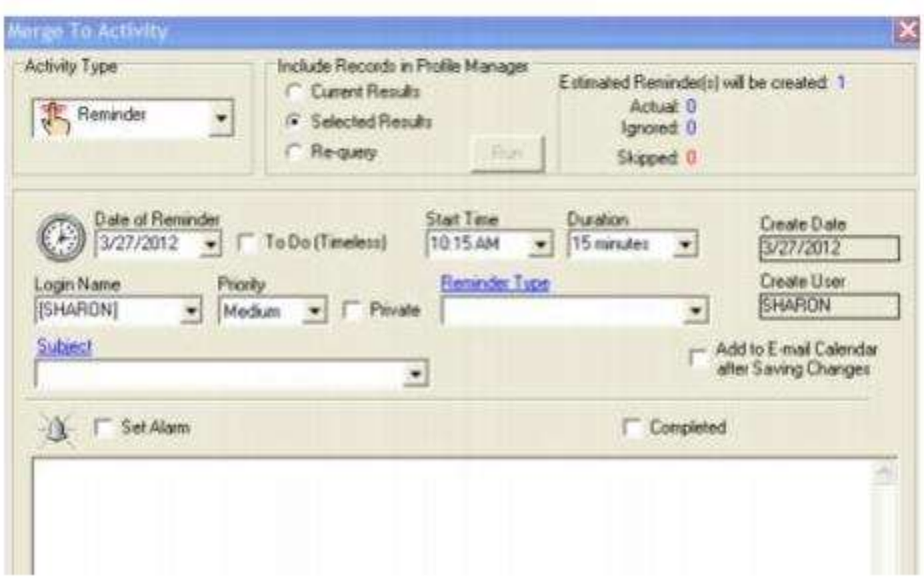
ASCII File Type: Select either *Comma delimited* or *Tab delimited*. This character separates each field included within each record in the file. Tab delimited is usually the default for most imports.

5) Click Export to begin the export process.

Note: In order to use this feature, permission must be granted by the database administrator.

Merge to Reminder|Note|Mailer

In ClientBase, create single or multiple reminders, notes or mailers at one time for your profiles. Query up all the profiles for which you want to add a reminder, note or mailer, and click the Reminder or Note or Mailer icon on the toolbar, or go to **Merge to|Reminder or Note or Mailer**.



Activity Type: From the drop-down menu, select *Note, Mailer,* or *Reminder*.

Include Records in Profile Manager: Select *Current Results* (all records in results screen); *Selected Results* (use this to send just one or the current record; previously selected records); or Re-Query to find the desired records.

Estimated Reminder(s) will be created: This area provides a summary of reminder(s), note(s), and mailer(s) to be created - *Actual, Ignored* and *Skipped*.

Date of Reminder: Defaults to today's date. Enter a different date by clicking the drop-down menu to access a calendar. Double-click desired date or just key in date.

Time of Reminder: Defaults to system time at reminder, note, or mailer entry or key in another time.

Login Name: Defaults to the user logged in at the time of creating the reminder, note, or mailer. Choose a different user by clicking the drop-down menu.

Private: Check this box to make the reminder or note private (not available for creating mailers). Only the sign-in agent and SYSDBA can access the reminder or note.

Reminder Type: If you want to vary the way customers are contacted so they are not always being called, or e-mailed, etc. and you require this of your agents, click here.

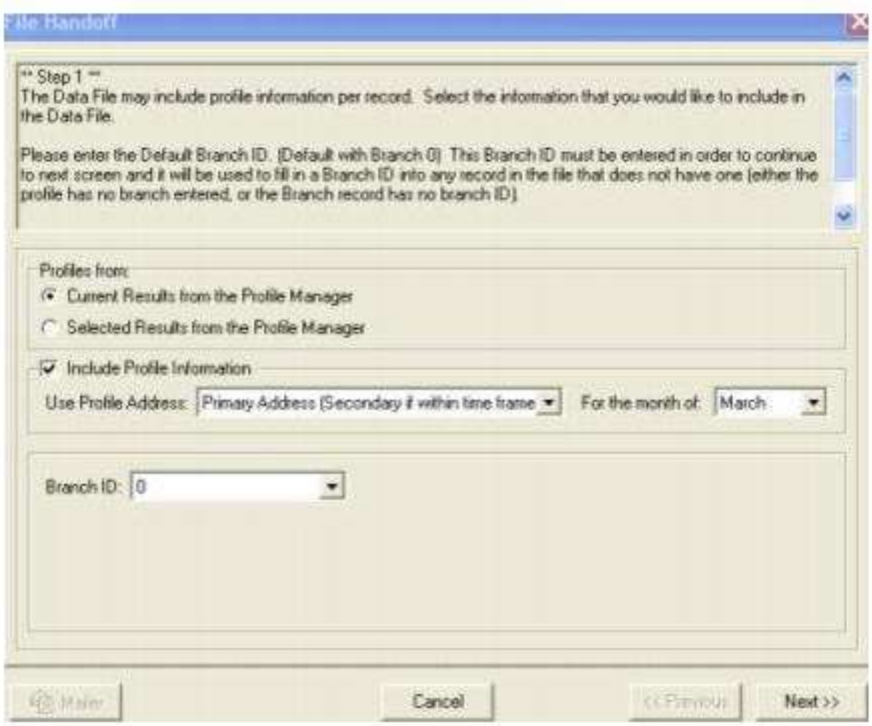
Subject: Enter the subject of the reminder, note, or mailer by selecting from the drop-down menu. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Reminder, Note, Mailer Subject** or by clicking on the blue labels in the ClientBase program, if you have permission to use these. By using consistent subjects across all reminders, notes, or mailers, this allows for valuable reporting.

Remarks: Enter any additional free-flow remarks or instructions in the text box at the bottom of the reminder, note, or mailer entry screen.

Merge to File Handoff

The File Handoff feature is a streamlined approach to creating and sending files to another entity, such as a mailing house or consortium for participation in a direct mail program. The Merge to File Handoff uses a wizard approach, walking you through setting up the ASCII file, keeping a history within the profiles included via a mailer record, and then sending the file via e-mail (or saving to disk).

Before using the Merge to File Handoff, use the Level 1, 2 or 3 Query to Query your database for just those profiles you would like included in the ASCII file (.txt) created by this feature. Select the columns and sorts you will be using. Use also the edit menu or right-mouse click in results screen to Invert All, Select All or Unselect All. Next, click Merge To|File Handoff. The wizard guides you through the following steps:



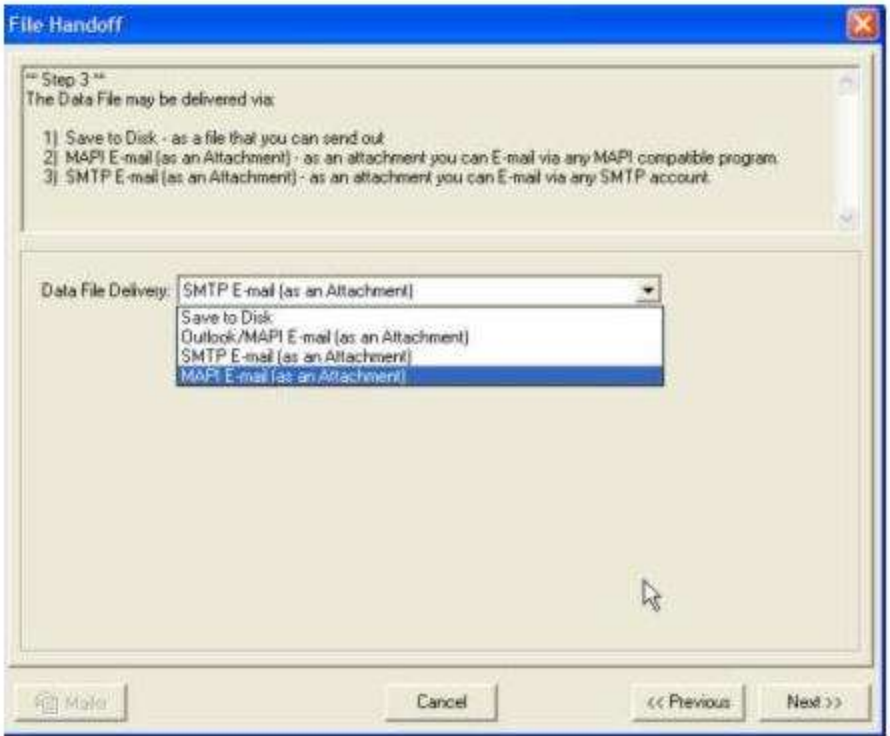
Step One: A window appears to identify what profiles to include, what address information to include, and what Branch ID to include for any profiles that do not have a Branch ID.

Please note, the Branch ID is mandatory to ensure that each profile from the database is associated with your agency or branch identification, in case the file is consolidated into a larger database of other agency profiles. The Branch ID can be entered here or by going into the Utilities Menu, selecting Branch, using Modify to enter the Branch record, and then completing the Branch ID field, located to the right of the Pseudo-City field.

Step Two: The file created by this process is hard-coded to include 7 Marketing Fields labeled with the field names of *When, Where, With Whom, What Type, What Interest, What Budget and Client Status.* (The default subdelimiter is ^.)

Map the marketing tables in the database to the appropriate marketing field in the file by clicking the down arrow next to each marketing field, and selecting from the drop-down list of marketing tables. If your agency does not maintain a marketing category for any of the 7 hard-coded marketing fields, then simply leave that field blank.

Step Three: Select the delivery method of *Save to Disk, Outlook/MAPI E-mail (as an Attachment); SMTP E-Mail (as an Attachment) or MAPI E-mail as an Attachment*. If either MAPI or SMTP e-mail is selected, then an e-mail message appears, and the ASCII file is automatically attached.



Step Four: Review a summary of the options selected so far in Steps 1 to 3. Use Previous to go back and make any changes. Use Mailer to create a mailer record for those profiles included in the file. Click *Finish* to create the file and complete the handoff process.

Step Five: If Save to Disk was selected as the delivery method, then the file is saved to the location specified and the process is complete. If e-mail was selected as the delivery method, then an e-mail message appears with the summary screen displayed in Step Four included in the body of the message and the ASCII file (.txt) attached to the e-mail. Simply enter the e-mail address and click Send Current.

How to Multi-Select Records

To multi-select records from the results of a Query, use the <CTRL> key in combination with a mouse click. Notice one of three symbols next to each profile as you push <CTRL> and click it:

a) **Bullet** - Profile has been selected.

b) **Bullet and Bracket** - Profile has been selected and is the current profile record your cursor is focused on.

c) **Solid Triangle** - Profile has NOT been selected as part of the multi-select, but is the current record your cursor is focused on. <CTRL> Click once to get the bullet and bracket, and a second time if you choose not to include in the multi-select after all. You can also use the main edit menu or right-mouse click in the results screen to Select All, Unselect All or Invert the results.

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 merging client profile data into PNR's, document templates, labels, and files. Print out the results of queries for telemarketing or reference. By using the stored data in the profiles instead of manually typing client information each time, you not only cut work time, but also reduce the chances of typing errors.

Also learn how to use the Case Converter feature to clean up names and addresses that may be in different cases. Need to globally change many profiles at one time? Learn how to use Global Modify.

Chapter 10: An In-Depth Look at Activities

This chapter demonstrates how the use of Reminders, Notes and Mailers creates user efficiency, increases productivity and enhances customer relationships.

Introduction

One of the most difficult challenges that today's travel agency faces is how to keep current clients loyal and develop long-term relationships with new customers. *ClientBase* is designed to help agencies achieve these goals by tracking all types of client contacts in a well-organized manner by creating an electronic history. In addition, users can easily setup follow up reminders, note customer comments and questions, and track all correspondence associated with a specific profile. This chapter shows you how easy this is.

Overview of Activities Types

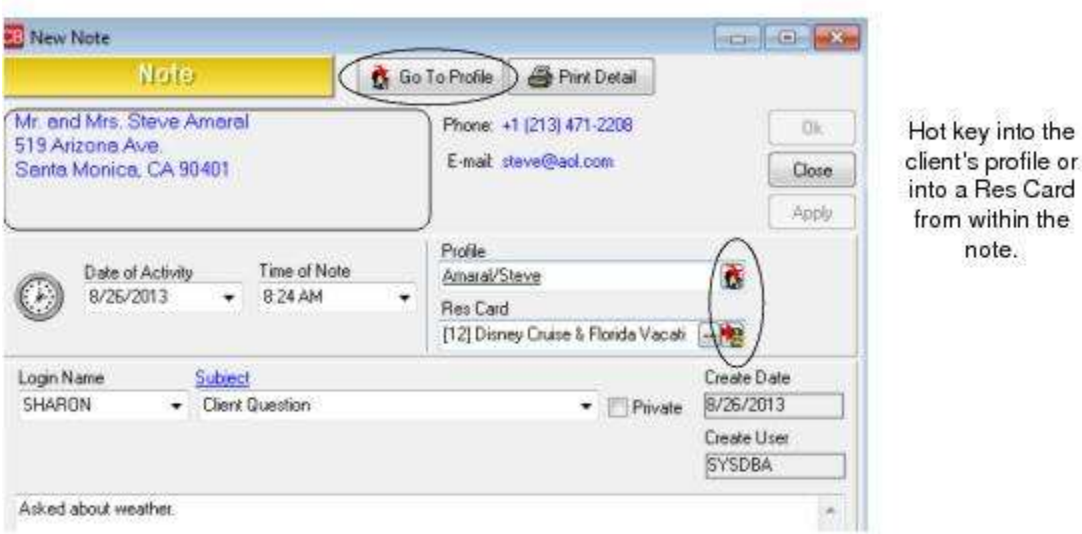
Notes

Each time a contact is made by the agency with your customer, valuable information is received. These contacts should be documented in the form of a *Note*. A *Note* in *ClientBase* is contained within a client profile and is similar to a "post-it note," complete with date of contact, user login and remarks.

CREATING A NOTE FROM WITHIN A CLIENT'S PROFILE

A Profile or Res Card can have any number of notes attached to it. This allows any agent interacting with the customer to view all past contacts. For example, Clara Adam's calls the agency saying she will be late with a final deposit. The agent, Sharon, creates a note in the trip's Res Card (notes in the Res Card can be also viewed in the Client Profile activity tab) documenting this development. Not only will Clara's note be "filed" in her profile, but it can be used, along with other notes, to run reports and keep anyone who enters the profile or Res Card informed that this deposit will be made late.

Notes Data Entry Screen in Client Profile



Go to Profile Button: Click to hot-key between the note and the client's profile.

Print Detail: Click to print out note details.

Name & Address Detail: At A Glance view the client's name and address.

Phone: Phone number of client is displayed for easy referral.

E-mail: E-mail of client is displayed for easy referral.

Date of Note: Defaults to today's date. Enter a different date by clicking the drop-down menu to access a calendar. Double-click desired date or just key in date.

Time of Note: Defaults to system time at note entry or key in another time.

Profile: Defaults to selected profile, but attach this note to a different profile by typing a portion of the client's name (Last/First) and clicking the drop-down arrow to get a listing of matching profiles to select from. Hot-key into the profile by clicking the red profile icon to the right of the field.

Reservation: Hot-key into the Res Card by clicking the red Res Card icon, or by clicking the three dots, Query for a Res Card for the trip for which this reminder applies. Available Query fields are *Trip Title, Trip Locator, or Destination by Region.* This reminder appears as part of the *Activities Tab* in the Res Card and Client Profile.

Login Name: Defaults to the user logged in at the time of note's creation. Choose a different user by clicking the drop-down menu.

Subject: Enter the subject of the note by selecting from the drop-down menu. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Note Subject**. By using consistent subjects across all users' notes, this allows for valuable reporting.

Private: Check this box if you want the note to be private. Only the sign-in agent and SYSDBA can access the note.

Create Date: Date note was created.

Remarks: Enter any additional free-flow remarks or instructions in the text box at the bottom of the note entry screen.

Click *Ok* to save and leave the Note; *Apply* to save changes and stay in the Note; and *Cancel* to abort the process.

Notes can be created from a variety of areas in ClientBase:

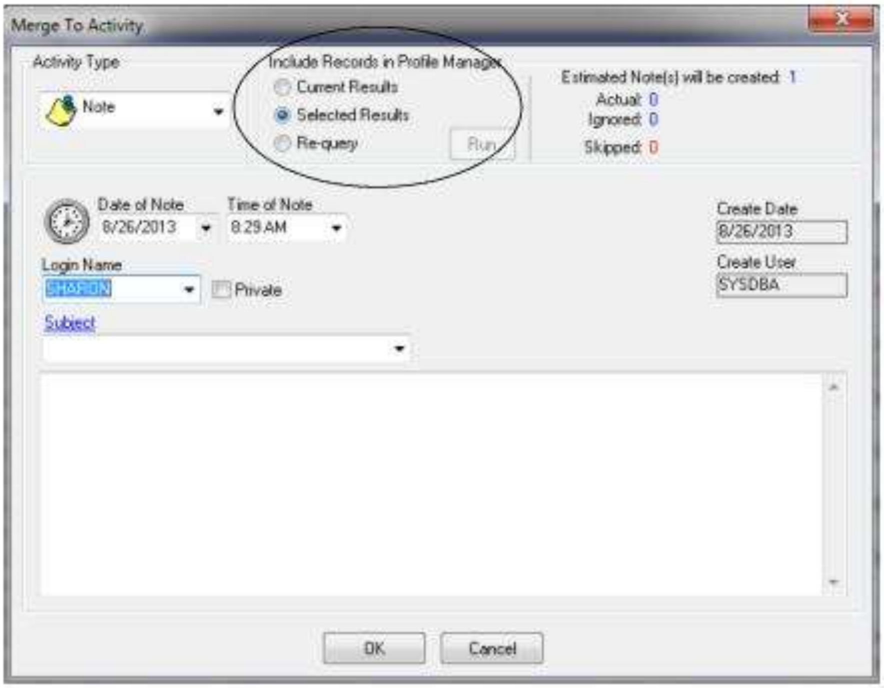
Create a note by highlighting the client profile from a Profile Manager Query in *ClientBase*'s main screen. Click *Note* on the toolbar. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.

- Within a client profile, create a note from any folder tab by clicking *Note* on the toolbar.
- In the client profile, under the Activity Tab, there are three buttons to the right of the results screen. Click *Add* to enter a new note; *Modify* to change or enhance a note; or *Delete* to remove a note.
- Create a new note by clicking **File|New|Note**. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.
- After clicking *New*, select *Note* from the submenu.
- Create a new note in a Res Card. Under the *Activities* tab, click *Add* to create a note. These notes can be viewed from inside the Res Card, or from the activity tab in the client's profile.

Creating Multiple Notes for Clients

In *ClientBase* create multiple notes at one time for your clients. Query up all the profiles for which to add a note and click *Note* on the toolbar, or go to **File|New|Note.**

DATA ENTRY SCREEN FOR CREATING MULTIPLE NOTES



Activity Type: From the drop-down menu, select Note, Mailer, or Reminder. *Note* is the default.

Include Records in Profile Manager: Select *Current Results* (all records in results screen); *Selected Results* (the current record or previously selected records); or *Re-Query* to find the desired records.

Estimated Note(s) will be created: This area provides a summary of note(s) to be created - Actual, Ignored and Skipped.

Date of Note: Defaults to today's date. Enter a different date by clicking the drop-down menu to access a calendar. Double-click desired date or just key in date.

Time of Note: Defaults to system time at note entry or key in another time.

Login Name: Defaults to the user logged in at the time of note creation. Choose a different user by clicking the drop-down menu.

Private: Check this box if you want the note to be private. Only the sign-in agent and SYSDBA can access the note.

Subject: Enter the subject of the note by selecting from the drop-down menu. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Note Subject**. Using consistent subjects across all users' notes allows for valuable reporting.

Remarks: Enter any additional free-flow remarks or instructions in the text box at the bottom of the note entry screen.

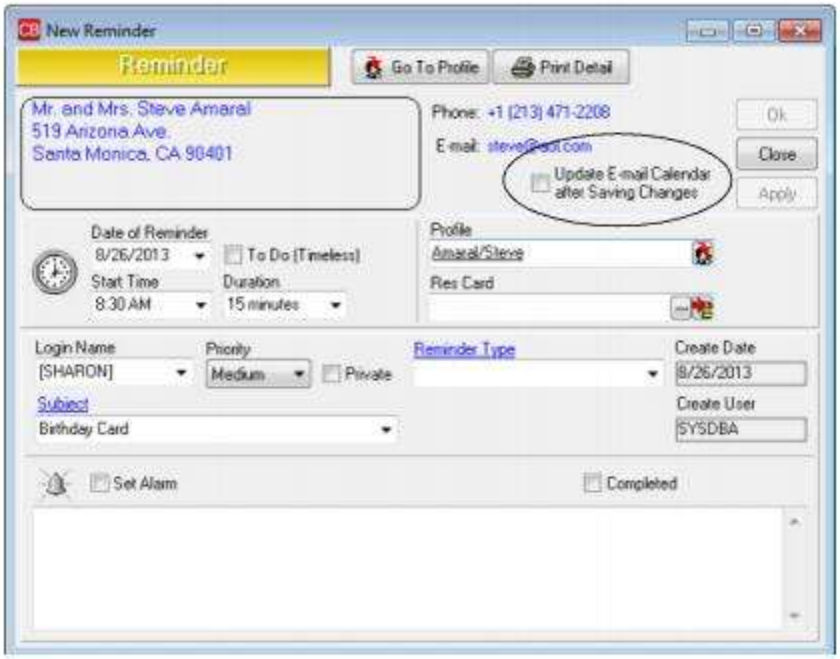
Reminders

Sharon, an agent, creates a *Reminder* to call Clara Adams next week to perform a trip inquiry follow-up. Joan, another agent, creates a *Reminder* to check on documents for Hank Adams. Mindy, yet another agent, creates a *Reminder* to welcome the Andersons home from their Hawaii honeymoon. Reminders allow you to schedule future tasks.

CREATING A REMINDER FROM WITHIN A CLIENT'S PROFILE

As with notes, reminders are created and attached to a Client Profile or Res Card. Any profile or Res Card can have any number of reminders attached to it. All reminders created appear on a daily To-Do list located in the Activity Manager.

Reminder Entry Screen in a Profile



Go to Profile Button: Click to easily toggle between the reminder and the profile.

Print Detail: Click to print out reminder details.

Name & Address Detail: At A Glance view the client's name and address.

Phone: Phone number of client is displayed for easy referral.

E-mail: E-mail of client is displayed for easy referral.

Update E-mail Calendar after Saving Changes: When checked updates are sent to user's e-mail address. This box is checked by default when the setting in User Settings (**Utilities|My Login)** is specified *All Reminders* or *Only for Reminders* when time is set."

Date of Reminder: Defaults to today's date. Enter a different date by clicking the drop-down menu to access a calendar and double-click desired date, or key in date.

To-Do (Timeless): Check here if you do not want to set a specific time for this reminder to appear on your Day-At A Glance or To-Do list. All timeless activities appear on a separate area in your calendar, but not under a specific time frame.

Profile: Defaults to selected profile, but attach this reminder to a different profile by typing a portion of the client's name (Last/First) and clicking the drop-down arrow to get a listing of matching profiles to select from. Hot-key into the client profile by clicking the red profile icon to the right of the field.

Reservation: Hot-key into the Res Card by clicking the red Res Card icon, or by clicking the three dots, Query for a Res Card for the trip for which this reminder applies. Available Query fields are *Trip Title, Trip Locator, or Destination by Region.* This reminder then appears as part of the *Activities Tab* in the Res Card and Profile.

Start Time: Enter time if you want alarm set; or if you want this reminder to appear on your Day-At A Glance on your calendar as an appointment under the time you specify.

Duration: Specify a block of time for this task to appear on your calendar.

Login Name: Defaults to the user currently logged into the system. Choose a different user by clicking the drop-down menu or keying in the date.

Priority: Click the drop-down menu to mark this reminder with a priority level - high, medium, or low. The priority level can be used as search criteria in both Level 2 Query of the Activity Manager and viewed in selected activity reports.

Private: Check this box to make reminder private. Only the sign-in agent and SYSDBA can access the reminder.

Reminder Type: Enter the type of follow-up for the reminder by clicking the drop-down menu and picking from a customized list. Such types may include phone call, e-mail, letter, etc. Reminder types are customized and setup in **Global Defaults|General Setup|User Defined Fields|Reminder Type.**

Create Date: Date reminder was created.

Subject: Enter the subject of the reminder by clicking the drop-down menu and picking from a customized list. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Reminder Subject.**

Set Alarm: To further assist with remembering important tasks, reminders include an optional alarm. This alarm, like the alarm which awakens you each morning, activates at the time designated within the reminder (regardless of where you are in the *ClientBase* program, or any other program) as long as *ClientBase* is running on your PC. When an alarm is activated, a window appears that includes the details of the reminder along with three options:

1) *Off:* Turns off the alarm but keeps the reminder open and on to-do list.

2) *Snooze:* Reschedules the alarm for a future time.

3) *View*: Allows you to work the reminder as you would from the Activity Manager.

Complete Date: This field is empty until the reminder is completed and a date is entered. Entering a *Complete Date* takes this reminder off the To-Do list.

Remarks: Enter any additional remarks or instructions in the text box at the bottom of the reminder entry screen.

Click *Ok* to save and leave the Reminder; *Apply* to save changes and stay in the Reminder; and *Cancel* to abort the process.

Reminders can be accessed from a variety of areas in ClientBase:

- Create a reminder by highlighting the client profile from a Profile Manager Query. Click *Remind* icon on the toolbar. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.
- Within a client profile, create a reminder from any folder by clicking *Remind* on the toolbar.
- In the client profile, under the activity tab, there are three buttons to the right of the results screen. Click *Add* to enter a new reminder; *Modify* to change or enhance a reminder; or *Delete* to remove a reminder.
- Click **File|New|Reminder**. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.
- To create reminders for a new trip (such as reminders for first deposit, final deposit, check for documents, etc.), click the activities tab in the Res Card, and then *Add*. These reminders can be viewed from inside the activity tab in the Res Card and in the client's profile.

REMINDER AND ALARM TIMES BASED ON LOCAL TIME

Reminder and alarm times are based on the local time and stored in the database in GMT (Greenwich Mean Time). This allows users that are in different time zones but using the same database to always see the Reminder Activities and Alarms in their own local time. For example, if a user in Los Angeles creates a Reminder for 11 am, a user in Dallas will see it as 1 pm.

(This conversion took place when updating the database to CBW version 3.06. Upon running the cbplusup.exe the system prompted, *Current and future Reminders, including pop-up Alarms, will be converted to GMT within the database. Please use the option below to select the time zone in which your current Activities were created - your area's correct time zone.* When accessing *ClientBase* after the update completed, your Windows regional settings are used to display Reminders in your local time zone. The cbplusup.exe defaults to the time zone the database server is currently set to, however, a drop-down of times zones is included to select from, along with a checkbox to designate if the location observes Daylight Savings. Only open Reminders (not completed) are converted in the database to GMT. Closed Reminders, Notes and Mailers are not converted.

After conversion, Reminder dates and times can be adjusted if needed through Global Modify. After Querying the Activities, select Global Modify and set Field to Modify as *ACTIVITY.Date of Reminder*. Two options are displayed:

Change Date to: Enter date or click the down arrow to select date from calendar

Adjust +/- Hours: Click the up or down arrow to increase or decrease by the number of hours Activity needs to be adjusted.

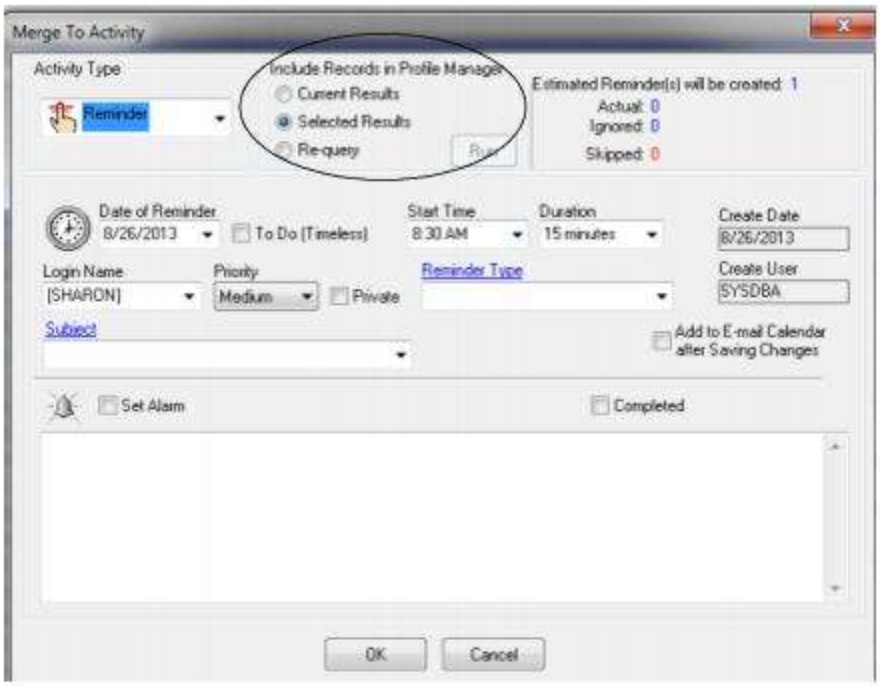
Note: During conversion Reminder dates and times are converted based on the time zone of the database server. If the server is in Los Angeles on Pacific Time, all dates and times will be converted to Pacific Time. Therefore, if a user in a branch office in Dallas entered a reminder for 10:00 a.m., that reminder will be converted to 10:00 a.m. Pacific Time. When the user in Dallas opens the reminder after the conversion, the user sees the reminder as 12:00 a.m. instead of

10:00 a.m. and will need to adjust it. Multiple Reminders can be adjusted at one time through Global Modify as explained above.

CREATING MULTIPLE REMINDERS FOR CLIENTS

In *ClientBase* create multiple reminders at one time for profiles. Query up all the profiles for which you want to add a reminder and click *Reminder* on the toolbar, or go to **File|New|Reminder.**

Data Entry Screen For Creating Multiple Reminders



Activity Type: From the drop-down menu, select Note, Mailer, or Reminder. *Reminder* is the default.

Include Records in Profile Manager: Select *Current Results* (all records in results screen); *Selected Results* (the current record or previously selected records); or *Re-Query* to find the desired records.

Estimated Reminder(s) will be created: This area provides a summary of reminder(s) to be created - Actual, Ignored and Skipped.

Date of Reminder: Defaults to today's date. Enter a different date by clicking the drop-down menu to access a calendar. Double-click desired date or just key in date.

Time of Reminder: Defaults to system time at reminder entry or key in another time.

Login Name: Defaults to the user logged in at the time of creating the reminder. Choose a different user by clicking the drop-down menu.

Private: Check this box to mark reminder private. Only the sign-in agent and SYSDBA can access the reminder.

Subject: Enter the subject of the reminder by selecting from the drop-down menu. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Reminder Subject**. Using consistent subjects across all users' reminders allows for valuable reporting.

Remarks: Enter any additional free-flow remarks or instructions in the text box at the bottom of the reminder entry screen.

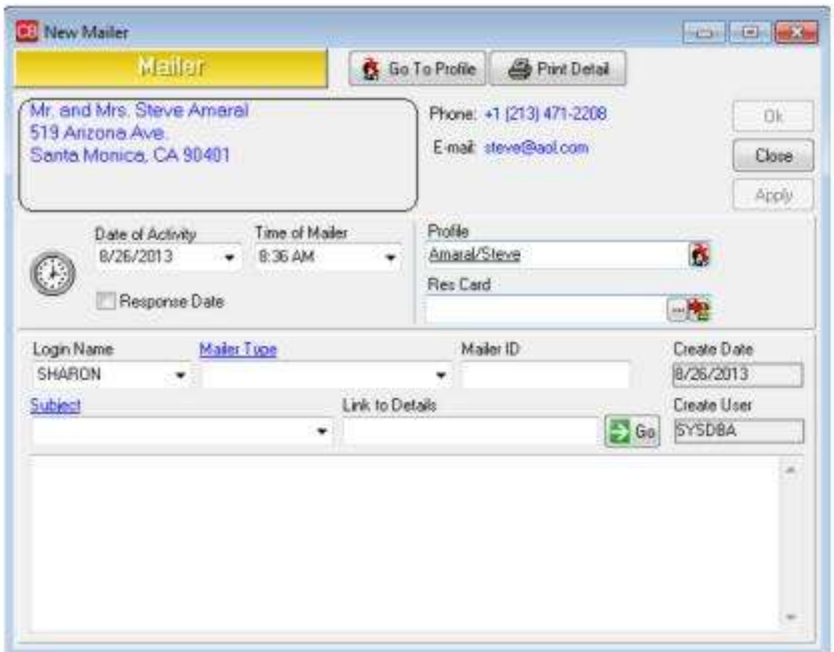
ADD A REMINDER FOR MORE THAN ONE USER LOGIN AT A TIME

You have the ability to create a reminder for more than one User Login at a time. This is perfect for staff meetings or reminders that you would like to create for multiple users. Select the profile you want to use to anchor the reminder (for a staff meeting, it could be your own agent profile), and click on the User Login drop-down list within a reminder and select as many users as desired. A separate Reminder will be created for each user.

Mailers

Agent Sharon wants to handle Clara Adams' trip inquiry to Alaska by mailing her a Princess brochure. Sharon decides to print out a label to put on the envelope, and print out a brochure cover letter from the document templates along with a label. When printing the label and the letter, the system when prompted automatically creates a *Mailer* which keeps a record of these mailings within the client's profile. Mailers provide tracking capability for every printed communication your agency sends to clients using document templates, labels or e-mail. As with notes and reminders, mailers are created and attached to a Client Profile or Res Card. Any profile or Res Card can have any number of mailers attached to it.

Mailer Entry Screen Within a Client Profile



Go to Profile Button: Click here to easily toggle between the mailer and the profile.

Print Detail: Click to print out mailer details.

Name & Address Detail: At A Glance view the client's name and address.

Phone: Phone number of client is displayed for easy referral.

E-mail: E-mail of client is displayed for easy referral.

Date|Time of Mailer: Defaults to today's date|time. Enter a different date by clicking the drop-down menu to access a calendar. Double-click desired date or key in date|time.

Profile: Defaults to selected profile, but attach this reminder to a different profile by typing a portion of the client's name (Last/First) and clicking the drop-down arrow to get a listing of matching profiles to select from. Hot-key into the profile by clicking the red profile icon to the right of the field.

Reservation: Hot-key into the Res Card by clicking the red Res Card icon, or by clicking the three dots, Query for a Res Card for the trip for which this mailer applies. Available Query fields are *Trip Title, Trip Locator, or Destination by Region.* This mailer then appears as part of the *Activities Tab* in the Res Card and Profile.

Response Date: Check if this is a response to the mailing. A checkmark accesses a date field to enter the date of the response. Now print a report showing you how successful your mailing was.

Login Name: Defaults to the user currently logged into the system. Choose a different user by clicking the drop-down menu.

Mailer Type: This field is 25 characters (alphanumeric) and allows for selecting from a user-defined drop-down list. Defaults are *Promotion (E-mail), Promotion (Print Mail), Trip Correspondence, and General Correspondence.*

Mailer ID: This field is 30 characters (alphanumeric) and is handy and indexed for maximum performance when used for Querying purposes.

Subject: Enter the subject of the mailer by clicking the drop-down menu and selecting from a customized list. Mailers are setup in **Global Defaults|General Setup|User Defined Fields|Mailer Subject**. You can also type a free-flowing subject line in this field, although consistent subjects selected for mailers make for some powerful reporting.

Link to Detail: This allows for capturing a URL as a method for providing more details on the mailing that was sent to this client. Upon creating mailers, this *Link to Details* can be populated so that as users view a particular Mailer, they can click the *Go* button next to this new field and the system automatically launches IE and navigates to that URL.

Remarks: Enter any additional remarks or instructions in the text box at the bottom of the mailer entry screen.

Create Date: Date Mailer was created.

MAILERS CAN BE CREATED FROM SEVERAL DIFFERENT AREAS IN CLIENTBASE:

- ***While printing labels:*** When you click the *Print* icon, you are prompted to create a mailer. Always click *Yes.* Or, from the label preview screen (whether for one label or multiple labels), click the *Create Mailer* icon to create mailers for all of the results before printing.
- ***While printing letters:*** When you click the *Print* icon, you are prompted to create a mailer. Always click *Yes.* Or, from the document template preview screen (whether for one letter or multiple letters), click the *Create Mailer* icon on toolbar to create mailer before printing.
- ***While sending e-mails:*** From the e-mail preview screen (whether for one e-mail or for multiple e-mails), click the *Create Mailer* icon in toolbar to create mailer before printing or sending. There is a prompt to do this.

Each mailer contains a notation to the body so that it is clear from the Mailer history what was sent via E-mail including the body of the message and any attachments.

Or you can create a single Mailer record by doing one of the following:

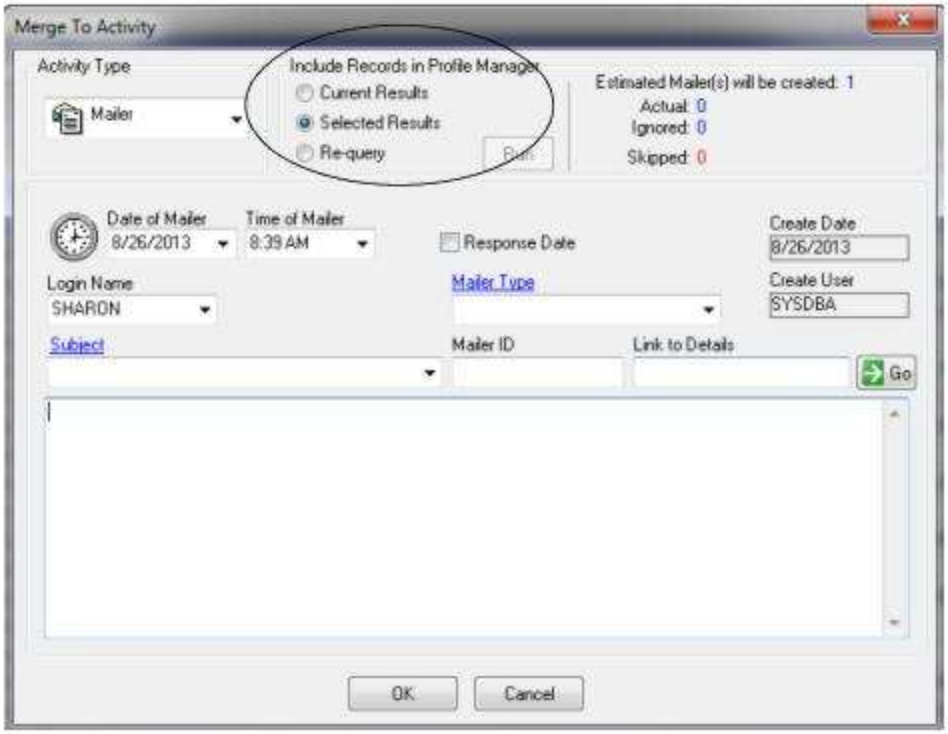
- Click **File|New|Mailer**. Make sure to check *Selected Results* in the *Include Records in Profile Manager* field to create for just one profile.
- Create a mailer by highlighting the client profile from a Profile Manager Query. Click Mailer on the toolbar. Make sure to check Selected Results in the Include Records in Profile Manager field to create for just one profile.
- Within a client profile, create a mailer from any folder by clicking *Mailer* on the toolbar.
- In the client profile Activity Tab, there are three buttons to the right of the results screen. Click *Add* to enter a new mailer; *Modify* to change or enhance a mailer; or *Delete* to remove a mailer.

To create mailers a new trip (such as sending an e-mail containing the Invoice), click the Activities Tab in the Res Card, and then *Add*. These mailers can be viewed from inside the Activity Tab in the Res Card and in the Client's Profile.

CREATING MULTIPLE MAILERS FOR CLIENTS

Create multiple mailers at one time for clients. Usually when you do a blast e-mail, send out multiple letters or labels, you create mailers at that time. To create multiple mailers for clients, Query up all the profiles for which you want to add a mailer and click *Mailer* on the toolbar, or go to **File|New|Mailer.**

Data Entry Screen For Creating Multiple Mailers



Activity Type: From the drop-down menu, select Note, Mailer, or Reminder. *Mailer* is the default.

Include Records in Profile Manager: Select *Current Results* (all records in results screen); *Selected Results* (the current record or previously selected records); or *Re-Query* to find the desired records.

Estimated Mailer(s) will be created: This area provides a summary of mailer(s) to be created - Actual, Ignored and Skipped.

Date of Mailer: Defaults to today's date. Enter a different date by clicking the drop-down menu to access a calendar. Double-click desired date or just key in date.

Time of Mailer: Defaults to system time at mailer entry or key in another time.

Login Name: Defaults to the user logged in at the time of creating the mailer. Choose a different user by clicking the drop-down menu.

Mailer Type: This field is 25 characters (alphanumeric) and allows for selecting from a user-defined drop-down list. Defaults are *Promotion (E-mail), Promotion (Print Mail), Trip Correspondence, and General Correspondence.*

Private: Check this box to mark mailer private. Only the sign-in agent and SYSDBA can access the mailer.

Subject: Enter the subject of the mailer by selecting from the drop-down menu. Subjects are setup in **Global Defaults|General Setup|User Defined Fields|Mailer Subject**. Using consistent subjects across all users' mailers allows for valuable reporting.

Remarks: Enter any additional free-flow remarks or instructions in the text box at the bottom of the mailer entry screen.

Create a Note or Reminder on the Fly

Need to create a note, or reminder on the fly? Click the icons on the toolbar from *inside a client's profile* to create a new activity and after entering information, decide what profile the record should be associated with. Be careful though, or you may end up creating activities for the wrong client, as every activity must be attached to a profile, so the system defaults the current profile you are in. If you make an error though, and attach the activity to the wrong profile, you can now use this feature to re-associate the record with the correct one.

To change the profile an activity is linked to, type a portion of the client's name (Last/First) and click the drop-down arrow to get a listing of matching profiles to select from.

Chapter 11: Using the Activity Manager to Manage Your Activities

This chapter demonstrates how to use the Activity Manager to manage key customer contacts and organize agent activities.

Introduction

Agent productivity is a requirement for agency success. To be productive, an agent must manage relationships with agency customers, record key contacts with customers, follow up on leads, and administer agent tasks and to-do lists. Wow, that sounds like a lot for an agent to do!

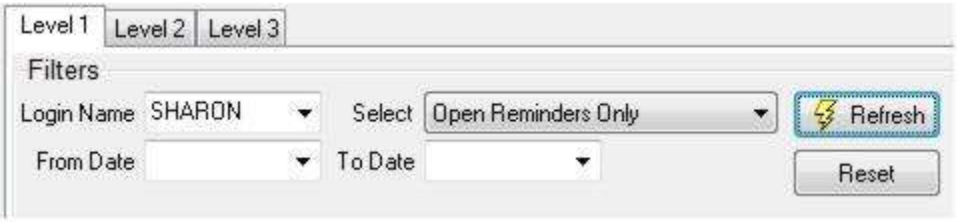
Fortunately, the *ClientBase* Activity Manager provides tools to achieve these goals in the form of **Notes**, **Reminders** and **Mailers.** Agents learn how to use these powerful tools to develop habits which ensure their own increased productivity. An agent who is well-organized and productive is likely to have a following of happy customers. Your agency's marketing and management team benefit as well.

Querying Activities

After agents begin using Notes, Reminders and Mailers (as detailed in chapter, **An In-Depth Look at Activities**) to document vital customer contacts, they start each work day by signing into *ClientBase* and clicking the *Activities Manager* tab. By default, *ClientBase* queries the database for the user login's open reminders and the results screen immediately displays a list of the reminders (or tasks) the agent needs to complete each day.

At the top of the results screen, notice tabs marked Level 1, Level 2 and Level 3. An agent uses the Level 1, 2 and 3 Query filters to access customized activity (contact) queries. These queries can be quite valuable as productivity and management tools.

Level 1 Activity Manager Query



The Level 1 Activity Manager Query contains four fields which are strung together with an “and”. (Another way of saying this is that **All** fields are evaluated to form the results of the query.) After setting up the selection criteria, and clicking *Refresh*, the Query results appear in the results screen.

Login Name: Defaults to the sign-in user. Choose a different user by clicking the drop-down menu. This is useful if an agent is absent, and you want to check his to-do list for high priority items.

Select: Defaults to *Open Reminders Only*. Choose a different entry by clicking the drop-down menu. Choose *Open Reminders Only, Open Reminders With Alarms, Closed Reminders Only, All Reminders, Mailers w/o Responses, Mailers With Responses, All Mailers, All Notes, Reminders,* and *Mailers*.

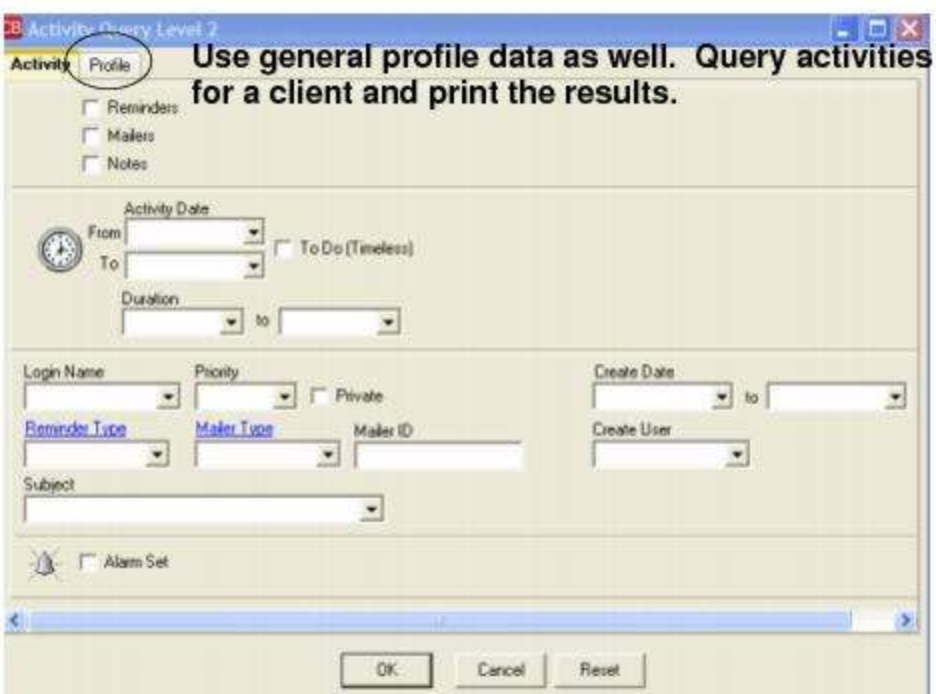
From Date: To select a specific date range for the Query, enter the from date here; or click the drop-down menu and double-click a date from the calendar.

To Date: To select a specific date range for the Query, enter the from date here; or click the drop-down menu and double-click date from calendar.

Refresh: After setting up the Level 1 Query, click *Refresh* to run the Query.

Level 2 Activity Manager Query

The Level 2 Query area of the Activity Manager provides the ability to Query the database of Notes, Reminders and Mailers by virtually any field captured in these records, and includes the ability to Query by a particular client as well. Track the type of marketing tasks scheduled, when and if they have been completed, which agents are completing them, the mailings that are being sent and the response to those mailings. The options are endless.



By clicking the *Level 2 Tab* in the Activity Manager, and then, *Filter*, under the *Activity Tab,* enter selection criteria into the following screen. Since Level 2 Query “remembers” the last Query run, click *Reset* to clear. Like Level 1 Query, the fields are strung together with “ands” across the fields, but within the field you can use “or” to narrow down the search even further. After setting up the criteria for Activities, click *OK* to activate the specialized list.

ACTIVITY TAB

Reminders/Mailers/Notes: Check which type of activity to include in the Level 2 Query.

Completed/Responded: When you have checked the activity type, a drop-down menu appears from which to qualify the activity: *All, Completed/Responded/, or Not Completed/Not Responded.*

Activity Date - From/To/To-Do (Timeless): Choose a range for the activity date, or if you prefer, choose the timeless to-do’s.

Duration: Choose the activities by duration by clicking the drop-down menu.

Login Name: The login name defaults to the sign-in agent, or choose from the drop-down menu.

Priority: Choose the priority type from the drop-down menu.

Private: Choose those activities which were marked private.

Reminder Type: Choose from the drop-down menu the customized reminder types.

Create Date - From/To: Choose a range for those activities created within a certain time frame.

Subject: Choose activities by subject from the drop-down menu.

Reservation: Choose the activities related to a particular trip from the drop-down menu.

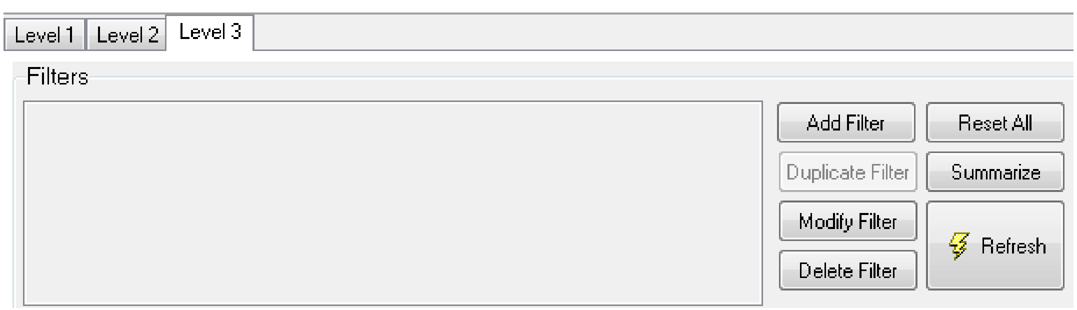
Set Alarm: Choose the activities for which you have set alarms.

PROFILE TAB

Use general profile data as filters when running a Level 2 Query in the Activity Manager. Query by profile to locate activities and print results, as well as enhance your ability to Query lists of activities.

Level 3 Activity Manager Query

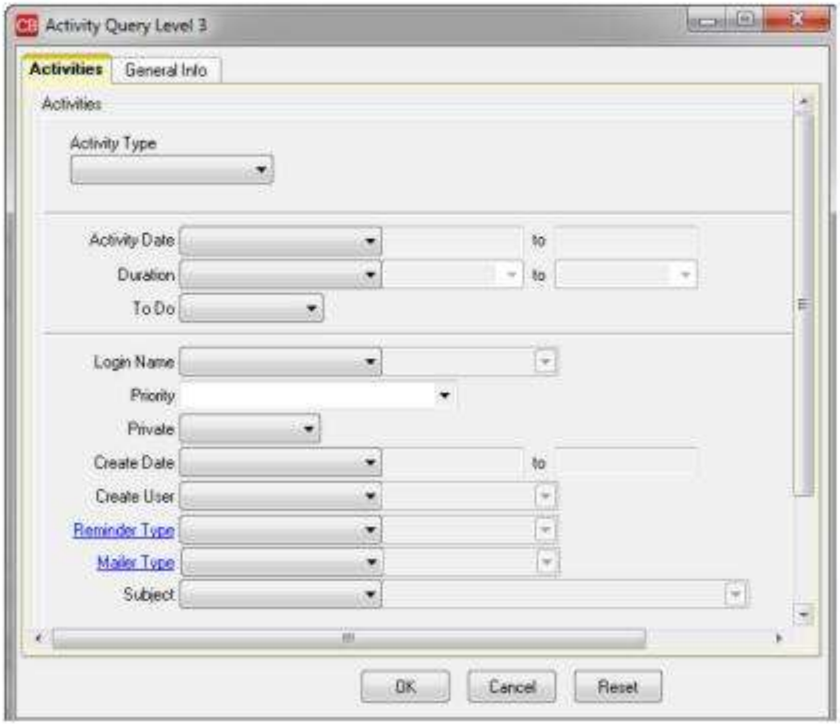
The Query Level 3 provides users with an even greater ability to more narrowly define a search. As detailed above, Level 2 Query allows a search by any number of fields, stringing one statement of criteria together with an "and." Query Level 3 strings multiple statements of criteria together with an "or," using search method options to define how the criteria should filter. The Level 3 Query has a totally different look from Level 2 Query:



There are a set of buttons including *Add Filter, Duplicate Filter, Modify Filter, Delete Filter, Reset All* (to clear out all filters currently displayed), and *Summarize*. **Notice there will be nothing to view in the results screen until set up the criteria statement(s) and click *Refresh* to see the Level 3 Query results.**

Note: It is not necessary to completely re-enter the criteria when adding similar filters. Once the first filter has been added to a Level 3 query, the *Duplicate Filter* button is enabled. When clicked, a Level 3 query screen is opened, pre-populated with all of the criteria from the selected filter. Users can also right-click on a filter and select *Duplicate Filter*.

To enter the search criteria into Level 3 Query after clicking *Reset All*, click Add Filter:



Activities folder tabs, *Activities* and *General Info appear.* What is unique about the Level 3 Query is that most of the available search fields are divided into two parts. Directly to the left of the field, is a box with a drop-down menu of search method options called, Operators, with which you can narrow down your search. Sample Operators include: *Is Equal to; Less than or Equal to; Greater than or Equal to; Less than, Greater than, Not Equal to; Starts With; Contains; Is BLANK;* **and** *Is NOT BLANK.* Search fields are strung together with an *And.* Use both tabs to setup the first filter or your query, and click *OK.* Click *Refresh* to see the results of your first filter.

To set up a second filter, click *Add.* Remember as you are setting up subsequent filters, there is an OR between all the filters you are stringing together.

Using Date Formulas in Queries

Since queries can be saved and retrieved for frequent use, the date fields in all queries allow for date formulas. This means any field that has a date, can also contain a formula for that date. The date formula function allows you to create a query without identifying a specific month, day and year in the *From* and *To* date fields. Instead, the query is processed with a formula for the month, day, day of the week, and year based upon the date the report is processed.

Remember: Make sure the system date and time are correct.

Benefit: When entering a date formula, your system converts it to the intended time period allowing you to run queries and/or save them for future use without the need to modify dates.

Example: The following tables contain sample formulas for specifying dates. Mix and match the absolute and relative parameters in the function. The first number specifies the day of the month, the second number specifies the month, and the third number specifies the year. So if you only have the first number filled in, this means you want this report to reoccur on this day every month, in every year.

DATE FORMULAS:

If You Want This	Enter This
1st day of this month:	=1,0,0
Last day of this month:	=31,0,0

1st day of this year:	=1,1,0
Last day of this year:	=31,12,0
Seven days from now:	=+7,0,0
Last Monday (will show today if today is Monday)	=Mon
A week from last Monday	=Mon-1
Next Monday	=Mon+1
Three months from now	=0,+3,0
Six months ago:	=0,-6,0
One year from now	=0,0,+1

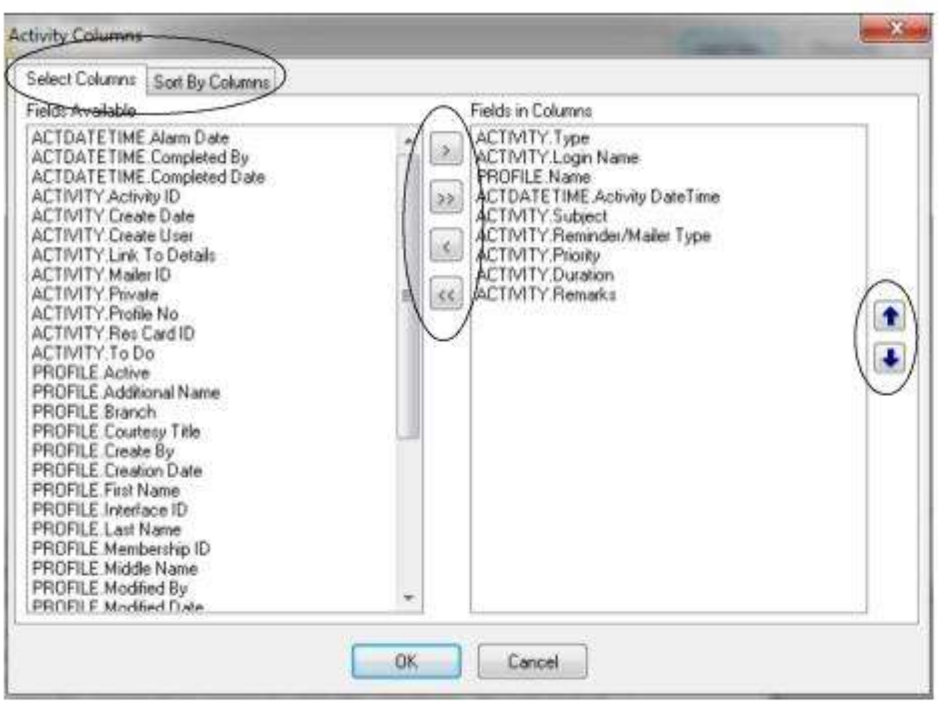
Save Queries for Easy Access

As you can see, queries run in the Activity Manager can become quite complex. With all the available filters in Level 1, 2, and Level 3 Queries, you can view any list of marketing activities performed (or not) within the agency. With this in mind, if there are certain queries that to run often, we suggest you save the query filters after setting them up. This is called saving a query to a folder. That way, the next time you run a saved query, all you do is click the saved folder. One click and your query filters are completed automatically.

Here are some steps for saving a query:

1) Using Level 1 and Level 2 filters in the Activity Manager, run your query (use date formulas, if applicable).

2) To customize the columns used in the query, click *Columns* on the Activity Manager results screen.

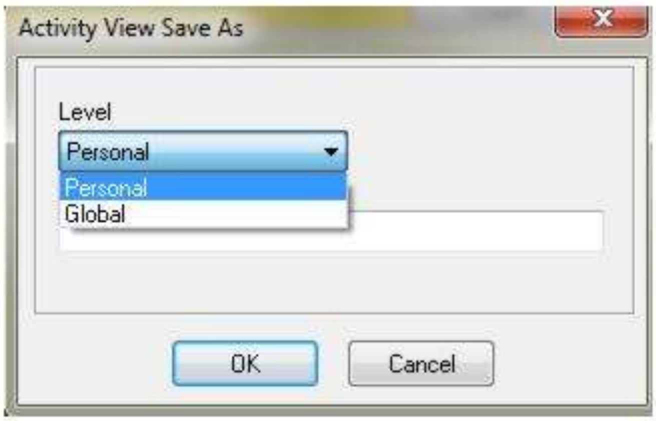


If you would like to change a column, move the highlighted column over to the other side by using the **>** or **<** arrow. By using the shift key and mouse, select as many consecutive entries as you want to move and use the **>>** or **<<** arrows. By using the control key and your mouse, select non-consecutive entries to move. Use the up and down arrows to order the selections. To sort up to 3 columns in ascending or descending order, click *Sort by Columns.*

Arrange and size the columns in the query by inserting your mouse between the column headers (see a bi-directional arrow), hold down the left mouse button, and pull the columns to the new size.

To move a column to a different location, hold the mouse over the column in the column header you want to move (see a vertical line extending down). Press the left mouse button and pull the column left or right to its new location. To "quick" sort results, hold down the shift key and click the column header to sort by. A triangle in the up position appears within the header signifies ascending order, while a triangle in the down position signifies descending order.

3) When satisfied with the query results, click **File|Save Query As**. The following screen appears:



4) From the drop-down *Level* menu, choose whether to save Query as *Personal* (for your own use only), or as *Global* (for the use of everyone in the agency).

5) Name the query.

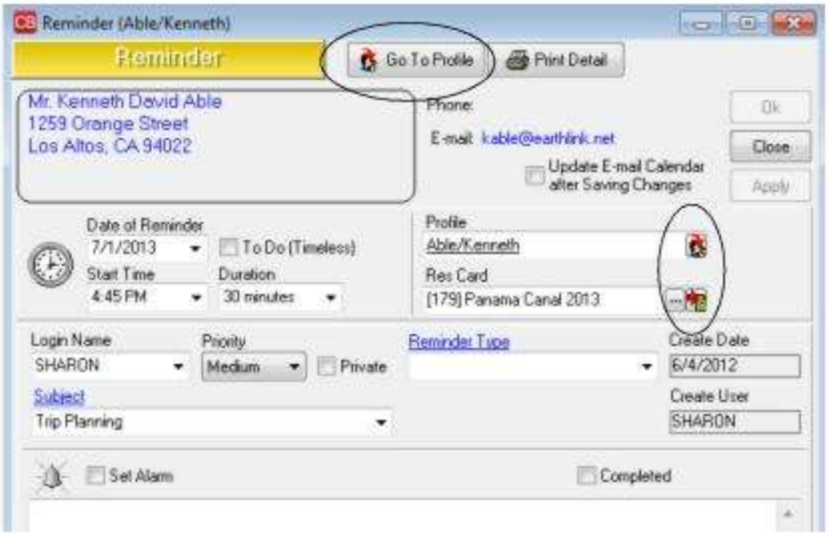
6) Click *OK*. See the new query located on the left hand side of the Activity Manager screen.

Note: *ClientBase* saves the filters and results layout you have selected, **not** the query results. The next time you use the saved query, any new data that has been added since it was created, is included in the new query.

Working with Query Results

As mentioned previously, at the beginning of each day agents click the Activity Manager to access their to-do lists. By default, *ClientBase* queries the database for the login user's open reminders and the results screen immediately displays an organized list of the reminders (or tasks) that the agent needs to complete that day.

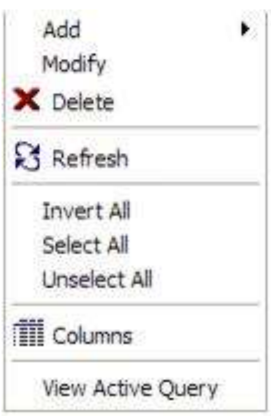
An agent can view the originally formatted reminder and its details by double-clicking the highlighted reminder. Once inside the reminder, the agent can hot-key to the attached profile by clicking *GoTo Profile* icon at the top of the reminder screen, or beside the *Profile* field. The agent can also hotkey into the Res Card if desired.



Toggling from each task in the reminder list to the profile and back is simple and quick. From the profile, access marketing, traveler or other key data that adds the personal touch necessary for effective relationship-building. Click the activities tab of the profile to refresh your memory on previous contacts you've had with the client. Print out the reminder by clicking the printer icon in the toolbar.

Click in the *Completed* box located within the reminder record to indicate when a reminder has been completed. This brings up a date field in which you can input a date or use the down-arrow key to access a handy calendar. This removes it from your to-do list (after clicking *Refresh*), but leaves the completed record for history within the profile's activity tab.

Once you've developed the habit of following up on travel inquires, begin using reminders to organize other marketing and administrative tasks, such as payment deadlines, checking for documents, welcome home calls, etc. Reminders can also be used to jog your memory of personal obligations such as dentist appointments, picking up dry cleaning, etc. Since all reminders need to be attached to some type of profile, use your agent profile to create these type of personal reminders.



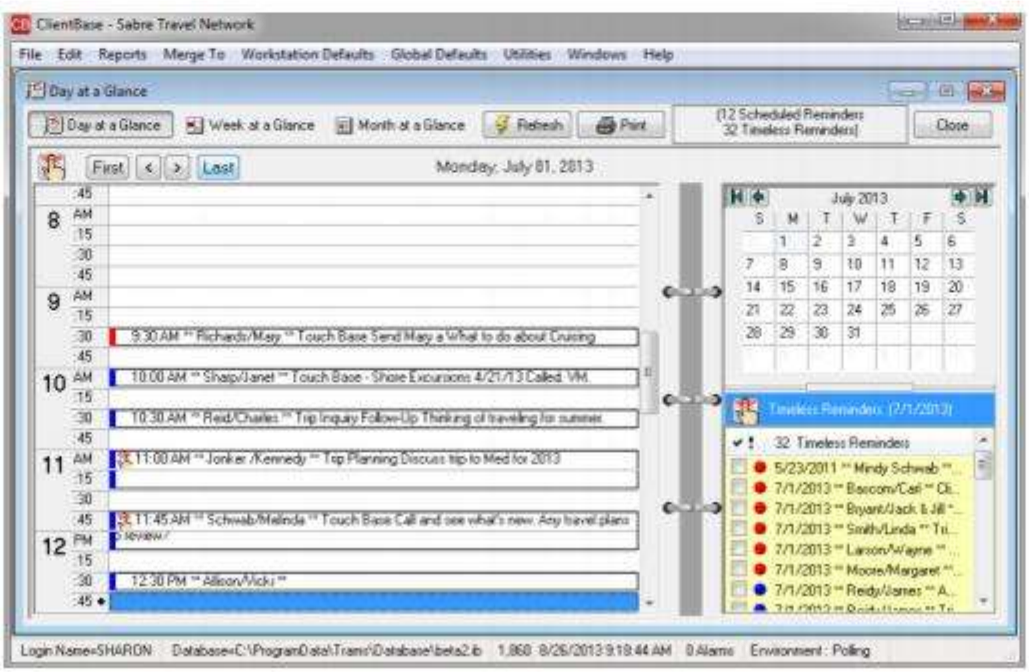
By right-mouse clicking the results screen, access the ability to add, modify, or delete a reminder, note or mailer. You also have the ability to Refresh the Query, Invert All, Select All, Unselect All, modify Columns and View Active Query.

Retrieve the profiles of your most loyal customers and schedule at least 4 occasions each year to reach out and touch them. Remind them often of how valuable they are. Use things like birthdays, anniversaries, annual vacation times and holidays as a reason to communicate with customers. Every time you put your agency in front of customers, you re-enforce relationships, reminding them <u>you</u> are their travel professional.

At A Glance

In addition to reviewing a list of the reminders scheduled every day, an agent can click *At A Glance* to review the schedule in a daily, weekly and monthly planner format. User logins have their own *At A Glance*, and each *At A Glance* can only be viewed while logged in as that user. If you have completed a Query for another agent, you are **not** be able to click *Day-At A Glance* to view those Query results; since there is no correlation to the Query parameters.

The *Day-At A Glance* displays today's date and is divided into fifteen-minute time increments for any appointments or calls scheduled for the day. These time/duration reminders are marked by you within a specific time frame when they are created. The reminders checked as *Timeless To-do's*, appear on a list at the right hand side of *At A Glance.* Create new reminders quickly by clicking the reminder icons or right-mouse clicking in the *At A Glance* view.



Create a new reminder from inside At A Glance by using the handy icons or right-mouse clicking the calendar. Print out your calendar by clicking on the print icon.

REMINDERS AS APPOINTMENTS

When clicking *At A Glance*, a daily calendar displays reminders that have been scheduled for a particular time in 15 minute intervals. The reminders that have been set as "timeless" appear to the right under an area called *To-Do* list. On the top right corner is a calendar for the current month that provides the ability to look at a schedule for any other day of the month by clicking that day. Or look at your schedule for any day of other months by clicking the arrows to left and right of the month.

Rearranging your schedule in the *Day At A Glance* format is a snap. To change the time of a particular reminder, locate it on your schedule and place your cursor over the record so that it turns into a four-sided directional arrow, click and drag to the desired time, and then release. To adjust the duration, or time of a reminder, place the cursor on the bottom or top of the record so that you see a double-sided directional arrow, click and drag to the desired length, and then release. Change the date of a reminder by placing the cursor over the record so that it turns into a four-sided directional arrow, click and drag to the appropriate date on the calendar in the top right corner, and release.

Double-click the reminder to enter the original reminder entry screen. From there you can view the original Reminder entry. You can also hot-key to the actual profile to review any information by clicking *Go To Profile*. Or hot-key into the Res Card trip (if applicable) the Reminder was created for. When you have completed the activity listed on the Reminder, whether it be making a phone call or sending an e-mail, click the box marked *Completed*. When you mark this box, a date field appears for you to leave today's default date or enter a date by accessing a calendar from the drop-down menu. Click *Refresh* to update *At A Glance* and remove any completed Reminders.

Navigation buttons at the top of the At A Glance window provide more ease in paging through any scheduled Reminders for a particular day.

First: Takes you to the first scheduled Reminder for the current date displayed on the At A Glance.

<: Takes you to the previous scheduled Reminder for the current date displayed on the At A Glance.

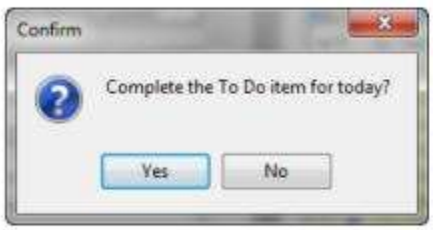
>: Takes you to the next scheduled Reminder for the current date displayed on the At A Glance.

Last: Takes you to the last scheduled Reminder for the current date displayed on the At A Glance.

View you calendar a *Day at a Glance, Week At a Glance, or Month at a Glance. Refresh* you calendar when you have made a change, or *Print*.

REMINDERS AS TO-DO'S

To the right of your calendar is a list of To-Do's. These are the Reminders you created and marked as timeless. Notice there is a different color next to each Reminder. Those marked as red are high priority; those marked as blue are medium priority; and those marked as gray are low priority. Click the To-Do once and a summary of the Reminder appears in a text balloon format. By double-clicking the Reminder, go into the original Reminder entry screen. After completing the Reminder, either close it out by checking the Completed box in the Reminder entry screen, or put a check mark beside it on the To-Do List. You are prompted with a dialog box. By clicking *Yes* to complete the item, it is closed out with today's date.



Click *Refresh* to update *At A Glance* and remove completed *To-Do* items. Any timeless reminders (To-Do items) that are not completed on a particular day follow the *At A Glance* to the current date. Therefore, any tasks not completed are not forgotten! For an expanded view of the To-Do list, click the little bar with two blue up arrows directly above the list. A button appears above the scheduled reminders, which when clicked, allows you to create a new scheduled reminder. A button has also been added above the timeless To-Do reminders, which when clicked, allows you to create a new timeless reminder. Right-click anywhere within the At A Glance window and to create a new reminder.

To see the appointments and To-Do's scheduled for the week, click *Week-at-a- Glance.* This lists the week in a Monday to Sunday display. At the top of the screen is a total summary of all appointments and To-Do's scheduled for the week. When you click the weekday that contains the appointments, it takes you into the At A Glance screen to add/modify/delete entries.

There is also a *Month At A Glance* format:

Agents can view appointments and To-Do's scheduled for an entire month. By clicking the day in the month that contains the appointments, you go into the Day-At A Glance screen to add/modify/delete entries.

How to Multi-Select Records

To multi-select records from the results of a Query, use the CTRL key in combination with a mouse click. Notice one of three symbols next to each profile:

a) **Bullet** - Signifies this profile has been selected.

b) **Bullet and Bracket** - Signifies this profile has been selected and is the current profile record the cursor is focused on.

c) **Solid Triangle** - Signifies this profile has NOT been selected as part of the multi-select, but is the current record the cursor is focused on. CTRL and click once to get the Bullet and Bracket, and a second time to NOT include in the multi-select.

Also use the edit menu or right-mouse click the results screen to *Select All*, *Unselect All* or *Inverse* the selection. To delete multiple activities, use the multi-select feature, and click *Delete*. This permanently deletes these highlighted records at one time.

Globally Modify Activities

From the results of a query generated from the Activity Manager, the database administrator can globally modify any of the fields within those results by going to **Utilities|Global Modify**. Now, if an Agent leaves your agency and you want to reassign all open reminders to another agent, Global Modify them all rather than changing one by one. Or, if you have a group of Reminders that you just completed and want to mark closed, Global Modify them rather than closing one by one.

Important Note: Using any of the Global Modify features should be done with extreme care. Massive changes to your database can be accomplished with a single click. If you are in any way unsure of the expected results of running Global Modify, be sure to backup your database using the *Trams* IBBackup utility just before running it.

1) After using the Level 1, 2 or Level 3 Query to locate the Activities to Global Modify go to **Utilities|Global Modify**. You have two different global modify features to choose from.

Set Value - This feature allows you to designate what type of Activity within your results to modify, Notes, Reminders or Mailers (you can only globally modify one type of activity at a time), along with the ability to select which field within that type of record you would like to modify. A listing of the fields within that type of activity appear for you to set a common value. Once these settings are complete, you have the ability to identify which records in the Activity Manager to modify based on either all current results, only selected results or a range of results.

Convert Type - This feature allows you to turn Notes into Reminders or Mailers, Mailers into Notes or Reminders, and Reminders into Notes or Mailers. First designate what type of Activity within your results to convert, Notes, Reminders or Mailers (you can only globally modify one type of activity at a time). Then select what type you would like to convert them to. Once these settings are complete, you have the ability to identify which records in the Activity Manager to modify based on either all current results, only selected results or a range of results.

2) Once all settings are complete click the *Global Modify Now* button and a count appears identifying the number of records modified, skipped and the total. Records skipped are a result of having multiple types of Activities within your current query results.

Chapter 12: An In-Depth Look at Res Cards

This chapter provides a detailed overview of the Res Card feature in ClientBase.This chapter contains directions for creating a Res Card, invoicing, and more.

Suggested order of setup for invoicing (detailed set up directions are found in chapter, *Set Up ClientBase for Your Agency.*

☐ Go to **Utilities|Branch** and for each branch, enter a unique series of invoice numbers. (Add refund and receipt numbers as needed.)

☐ Go to **Utilities|Branch** and for each branch, setup canned Remarks, and Format Settings for Invoices. (Setup these for Trip Proposal, Itinerary, Trip Statement and Receipts as needed.)

Note: Best not to set up the Header and Footer in this area.

☐ Go to **Global Defaults|General Setup|Header/Footer** and setup a header/footer for Invoices. If agents have a different logo, this can be done using instructions in chapter, *Set Up ClientBase for Your Agency.* (Setup for Trip Proposal, Itinerary, and Trip Statement as needed.)

☐ Go to **Global Defaults|ResCard Defaults** to setup your res cards and invoicing default options.

☐ Go to Chapter, *An In-Depth Look at Live Connect* and setup your Live Connect Providers.

Introduction

As your agency implements *ClientBase* and begins reaping the rewards of improved customer relationships and effective marketing programs, your leisure travel sales should start increasing. To help 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* Res Card as a home for the many details involved in planning each and every trip for customers and as a tool that helps manage the entire trip planning process.

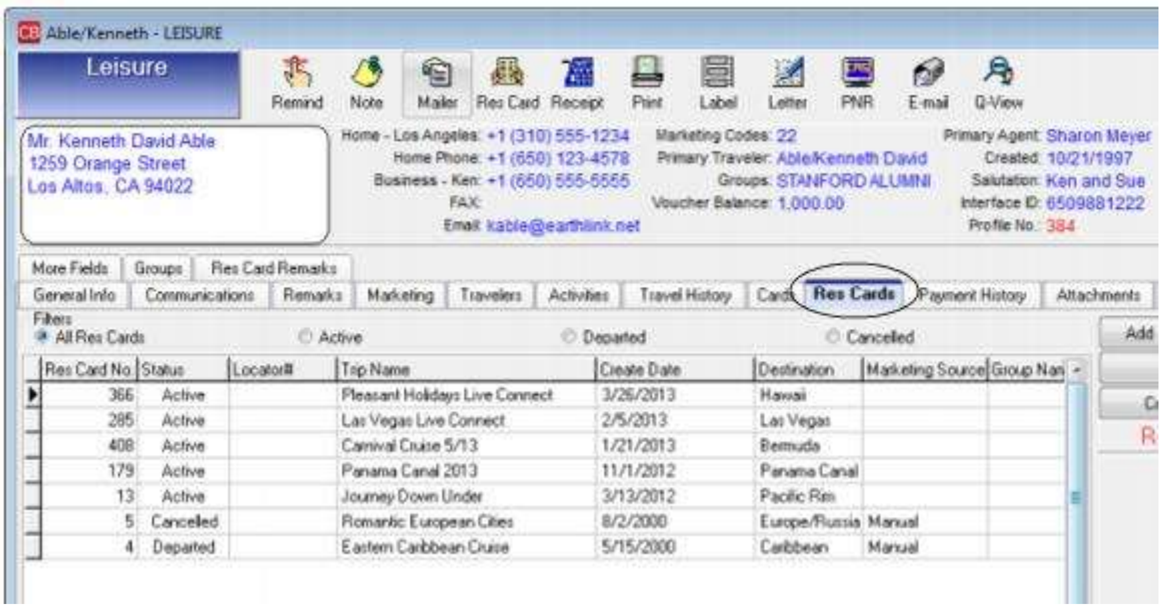
Regardless of the technology your agents use or don't use, regardless of your niche or type of business, regardless of how long your agents have been in the business, there are certain fundamental components involved in the *trip planning process*. The *ClientBase* Res Card has been designed to help 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* provides a perfect tool to integrate all processes in trip planning. By setting up an "electronic" Res Card, an agent can document the client's first call by creating a *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 can capture details of reservations and print out client quotes or itineraries. By using the Live Connect feature in *ClientBase*, agents have the ability to book reservations via on-line booking engines and then pull all that reservation detail back into the Res Card.

When the client books the trip, the agent produces invoices and trip statements, while tracking invoiced and uninvoiced balances. Additional notes and reminders can be created to remind an agent of a final payment date or a document confirmation. When the customer returns home, the agent can document his remarks and suggestions. Because all client trip data is in one localized area, reports such as Final Payment, Vendor Booking and Service Provider Activity can be produced for Res Cards in all stages of implementation of the trip planning process.

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*. Invoices generated through the Res Card maintain their own numbering system, separate from the numbering system of invoices generated through interface.

Since each Res Card represents one trip, customers are likely to have multiple Res Cards in their profiles at any one time in the *Res Card* tab. Depending on your agency's needs, enter as much or as little trip information on each Res Card as desired. When talking with 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! Click the *Res Card* tab in the client profile to find a summary of the Res Cards created for this client, with each Res Card representing a different trip for the customer.



Four Ways to Create a New Res Card

There are 4 ways to create a new Res Card:

1) Create a reservation card by highlighting the customer profile in the results screen of the profile manager, and clicking the toolbar Res Card icon. Also create a Res Card anywhere inside the profile, as well, by clicking the toolbar Res Card icon.

2) In the Res Card tab in the client's Profile, click *Add*. To modify or delete an existing card, highlight the card and click *Modify* or *Delete*.

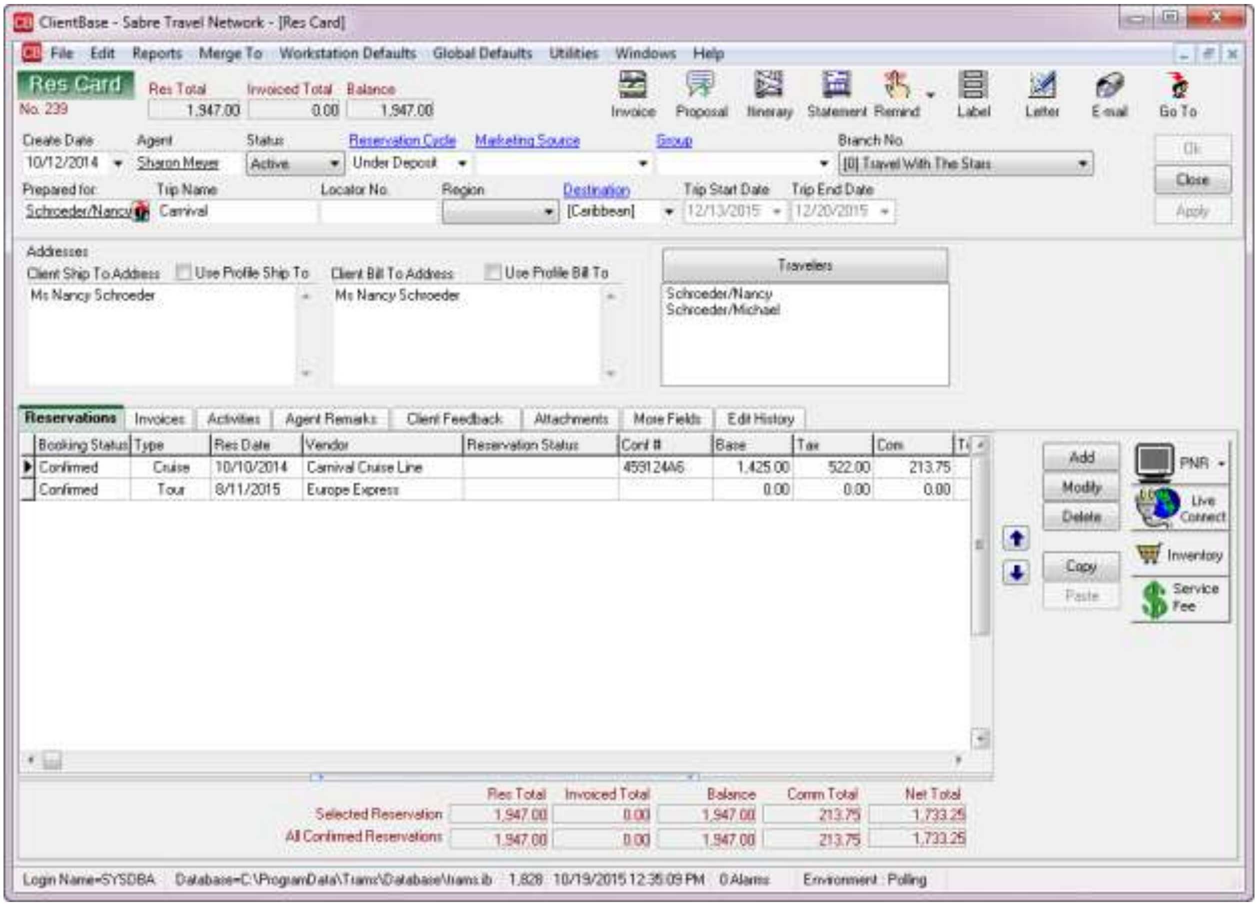
3) Copy an entire Res Card from one profile to another. Most of the data captured within the Res Card is copied including general Res Card information, reservation records and agent remarks. The data that does not copy includes the Res Card create date, invoices, activities, client feedback about trip, profile-specific information (such as the bill to/ship to addresses) and traveler related fields (such as traveler names, seat assignments, ticket numbers, etc).

To copy an entire Res Card, simply highlight the one to copy (do not open the Res Card) and click *Copy*. Next, close the profile, and retrieve or create the profile you want to copy to, select the Res Card tab and click *Paste*.

4) Need to create a Res Card quickly on the fly? Click the Res Card icon the toolbar and after entering Query data, decide what profile the record should be associated with. Be careful when creating a Res Card like this, however, or you may end up creating it for the wrong client. As every Res Card must be attached to a profile, the system defaults the current profile highlighted in the current manager. If you make an error though and attach the Res Card to the wrong profile, re-associate

the record with the correct one by typing a portion of the client name (Last/First) in the Res Card *Prepared For* field, and clicking the drop-down arrow to get a listing of matching profiles from which to select.

Anatomy of a Res Card



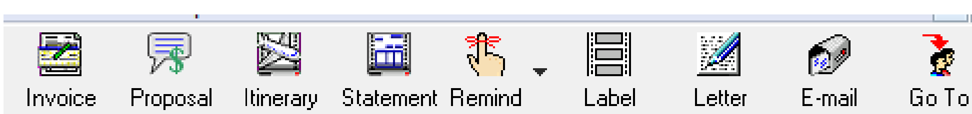
Res Card Components

The Res Card consists of toolbars, trip preliminary information entry fields, and Res Card tabs for adding or viewing Trip Reservations, Invoices, Activities, Agent Remarks, Client Feedback, More Fields, Attachments, Multi Currency (if using), and Edit History. As many or as few of these fields can be completed, but there are some mandatory fields which are marked with **.

RES TOTAL/INVOICE TOTAL/BALANCE

At the top of the res card, in a stand-out color, see Reservation Total, Invoice Total, and Balance.

RES CARD TOOLBAR TOP



Invoice: Click *Invoice* in the Res Card toolbar to generate an invoice or a refund invoice for your reservation. When generated, this invoice information appears in *Trams Back Office* and update accounts accordingly. See section below entitled, *Generate an Invoice*.

Proposal: Click *Proposal* in the Res Card toolbar to generate a client quote. See section below entitled, *Generate a Proposal*.

Itinerary: Click *Itinerary* in the Res Card toolbar to produce a customized itinerary for your reservation. See section below entitled, *Generate an Itinerary*.

Statement: Click *Statement* in the Res Card toolbar, to generate a client's Trip Statement. See section below entitled, *Generate a Trip Statement*.

Reminder: Click *Reminder* in the Res Card toolbar to generate a single reminder or batch reminders (setup in the Global Defaults) for your reservation. When generated, single or multiple reminders are automatically created in the Res Card Activity Tab and in the Activity Tab of the client profile and appear on the agent's To-Do list on the specified date. See *Launching Batch Reminders* and the *Activities* section below.

Label: Traveler/Contact merge fields used in Labels are populated using data from the Res Card Travelers and Profile merge fields are populated using data from the Res Card Profile. When a mailer is created as a result of using Merge To features from the res card, that Mailer will be linked to the Res Card Activities.

Letter: Traveler/Contact merge fields used in Document Templaes are populated using data from the Res Card Travelers and Profile merge fields are populated using data from the Res Card Profile. When a mailer is created as a result of using Merge To features from the res card, that Mailer will be linked to the Res Card Activities.

E-mail: Merge to E-mail from the Res Card has all the primary e-mail addresses of the Res Card Travelers selected by default. Non-primary e-mail addresses for the Res Card travelers are also available, but unchecked by default, as will profile level e-mail addresses from the Res Card profile. When a mailer is created as a result of using Merge To features from the res card, that Mailer will be linked to the Res Card Activities.

Go To: To quickly hop into the profile for the client, click *Go To* in the Res Card toolbar.

RES CARD TOOLBAR RIGHT SIDE

PNR Import: Click here to *Merge to PNR* (merge client information to a PNR), or do a *Import PNR* (reservations stored within an Amadeus, Sabre, Worldspan, or Apollo/Galileo PNR can be imported into *ClientBase* and new reservation records can be created within the reservation tab of the Res Card). Please refer to chapter, *An In-Depth Look at PNR Import.*

Live Connect: This is a link to Live Connect from the main res card screen, and you also have a link at the reservation level. If you are using a Live Connect Provider, but are not sure yet of the vendor (maybe you are looking for a tour and are checking out a vendor), use this link. After the booking is pulled into *ClientBase*, the vendor is filled in. For details on how to setup and use all Live Connect providers, please refer to chapter, *An In-Depth Look at Live Connect.*

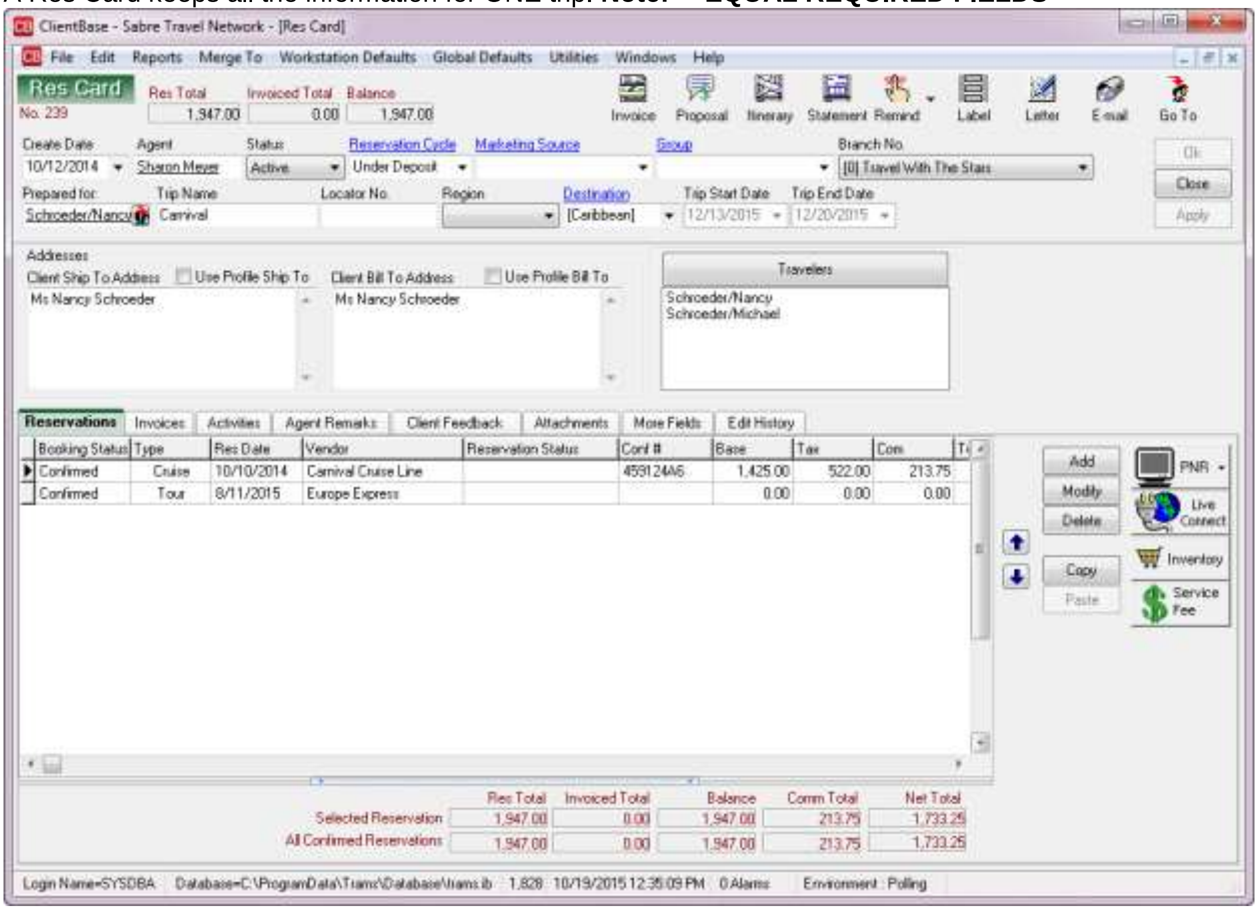
Inventory: Click the *Inventory* icon to connect to a database of inventory while working in the Res Card. To query inventory for a particular client's trip, create a res card for that client from the res card main screen, click *Inventory.* Or from the *Reservation Tab,* click *Add,* set the Travel Category, and click *Inventory*. A Level 2 Inventory Query screen appears to query your database of inventory based upon the travel needs of the client. For complete directions on creating and using inventory, please refer to the section *Creating and Using Inventory.*

Service Fee: To create a service fee record for a trip you are managing through the Res Card, click *Service Fee* located in the reservation tab and a new reservation record is created automatically with a travel category of service fee, and with your agency profile as the vendor. All travelers entered into the Res Card defaults into this service fee record and the number of travelers is defaulted accordingly. If the default service fee amount entered into Global Defaults is a per traveler fee, then check the *Charge As Per Person* and the amount is multiplied accordingly. Use the normal Res Card *Invoice* feature to generate an invoice the service fee.

Reservation Totals: View a grand total of any confirmed reservations including *Res Total, Invoiced Total, Balance* and *Commission Total* appearing in red. In addition to seeing the totals for all reservations, you can now also see these amounts for each individual reservation. Click the desired reservation and the *Res Total, Invoiced Total, Balance* and *Commission Total* for just that reservation appears to the right of the heading *Selected Reservation*. To hide these totals, click the *splitter* at the bottom of the screen.

Trip Preliminary Data Entry in New Res Card

A Res Card keeps all the information for ONE trip. **Note: **EQUAL REQUIRED FIELDS**



****Create Date:** Defaults to today's date or enter another date. By clicking the down arrow, double-click the desired day from the calendar.

****Agent:** Defaults to log-in agent or enter another agent name from the drop-down menu. This field represents the agent primarily responsible for managing this trip.

****Status:** Enter the status of the trip from the drop-down menu. Choices are *Active, Departed, or Cancelled*. (This area needs to be updated when the trip is in a different status.) All Res Cards created with an *Active* raise an indicator icon when retrieving the profile. This way, whenever agents are viewing the profile, they are aware that an active Res Card exists.

Reservation Cycle: Enter where the trip is in the reservation cycle from the drop-down menu. Default choices are *Lead, Booked, Under Deposit, Paid-In-Full, Returned From Trip*, or customize the default list for the user-defined *Reservation Cycle* field by going to **Global Defaults|General Setup|User Defined Fields|Reservation Cycle**. By faithfully changing the status of the reservation cycle, print out reports to view what reservation cards are in each reservation cycle per agent.

Marketing Source: Enter the source of the booking from the drop-down menu, or customize the default list for the user-defined *Marketing Source* field by going to **Global Defaults|General Setup|User Defined Fields**, or by clicking on the blue field label (if permitted). This marketing source can be used to evaluate the success of a mailing.

Group: Enter the group name for trip from the drop-down menu. These entries are user-definable under **Global Defaults|General Setup|User Defined Fields|Groups** and this table shares the same table in *Trams Back Office*, so any profile marked with a group name in *Trams Back Office*, is also tagged in *ClientBase* and vice versa.

****Branch No.:** Defaults to the branch entered into the log-in agent's profile or enter branch from the drop-down menu.

Prepared For: Field defaults to primary profile name/s. Click the red profile icon to right of field to review profile information or click on *Go To* in the Res Card Toolbar. To change the profile to which the Res Card is attached, type a portion of the client name (Last/First) in this field, and click the drop-down arrow to get a listing of matching profiles from which to select.

****Trip Name:** Enter the name of the trip.

Locator No.: Enter a record locator number if available.

****Region:** This area includes a hard-coded set of regions and is populated by selecting from a drop down listing;

****Destination:** Enter the region/destination of the trip from a detailed list in the drop-down menu. These entries are user-definable under **Global Defaults|General Setup|User Defined Fields|Res Cards**: **Region of Trip**, or by clicking on the blue field label if permitted. The user definable Destinations also include the ability to be linked to one of the hard coded Regions. Upon creating a Res Card, if the Region field is completed first then upon selecting a Destination the drop-down listing will only include a subset of those Destinations linked to that Region. If Allow Freeflow is not checked (forcing the users to select from the drop down listing) then multiple Destinations can selected and inserted into one Res Card.

Trip Start Date/Trip End Date: Enter trip dates here for reference, but this field is not required. When dates are entered into a reservation, these date fields are updated by the reservation dates and become read-only.

Addresses: The client ship to and bill to addresses default to addresses setup in the client profile. Upon creating a new Res Card, the user profile address defaults to being checked, so unless the check is removed, any changes to the profile address automatically updates the corresponding Res Card address. To manually change an address, uncheck the appropriate box (not suggested, as if you update the profile you'll have a permanent address change and the Res Card will automatically be changed).

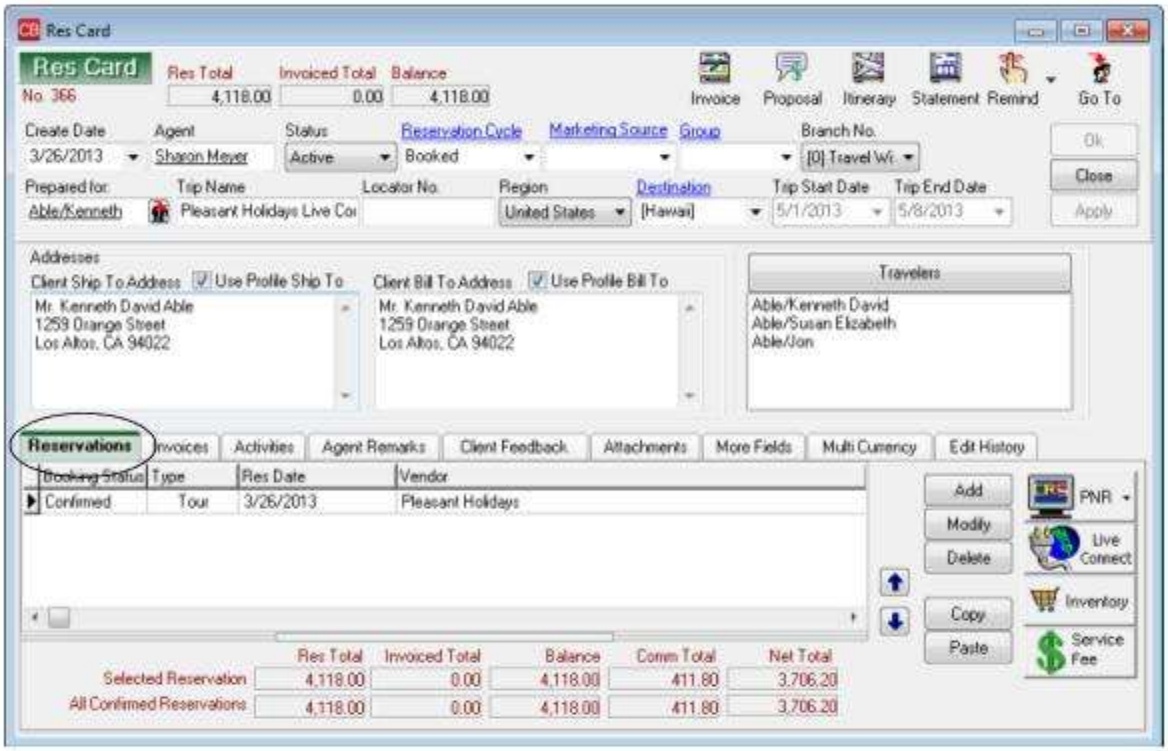
Travelers: Identify the travelers traveling on this trip by clicking *Travelers* at the top of the field. (The default order that Res Card Travelers are listed in is the same as the order that the Profile Travelers are listed in at the time the Res Card is created.) The Res Card Primary Traveler defaults to the Profile's Primary Traveler. This default can be changed by clicking in the *Primary* box. Under *Type,* signify if the traveler is Adult, Child, or Infant. Repeat this for any other travelers going on this trip. If you want to add a Traveler who is not usually part of the Profile, click *Add.* You have the option to add the traveler to the Res Card only, or to the Res Card and Profile. You also have the ability to edit the name of a Res Card traveler that is not directly linked to a profile. You may want to *Search* first, however, before adding a new Traveler to check to see if that Traveler is already in the database.

Reservation Totals: View a grand total of any confirmed reservations including *Res Total, Invoiced Total, Balance* and *Commission Total* appearing in red. In addition to seeing the totals for all reservations, you can now also see these amounts for each individual reservation. Click the desired reservation and the *Res Total, Invoiced Total, Balance* and *Commission Total* for just that reservation appears to the right of the heading *Selected Reservation*. To hide these totals, click the *splitter* at the bottom of the screen.

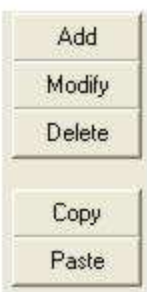
Res Card Tabs

The Res Card tabs are Reservations, Invoices, Activities, Agent Remarks, Client Feedback about Trip, Attachments, Multi Currency if using, More Fields, and Edit History.

Res Card Reservations Tab



The reservations tab is where all the reservation details for the trip are stored. Each Res Card or trip can have any number of reservation records. Every time there is a new vendor, there is a new reservation. The buttons to the right of the reservation screen enable you to add, modify or delete a reservation. To add a new trip reservation, click *Add*; to modify or enhance an existing trip reservation, click *Modify* while the reservation is highlighted; click *Delete* while the reservation is highlighted to remove it.



Copy an Entire Res Card from One Profile to Another

When copying an entire Res Card from one profile to another, all data captured within the Res Card, except for date created, invoices, activities, client feedback about trip, profile and traveler-related fields is copied, including all general trip level information, all reservation records and agent remarks.

To copy an entire Res Card, select the Res Card tab **in the profile**, highlight the Res Card to copy (do not open the Res Card) and click *Copy*. Next, close the profile, and retrieve or create the profile you want to copy to, select the Res Card tab, and click *Paste*.

The Paste button for Res Cards will be disabled unless a Res Card has been copied first.

Copy One Reservation Record from one Res Card to Another

When you copy one reservation record from one Res Card to another, all data captured within the reservation record, except for traveler related fields is copied, including vendor level information as well as service provider level Information. To copy a reservation record, retrieve the Res Card, select the reservation tab, highlight the reservation record and click

Copy. You can paste that reservation into that same res card, or close the Res Card, and retrieve or create the Res Card would like to copy to, select the reservations tab and click *Paste*.

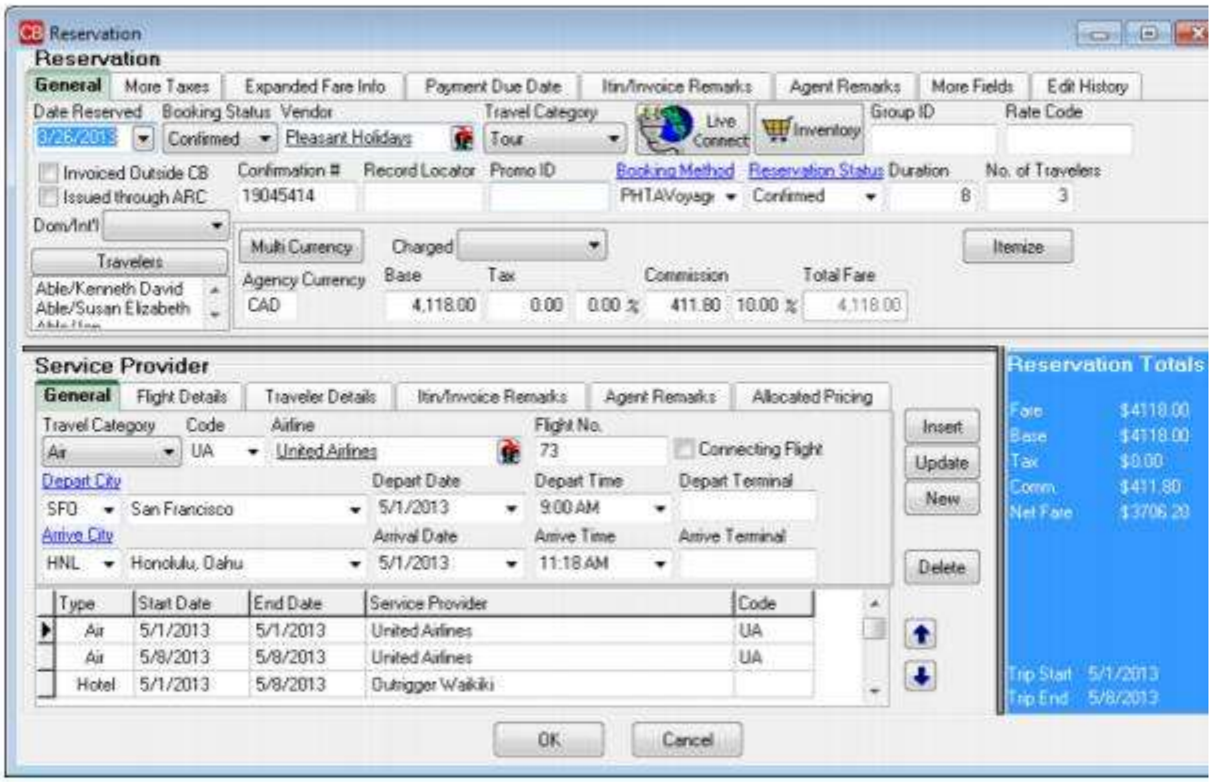
The Paste button for Reservations is disabled unless a Reservation has been copied first.

Add a New Reservation

There are four other ways (besides copying mentioned above) in *ClientBase* to add data to a Res Card including manual entry, Live Connect, Import from PNR, and Pull From Inventory. All methods are outlined below and begin by creating a new reservation by clicking *Add*.

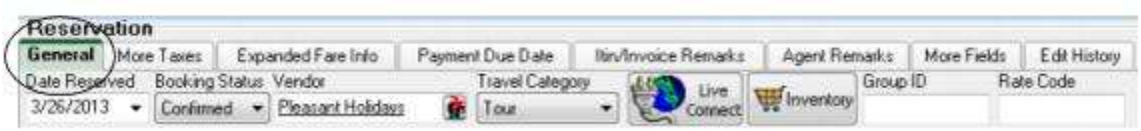
A reservation input screen is entered containing two sections - **Reservation** (top) and **Service Provider** (bottom). The **Reservation** section contains 8 tabs - *General* (to enter reservation details); *More Taxes* (to enter tax information); *Expanded Fare Info* (to enter markups/discounts you don't want broken out on the customer invoice, and for Fare Savings info to be collected in TBO); *Payment Due Date* (to enter deposit and final payment dates and create a reminder for each)*; Itin/Invoice Remarks* (to enter free-flowing itinerary/invoice remarks); *Agent Remarks* (to enter free-flowing agent remarks); *More Fields* (customizable fields designed to capture data that is unique to your agency's or clients' needs); and *Edit History* (provides you with a history of the changes users make to reservations).

Each of these tabs can be viewed from the 6 Service Provider tabs below (General, Itinerary, Traveler Details, Itin/Invoice Remarks, Agent Remarks, and Allocated Pricing).



Note: These folder names change depending on the type of reservation that is being entered.

RESERVATION GENERAL TAB (TOP)



The **General** Tab allows you to capture many of the reservation details. Although, you decide how many to complete, the only fields mandatory are Travel Category and Vendor Amounts.

Note: **Represent only mandatory fields in Reservation.

Date Reserved: Enter the date this booking is reserved. By clicking the down arrow, select a date by double-clicking the desired day from the calendar.

****Booking Status:** A drop-down list of *Confirmed, Cancelled* and *Quoted* are available choices. The Confirmation Status is not free-flow and cannot be left blank, as the entry selected has an impact on the reservation total included in the Res Card balances at the top of a Res Card. Reservations with a status of *Confirmed* increase the reservation total and can be invoiced and included on trip statements. **Reservations with a status of *Quoted* do not increase the reservation total, and cannot be invoiced and do not appear on trip statements, although can be included in all formats of the *Proposal* and *Itinerary*.** Reservations with a status of *Cancelled* do not increase the reservation total and cannot be invoiced nor do they appear on *Proposal, Itineraries* or *Trip Statements*.

****Vendor:** Enter the vendor for this booking by entering the first two or three letters of the vendor's name and then clicking the desired name from the drop-down menu. If the vendor is not in the menu, you receive a message, "No matching profiles." Create a vendor profile by going to **File|New|Vendor Profile** from File Menu Items at the top of your screen.

To go to the vendor profile from a reservation, click the *Go To Profile* button next to the vendor (it's the 2 heads with the red arrow icon to the right of the field), and the system moves you into the corresponding vendor profile for review. Easily access your vendor details such as phone numbers, key contacts, client remarks etc. Upon closing the vendor profile, the system returns you back to the reservation record.

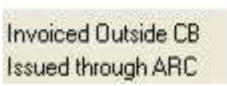
Note: You have ability to automatically launch the Live Connect screen when a vendor linked to a Live Connect provider is selected within a Res Card reservation. This feature can be enabled/ disabled by going to **Global Defaults|Res Card Defaults|Default Field Values for Res Cards|Reservations** and removing the check in the setting called *Automatically launch Live Connect for Live Connect Vendors.*

****Travel Category:** Enter the travel category for this booking by clicking the drop-down menu. This field automatically defaults by setting the default Travel Category within the vendor profile. If there is more than one Travel Category assigned to the vendor profile, the Travel Category defaults to the first Travel Category in the list for that vendor. If there is no Travel Category assigned to the vendor profile, the reservation defaults to the Travel Category of *Cruise*. (This field automatically creates a default Travel Type for this reservation that is used when invoicing to *Trams Back Office*.)

Live Connect: Click the *Live Connect* icon to access participating on-line booking engines. Save time and improve efficiency by passing selected client information to the booking engine, then electronically pass back reservation details and automatically complete the reservation form with what's been booked. Steps for using Live Connect are described in the chapter, *An In-Depth Look at Live Connect.*

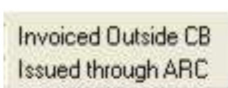
Inventory: Click the *Inventory* icon to connect to a database of inventory while working in the Res Card. To query inventory for a particular client's trip, create a res card for that client from the res card main screen, click *Inventory.* Or from the *Reservation Tab,* click *Add,* set the Travel Category, and click *Inventory*. A Level 2 Inventory Query screen appears to query your database of inventory based upon the travel needs of the client. For complete directions on creating and using inventory, please refer to the section *Creating and Using Inventory.*

Group ID/Rate Code: These fields can be used to track details of group cruise contracts. If these fields are completed on an inventory record, they will be populated on the reservation when an inventory record is pulled in. Users can also enter data in these fields manually. These fields have also been added to Res Card Reports and to the Res Card Level Two and Level Three Query filters.



Invoiced out of CB: If you use the PNR Import feature, there are certain cases where reservation data captured in *ClientBase* may have been invoiced outside, for example, invoiced through the GDS. So that these types of reservations are not invoiced twice in error (once out of *ClientBase*, then again in *ClientBase*), this checkbox updates the Res Card balances at the top accordingly. Res Card balances at the top of a Res Card remain the same unless a reservation exists that has been designated as *Invoiced out of CB+*. If a reservation exists with the designation of *Invoiced out of CB+,* then the Res Card balances reflect *Res Total, Invoiced in CB+, Invoiced out of CB+,* and *Balance*.

Set up default settings for this area in **Global Default|Default Field Values for Res Cards.** All new reservations imported using PNR Import have the *Invoiced outside of CB+* checked. Any reservations entered by hand or through Live Connect do not default to being checked, but in either case the default can be overwritten. Any reservations designated as *Invoiced out of CB+* do not appear as an option for invoicing through *ClientBase*, but can be included on the invoice summary as part of the *Prior Invoiced* totals. These reservations can also be included on all formats of the print itinerary feature.



Issued Through ARC: If you use the import PNR feature in *ClientBase* (see chapter on *An In-Depth Look at PNR Import*), you can capture ARC type transactions. Notice when this box is checked, how an airline field appears before the vendor field in the reservation header. When an air travel category is selected in the service provider portion of the reservation, a validating carrier, in addition to a vendor is captured and all pricing is captured within the traveler details tab, as pricing and ticket information is at the traveler level.

Dom/Int'l: Defaults to blank upon entering a new reservation, but allows you to select from a drop-down list including: *Domestic, International* or *TransBorder*. If you begin to capture this setting in your *ClientBase* Res Cards, then you are able to Query your database of Res Cards for reservations that have been classified as *Domestic, International* or *TransBorder*, as this field has been added as a filter to Level 2 and Level 3 Queries in Profile Manager and Level 2 Query in Res Card Manager.

Trams Back Office **Subscribers:** This field is captured within the *Trams Back Office* booking upon invoicing. Since the TBO invoice booking does not allow this field to be blank, if the field is left blank within the reservation record, the field defaults to *Domestic* in TBO upon invoicing.

Confirmation #: Enter the confirmation number for this booking.

Record Locator: Enter a record locator number if available.

Promo ID: This field is freeflow and can be used to capture a specific product or promotional code for this reservation. This field can also be passed to an on-line booking engine as it has also been added to the Live Connect selection screen for including in the post of information sent to an on-line booking site.

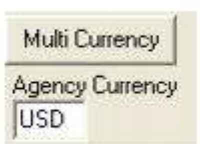
Booking Method: Enter the method of the booking from the drop-down menu. Customize the default list for the user-defined *Booking Method* field by going to **Global Defaults|General Setup|User Defined Fields**, or by clicking on the blue field label if permitted. This area is automatically populated when importing a Live Connect booking.

Reservation Status: Enter the status of this booking from the user-definable drop-down menu. By keeping this field updated, reports can be run for reservations marked with each status.

Duration: Enter number of nights of trip.

No. of PAX: Enter number of travelers for this trip.

Travelers: Click to choose from the traveler list any traveler for whom this reservation applies. View selected travelers below field when completed. **Important:** When entering an airline reservation, by clicking on this area, you can enter ticket, traveler pricing, and other misc. airline details.



HANDLING MULTIPLE CURRENCIES

When handling multiple currencies, reservations can be tracked in the agency's currency or reservations can be tracked in the foreign (vendor) currency. The setting *By Default Track Res Card Balances In*" under **Global Defaults|Res Card Defaults|Currency Setup** can be setup as the default. This is simply a default and can be overridden per Res Card.

A *Multi Currency* tab added to the Res Card also contains this *Track Res Card Balances In* setting in order to update Res Card balances on a one-by-one basis.

(All multi currency Res Card balances entered prior to version 3.6 will remain in the Agency Currency unless modified individually.) New reservations with multiple currencies are also tracked in Agency Currency until the setting is changed in Global Defaults or the setting is changed per Res Card under the Multi Currency tab.

Although Res Card balance tracking can be changed from Agency Currency to Foreign Currency and vice versa, change will only occur if Res Card is not invoiced. If the Res Card is already invoiced, this setting under the *Multi Currency* tab is disabled. If changing from Agency Currency to Foreign Currency, the system checks to see if the record contains Markup/Discounts and if so prompts, *Markup/Discounts exist and are not supported when balances are tracked in the Foreign Currency. Continuing will clear any Markup/Discounts entered. Continue? Yes/No*."

When tracking Res Card balances in Foreign Currency, itemization can now be captured. Itemization is captured in the reservation's currency. If itemization is captured and user changes the selected currency, user is prompted *Changing the Reservation Currency will clear all Itemization details. Do you want to continue? Yes/No.* Since itemization cannot be captured when Res Card balances are tracked in Agency Currency, if changing Res Card from Foreign Currency to Agency Currency the system checks to see if Itemization exists and if so prompts *Itemization exists. Currency cannot be converted at the itemization level. Continuing will clear all itemization details. Continue? Yes/No.*

If agency chooses to continue to track reservation totals in the agency's currency, an invoice setting gives the options of showing traveler pricing for each reservation in Agency, Vendor and/or Client currency on an invoice. Select **Utilities|Branch** and then click *Format Settings* under Invoice Settings. A Multi-Currency section is available for selection with the options of *Show Agency Currency, Show Vendor Currency and Show Client Currency*. All three or any combination of these settings may be selected; therefore, check the box or boxes of the currencies that should appear for pricing on an invoice. These settings are only used when Track Res Card Balances is set to Agency Currency.

Example: An agency located in Canada booked a cruise with a US vendor. In the Multiple Currency screen the Vendor currency was entered as $1500 US dollars. The Agency Currency was entered as $1400 Canadian dollars. If the *Show Agency Currency* option was checked, only the Canadian dollars appear under pricing when the invoice is generated. If both *Show Agency Currency* and *Show Vendor Currency* options were checked, pricing appears in both Canadian dollars and US dollars. If the client paid for the reservation in a different currency (i.e. Euros) and that amount was entered as the Client Currency on the Multiple Currency screen and all three options where checked, pricing would appear in all three currencies.

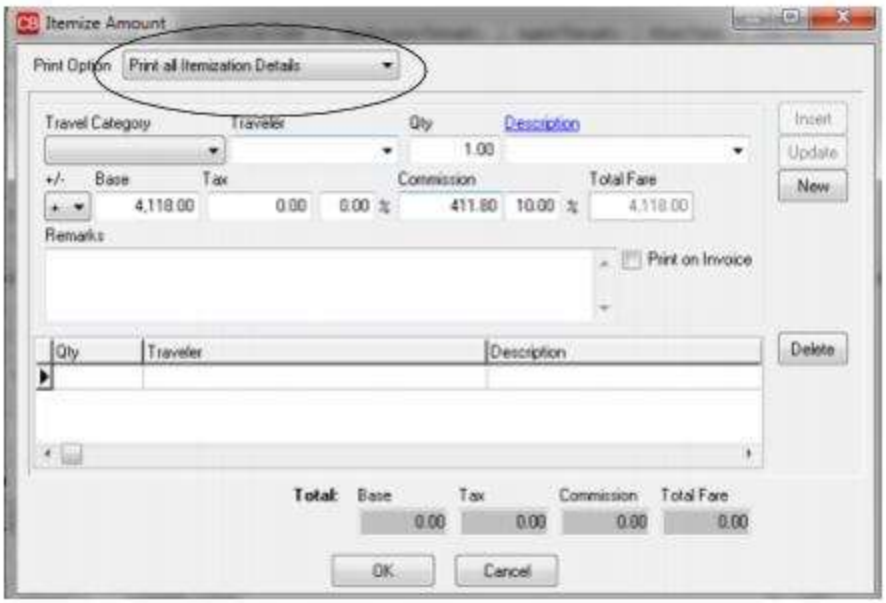
If agency chooses to track reservation totals in the foreign currency, when tracking balances in Foreign currency there is no longer a Multi Currency screen. Each reservation is entered in the currency it was booked in by clicking the Currency drop-down and selecting the correct currency code. Once the currency code is chosen the currency rate is displayed. Currency rates are based on the Currency Setup in Global Defaults but can be changed at the time of booking if needed. However, if ARC/BSP is checked, the currency must remain in the agency's currency and the Currency field is disabled.

For each reservation, the Reservation Totals summary on the right side of the screen shows the currency code for all foreign currency bookings. The Res Card totals in the Res Card Header will summarize all balances with one line per currency. The first two currencies are displayed; however, if more lines exist, click the button next to the Res Card header to view all. Reservation totals at the bottom of the Res Card show the balance of the Selected Reservation in the currency it was booked along with the Currency Code. The balances displayed for All Confirmed Reservations summarize all reservations booked in the agency's currency. Click the button next to the Reservation totals at the bottom of the Res Card to view all Reservation totals.

Invoicing Multi Currency: On the invoicing screen, each reservation appears in the currency the reservation was booked in along with the conversion rate. Conversion rate can be changed if needed. When printing all invoices, each reservation appears on the invoice in the currency it was booked in. All reservations are then totaled per currency and appear at the bottom of the invoice, one box of totals per currency. Client payments are printed on the invoice in the reservation's currency. If agency also uses *Trams Back Office* software, client credit card payments are saved in TBO in the agency's currency. Client payments entered as CC Merchant, Debit Card, Check and Cash payments are not saved in TBO and need to be handled in the back office by the bookkeeper.

ITEMIZE PRICING

Click the *Itemize* button to bring up a screen to itemize the total fare among travelers.



Note: If you itemize, make sure the total of each entry equals exactly the total fare. The field length of the Description field within Itemization is 100 characters. Check *Print on Invoice* by the Remarks area of Itemization to print the Remarks for your customer. Any itemized amount that has commission only will not appear on invoices and itineraries.

Print Option: By clicking on the drop-down at the top of the itemization screen, change the default of how the itemization for this particular reservation is sorted and printed on a customer invoice:

- Print all Itemization Details
- Summarize by Traveler - (lists totals by traveler)
- Summarize by Category/Traveler (lists each traveler as a column broken down by Travel Category)
- Summarize by Description/Traveler (lists each traveler as a column broken down by Description)
- Do not Print Itemization (allows you to itemize for your internal records but doesn't print on the invoice)

Default settings for this area can be set up in **Global Default|Default Field Values for Res Cards**.

Travel Category: This field is not mandatory when entering itemized amounts, nor does it print on the invoice. (If insurance is captured as part of the itemization, then the insurance waiver prompting at time of invoice does not appear. Insurance waiver prompting now looks for a reservation, service provider or itemization record with a travel category of insurance to determine if the prompt should appear or not. Insurance waiver prompting is established under Global Defaults.)

After filling in the fields to break out itemized totals, *Insert* updates the data screen below with the new traveler information; *Update* modifies the data screen below with updated traveler information; *Delete* eliminates a highlighted entry, and *New* provides blank data entry fields for entering free-flow new traveler information. Make sure you see data entries listed correctly in the entry screen below before clicking *OK* to save.

**Represent the only mandatory fields in a Reservation.

The default *City Code* table, used within the *ClientBase* Res Card reservations, is a user defined drop-down table that can be edited by the user. To update the city codes that *ClientBase* comes defaulted with, either go to **Global Defaults|General Setup|User Defined Fields** or click the blue field link for city within a Res Card reservation record. The city codes include a 3 character code, City, State/Country and Domestic/International designator. Add, modify and delete within this list directly from *ClientBase*.

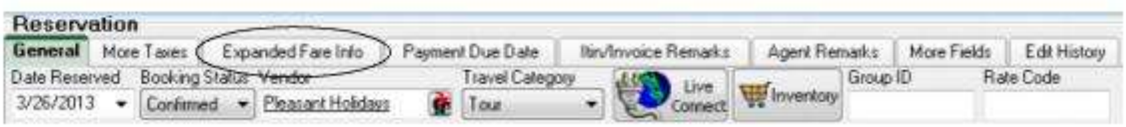
MORE TAXES TAB (TOP OF RESERVATION)

Designate which taxes go to which tax fields when invoicing from *ClientBase*. Tax defaults for up to 4 taxes, may be setup under **Global Defaults|Res Card Defaults|Tax and Commission**. If desired, for each tax field, specify the two-letter tax Identifiers of the taxes. If you have more than one Tax ID, separate them by a comma. The commission rate for vendors used in reservations is defaulting to the vendor commission field in the *Trams Back Office* vendor profile. If the vendor default commission in *Trams Back Office* is blank, then the commission defaults to the amount entered in the field called *Comm Rate* under **Global Defaults|Res Card Defaults|Tax and Commission**.

When you enter the amount of tax for the reservation and have not used the tax table, the total amount of the tax appears in the Tax 1 Field in the More Taxes tab. If you want to separate the taxes, use the More Taxes table and enter the amount of each separate tax by using the tax fields. The grand total of each tax entered appears in the tax field in the reservation header.

There is a checkbox *Print Plus Applicable Taxes* only visible if the Tax total for the reservation is zero. If this new setting is checked and if *Amount Details* captured within the Reservation (per xx pricing is checked), then upon printing the Amount Details on the Proposal/Invoice/Itinerary (Plus Applicable Taxes) appear after the pricing. This setting can assist with hotel or car type reservations where the exact tax amount charged upon check-in is not known, yet you want to let the customer aware of the fact that there could be additional taxes.

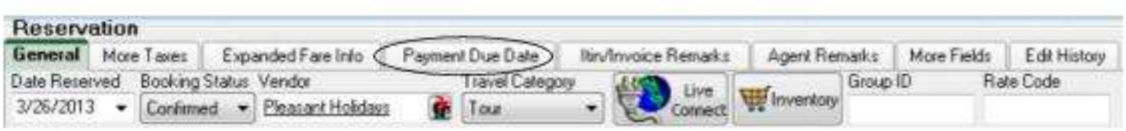
EXPANDED FARE INFO TAB (TOP OF RESERVATION)



Fare Savings Information: For back office reporting purposes, you can capture fare savings information for each *ClientBase* reservation, including *High Fare, Low Fare* and *Fare Code*. These fields are captured in the *Trams Back Office* fields upon invoicing for client reporting purposes.

Markup/Discount Information: For markups and discounts that you do not want broken out on the client invoice or vendor statement, you can capture a client *Markup*, which adds to the reservation totals, or a *Discount*, which subtracts from the reservation totals. If a Markup or Discount amount is entered then a new field is displayed within the Reservation totals called *After Markup* or *After Discount* depending on which is selected. If a markup or discount amount is captured, the *Face Value* field is automatically calculated in *Trams Back Office* upon invoicing. **Note:** If you do want the discount or markup broken out on the client invoice, then use the *Itemize* area of the reservation pricing rather than the *Markup/Discount* fields in this area.

RESERVATION PAYMENT DUE DATE TAB (TOP OF RESERVATION)



The Payment Due Date Tab contains the following entry fields:

Deposit Due Date: Enter the date the deposit is due. By clicking the down arrow, select a date by double-clicking the desired day from the calendar, or free-flow the date.

Final Deposit Due Date: Enter the date the final deposit is due. By clicking the down arrow, select a date by double-clicking the desired day from the calendar, or free-flow the date. **Note:** If you want to print a Final Payment report, this is the field that report picks up.

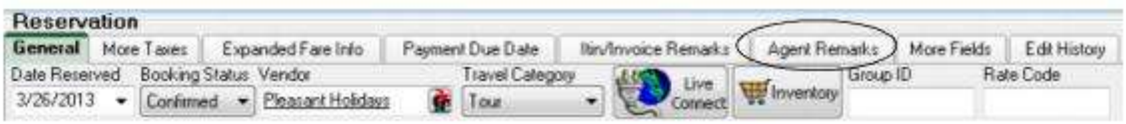
Deposit Amount/Form of Payment/Check/CC #: If a deposit is paid via Live Connect, these fields are populated as part of the Live Connect import, or they can be captured by hand. If these fields are completed via Live Connect or by manual input, upon invoicing the reservation for the first time, the invoice amount defaults to the *Deposit Amount* and the *Form of Payment* defaults to the *Form of Payment* captured in this *Payment Due Date* tab.

Create a Reminder: To create a reminder which appears on the user's daily to-do list, click *Create a Reminder* and fill in the appropriate details. The reminders are automatically created; one for *Deposit Due Date* and one for *Final Payment Due Date*. These reminders also appear in the Res Card's *Activities* tab, as well as in the client's profile folder, *Activities*.

RESERVATION ITIN/INVOICE TAB (TOP OF RESERVATION)

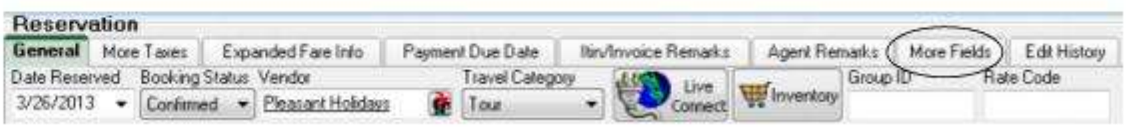
Enter free-flowing proposal/itinerary/invoice remarks that appear on the itinerary and invoice directly under the vendor information. These remarks go to *Trams Back Office*.

RESERVATION AGENT REMARKS TAB (TOP OF RESERVATION)



Enter unlimited free-flowing agent remarks for personal agent reference. These do not print anywhere.

RESERVATION MORE FIELDS TAB (TOP OF RESERVATION)



The More Fields tab and its entries provide your agency with customizable fields designed to capture data that is unique to your agency's or clients' needs. By including More Fields at the Reservation level, you have the ability to capture a More Field entry for just a specific Reservation within a Res Card without applying it to the entire Res Card.

Also, since More Field entries can be linked to a TBO UDID, having Reservation level More Fields provide more flexibility around including specific UDID's only on certain Invoice Bookings. Upon invoicing, if a Reservation level More Field is linked to a UDID, then the UDID is captured only on that specific Reservation Booking in TBO.

A Res Card level More Field, when linked to a UDID, continues to populate all TBO Invoice Booking UDID fields. Upon invoicing, if the same More Field has an entry at the Reservation level and Res Card level, then the Reservation level overrides the Res Card level and the TBO UDID captures the Reservation level More Field entry.

These Res Card level print settings can be checked by default by going to **Global Defaults|Res Card Defaults|Default Field Values for Res Cards** and clicking on the Res Card More Fields tab. By default each More Field category is set to not print, but in addition to changing the Global Defaults, these print defaults can also be changed per Res Card and Reservation. If a More Field is set to print, any Res Card level entries print at bottom of the Invoice totals above Branch, Client and Agent Remarks and any Reservation level entries print at the bottom of Reservation details and above Itin/Invoice Remarks and Vendor Remarks.

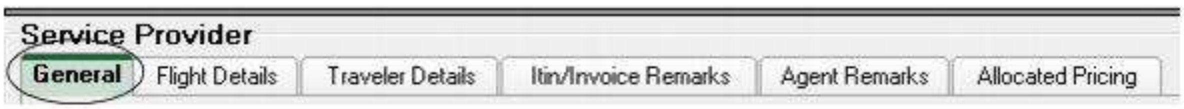
NOTE Res Card More Field Usage : When More Fields are created, the same More Fields can be used either at the Res Card Level or at the Reservation Level. When a More Field value is entered at the Res Card Level, that value carries over into each of the invoice bookings. A unique More Field value can be made for a specific reservation; however, by going into the More Field tab inside the reservation.

EDIT HISTORY TAB (TOP OF RESERVATION)

This area provides you with a history of the changes users make to reservations, and a place to view that history if there is a question as to how something got added or modified. The Edit History log includes the *User, Date/Time, Field Name, Old Entry, New Entry* and the ability to print the Edit History as a report.

Fields the Edit History tracks at the Reservation Level: Date Reserved, Booking Status, Vendor, Confirmation #, Travelers, Base, Tax, Commission, Duration, # of Pax, No of Cabins, Deposit Due Date, Final Payment Due Date, and Reservation Pay Information.

SERVICE PROVIDER, GENERAL TAB (BOTTOM OF RESERVATION)



The **Service Provider** area of a reservation record is completely optional (when using the Live Connect option, these fields are populated). Information entered here appears on itineraries and invoices generated for this reservation and can be used for reporting purposes. One reservation record can have one or more service providers. For example, a Disney Cruise reservation record can include just one service provider, Disney Cruise Lines, or perhaps more than one, the Disney Magic and the Contemporary Resort. The amount of detail to capture is up to you.

The **Service Provider** section of the screen has up to 7 tabs depending on the selected Travel Category: **General** (to enter service provider information); **Address** (this area is filled in automatically if the vendor profile has this information in it; otherwise enter free-flow information); **Itinerary** (appears where individual segments are entered), **Traveler Details** (where individual traveler details are entered), **Itinerary/Invoice Remarks** (enter free-flowing itinerary/invoice remarks for the service provider); **Agent Remarks** (enter unlimited free-flowing agent remarks); and *Allocated Pricing* (costs for each service provider can be itemized but does not print on any client reports). By default the dollar amounts fall in the first service provider allocated pricing area. If you would like a break-down of all service providers in the reservation, you must manually enter details into the allocated pricing area for each service provider. These allocated pricing fields are picked up in the Res Card *Service Provider Activity Report*.

Depending on the selected travel category, the service provider section, General Tab, contains the following entry fields:

Travel Category: Enter the travel category (setup in *Trams Back Office* if you have this program, or in the Global Defaults) from the drop-down menu. Different data entry fields appear for each travel category. Examples are:

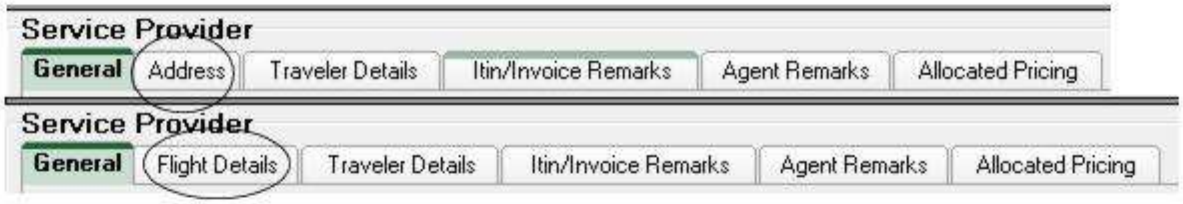
For Air, a separate service provider record may be completed for each segment or leg in the itinerary - with numerous fields available such as *Check-In times, Departure Terminals, Equipment, Meal Service, Duration, Mileage*, etc. For Hotel, entry fields include *Property, Room Type, Check In and Out Dates, Room Description, and Smoking*. Car entry fields include *Car Company, Start Date, End Date, Car Category, Pick-Up Time, Drop-Off Time, and Car Description*. Cruise entry fields include *Ship, Start Date, End Date, Category, Deck, Cabin/Room, Dining, and Smoking*.

Depending on the other selected categories, appropriate travel category entry fields appear.

Service Provider Name: If you have set up your Global Defaults to do so, by default when you put in the vendor at the top of the reservation, it drops into the service provider name field. Enter a few letters of the service provider to Query for its profile. For example, you may have entered Carnival Cruise Lines as the vendor, but want to show Ecstasy as the ship or Service Provider, the product that the vendor is selling. (You can also free-flow into this field, if this has been enabled.)

If a reservation Service Provider record is linked to a Service Provider profile, then the *Go To Profile* button next to the Service Provider (it's the 2 heads with the red arrow icon to the right of the field) takes you to the Service Provider profile. If the Service Provider entry was completed via free flow entry (vs. clicking the down arrow and selecting from the list of existing Vendor/Service Provider profiles), clicking the *Go To Profile* button will not navigate you anywhere.

SERVICE PROVIDER, ADDRESS/FLIGHT DETAILS TAB (BOTTOM OF RESERVATION)



Car, insurance, miscellaneous, tour and transportation travel categories default the *Print on Itin/Invoice* box to being unchecked, but can be added if you want addresses to print on the itinerary or the invoice. To change these default settings for new reservations go to **Global Defaults|Res Card Defaults|Default Field Values for Res Cards**, click Reservation tab and either place a check or remove the check from the *Print Address on Itin/Invoice* for the corresponding Travel Category. *Flight Details* would appear on an air Service Provider entry.

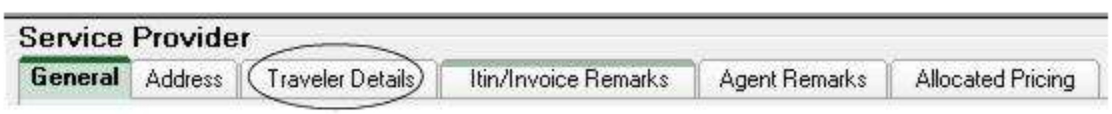
SERVICE PROVIDER, ITINERARY TAB (BOTTOM OF RESERVATION)

Click *Itinerary* (if it appears after the travel category has been selected) to enter the details of the trip which are printed on the customer's itinerary. Depending on the travel category selected under the General Tab, the appropriate data input screen appears. The example below is for air itinerary information. Click *Insert*, *Update,* or *New*.

Note: If you have selected *Cruise* as the Travel Type, there appears *Print Options* including two formats: *Do Not Sort/List Depart then Arrive* and *Sort by Date/List Arrive then Depart*. *Do Not Sort/List Depart then Arrive* prints the Cruise Itinerary as it has in the past versions of *ClientBase*. The *Sort by Date/List Arrive then Depart* provides the format that conforms to the more traditional way cruise itineraries are printed.

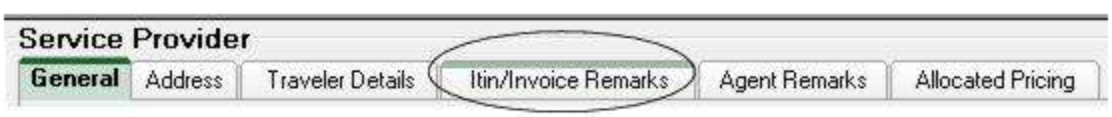
To change this default format for new reservations, go to **Global Defaults|Res Card Defaults|Default Field Values for Res Cards**, click the Reservation tab and set the Print Cruise Itin Option accordingly. The default can be tailored on a reservation-by-reservation basis to whatever format is desired for that cruise itinerary by changing it on the drop-down menu.

SERVICE PROVIDER, TRAVELER DETAILS TAB (BOTTOM OF RESERVATION)



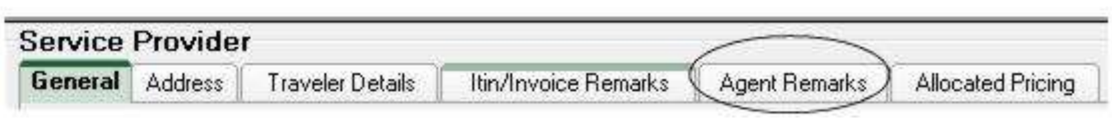
Click *Traveler* to choose from the traveler list any traveler for whom this portion of reservation applies. View selected travelers below field when completed.

SERVICE PROVIDER, ITIN/INVOICE REMARKS TAB (BOTTOM OF RESERVATION)



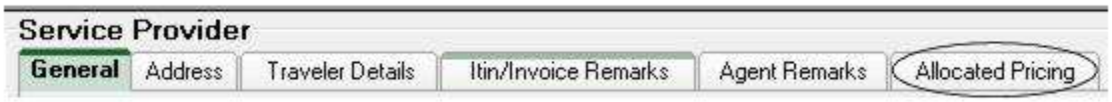
Enter any free-flowing remarks to appear directly below the service provider entry on the printed Itinerary and/or invoice.

SERVICE PROVIDER, AGENT REMARKS TAB (BOTTOM OF RESERVATION)



Enter any unlimited free-flowing agent remarks to appear about this service provider.

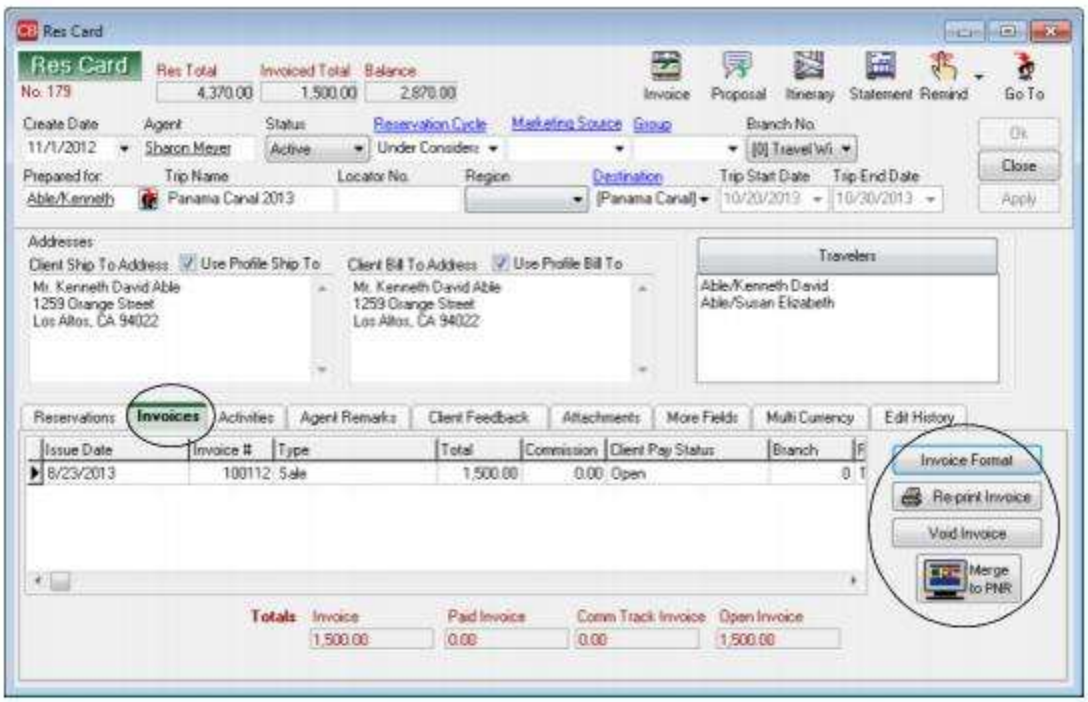
SERVICE PROVIDER, ALLOCATED PRICING TAB (BOTTOM OF RESERVATION)



Enter Total Fare, Base, Tax (%), and Commission (%) into these fields to keep for your own reference. (By default the dollar amounts fall in the first service provider allocated pricing area. If you would like a break-down of all service providers in the reservation, you must manually enter details into the allocated pricing area for each service provider. These allocated pricing fields are picked up in the Res Card Service Provider Activity Report.)

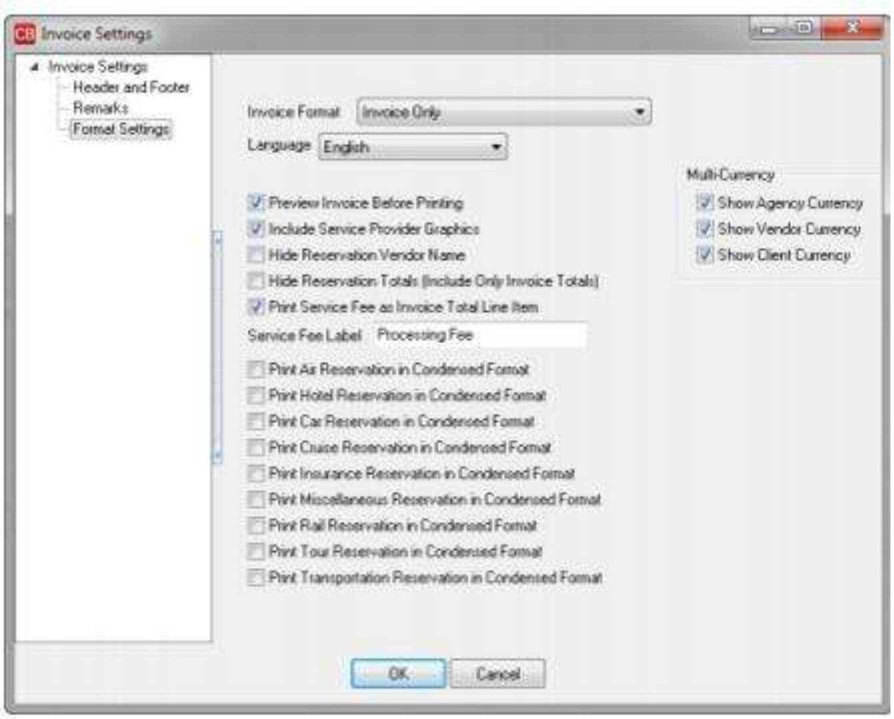
Once all tabs of a service provider record have been completed, click *Insert* to insert the information into the service provider grid below. To enter additional service provider records, click *New*, then enter the details and click *Insert* to insert the record into the service provider grid. To modify a record already in the grid, highlight the record, make any changes, then click *Update* to update the record. To delete a service provider record, highlight the record and click *Delete*.

Res Card Invoices Tab (Main Res card Screen)



The invoice tab of a Res Card is the area to review what has been invoiced to date for this trip. A complete summary of each invoice totals is displayed at bottom of screen.

Invoice Format: The *Invoice Format* button displays defaults that have been set up by the database administrator. For a list of functionality for these options, see the *Generate Invoice* section below.



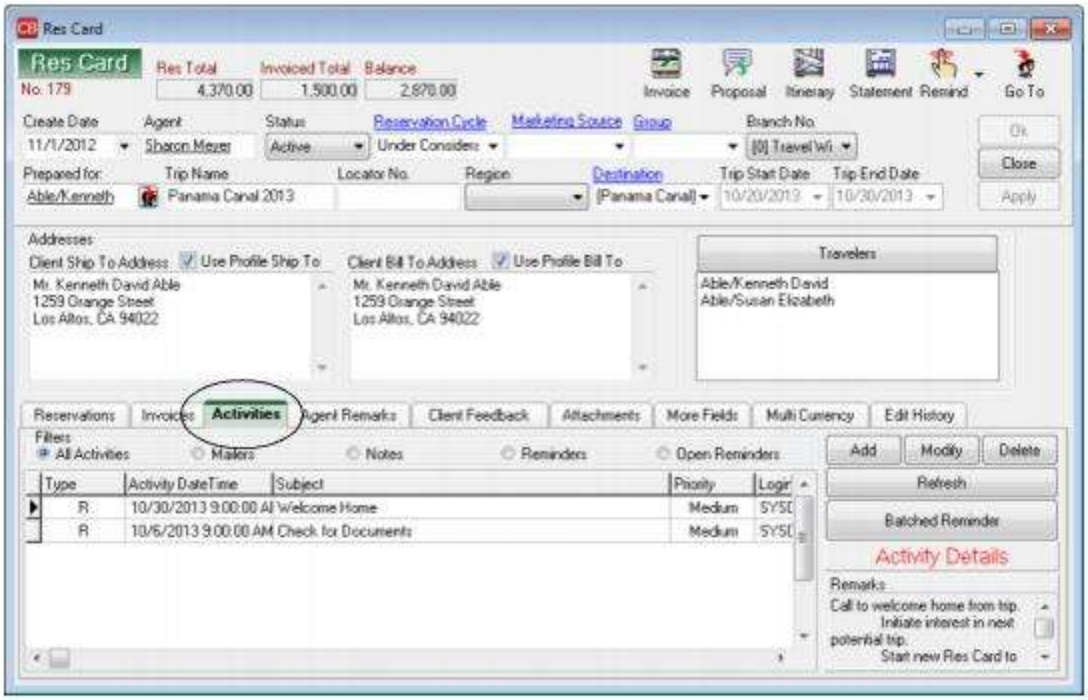
Reprint Invoice: Reprint any invoice by clicking *Re-print Invoice*. (*See Generate An Invoice* section below.)

Void Invoice: If you have been granted permission to void an invoice, select the desired invoice to void and click *Void*. You are prompted with a message *Track voided Invoice?* and given three options: *Yes* - voids the invoice but leave a history of the voided invoice within the Invoice tab; *No* - voids and deletes the invoice; *Cancel* - cancels the voiding process. (For more details please see *Generate An Invoice* section below.)

Merge to PNR: Agencies NOT using *Trams Back Office* can print invoices from *ClientBase*, and then send the invoice data to a PNR in the form of accounting lines so that it can be interfaced to their back office accounting system. In order to take advantage of this feature, *Merge to PNR Rules* need to be setup using the *Rescard Invoice* field group following the directions outlined in the section below, *Format Res Card Invoice Data to Send Data to PNR.* See also directions outlined in section below, *Using the Merge to PNR at Res Card Invoice Level.*

Note: Do not pass Res Card invoice data into a PNR for future invoicing if you have *Trams Back Office* as your back office system.

Res Card Activities Tab (Main Res Card Screen)

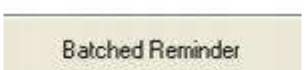


To create a note, reminder, or mailer for a trip, click the *Activities* tab. Entering the folder, see a summary of all notes, reminders, and mailers created for a customer's trip. A *Note* documents any contact you had with a client about the trip such as a phone call or e-mail. You can also document a quote you have given a client. A *Reminder* creates an entry, such as a new trip inquiry follow-up or a final payment phone call. This entry also appears on the user's daily *To-Do List* in the Activity Manager and in the *Activity* folder in client's profile. *Mailers* are like entries in a marketing "log." They are a historical record that is created automatically whenever a label, document template, e-mail or mail merge file is created for a client or group of clients.

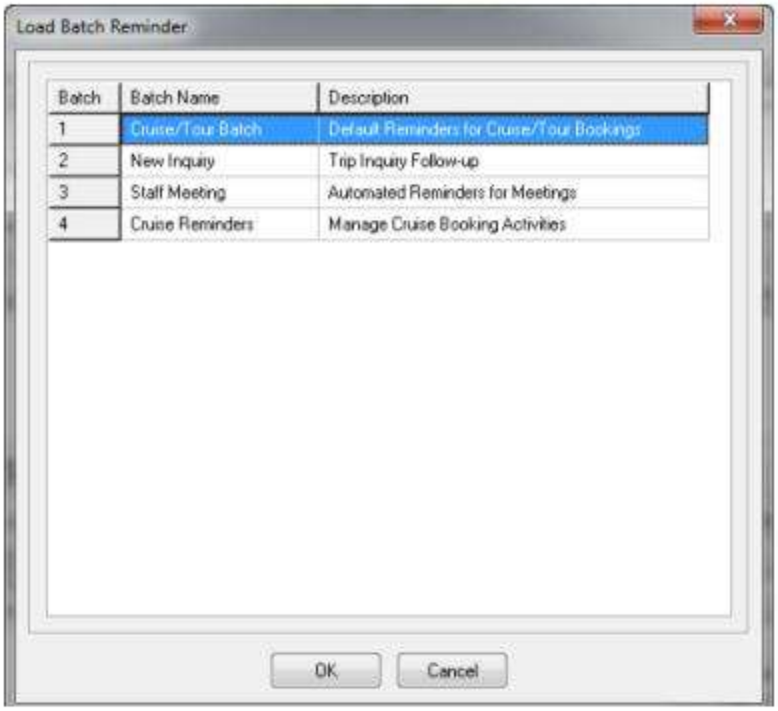
To add a new *Note|Reminder|Mailer*, click *Add*. To modify or enhance an existing *Note|Reminder|Mailer*, click *Modify* while the *Note|Reminder|Mailer* is highlighted. Click *Delete* while the *Note|Reminder|Mailer* is highlighted to remove it. Click *Refresh* to renew the display after you have added, modified, or deleted an entry. By clicking *Batch Reminder*, add any reminder batch created in *Global Defaults.* This allows you to add multiple reminders at one time to a reservation.

Note: Any activity added here can also be seen in the client profile under the *Activities Tab.*

LAUNCHING BATCH REMINDERS



You do not need to add individual reminders for a trip if you have setup a Batch of Reminders in Global Defaults. Create multiple reminders all at one time by following these steps:



1) From the Res Card, click *Batched Reminders* located at the top right corner of the Res Card, or in the activity tab click *Batch Reminders* to get a listing of the batch reminders which were setup under Global Defaults.

2) Select the batch to use for this Res Card by double-clicking the desired batch, or highlighting batch and clicking *OK*.

3) A listing of all of the default reminders included within the selected batch appears with the date of reminder defaulting based upon the merge field used. (If any of the Reminders in the listing do not have a current *Date of Reminder*, then the merge field used when setting up was left blank within the current Res Card. In order for these reminders to be created you must double-click the specific reminder within the listing and enter the date by hand.)

From this listing *Add*, *Modify* or *Delete* any of the default Reminders. Check each of the reminders within the listing to make sure the defaults are all correct. To change any of the defaults, simply highlight the reminder, click *Modify* and change the fields accordingly. Delete any reminders you do not want created for this particular Res Card, or simply uncheck its box.

4) When all reminders in the listing meet your needs, click *Create Reminders* and they are created at one time, and saved within the activities tab.

Res Card Agent Remarks Tab (Main Res Card Screen)

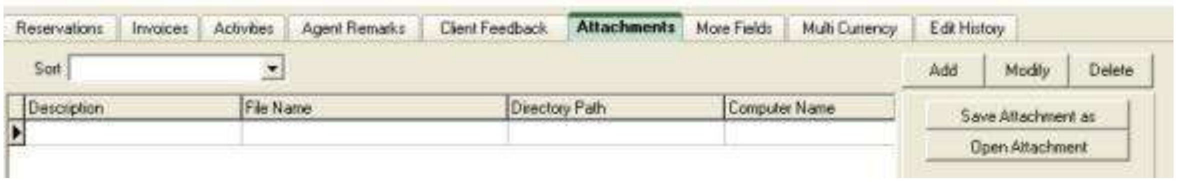
To enter unlimited free-flowing agent comments about this trip, click the agent remarks tab. These do not print on any documentation and are backed up every night. No need to write down notations on a notepad. Whenever you come into the res card, your notes about the trip are right here for you or anyone else to view.

Res Card Client Feedback about Trip Tab (Main res card screen)

After the customer returns from the trip, enter unlimited, free-flowing client feedback comments in the *Client Feedback About Trip* tab.

Attachments Tab (Main Res Card Screen)

To enhance the amount and type of information accessible in a *ClientBase* res card, clicking *Attachments* allows you to point to other files available on local or network drives. To add a new attachment, click *Add*, and *Browse for Attachment* to identity the File Path of the file. The File Path includes the drive where the file is located, any directories or sub-directories, and the name of the file. Choose to compress the file by clicking in the compression box. Enter a brief description of the attachment, if desired. When retrieving a res card and viewing attachments, sort by *Description, File Name, Directory Path, Computer Name, Original File Size, Compressed Size, File Date/Time,* or *Modified Date/Time.*



Note: Although these file paths are created from one workstation, they are saved as part of the *ClientBase* database and so accessible from any *ClientBase* workstation.

To view a saved Attachment, highlight the attachment, and click *Open Attachment* or double-click on the attachment. *ClientBase* uses Windows association to view the file type, load the appropriate software, and retrieve the specified file. Every file has an extension (e.g., .doc, .jpg, .bmp, .html, etc.) must be associated with a specific Windows software program such as MS Word, Paint Shop Pro, Internet Explorer, etc. to be viewed. Although this association is created automatically by Windows when various software programs are installed, if a workstation does not have a software program associated with the type of file an attachment is pointing to, then the file cannot be viewed from the attachment created in *ClientBase*.

Modifications to a file launched from *ClientBase* attachments can be saved automatically back into *ClientBase*. If an attachment is opened and then modified and saved, upon closing the attachment you land on the attachment settings window. Clicking *OK* from this area saves the newly modified file back to *ClientBase*. Click *Delete*, while the name is highlighted, to remove an attachment. *Save As Attachment* allows you to save a copy of the attachment into another file location.

More Fields Tab (Main Res Card Screen)

Enter a value into any of the established More Fields under this tab. Use the drop-down arrow to select from a list of default values or free flow an entry into any of the fields. For any new Res Cards you create, if the Res Card more field has a link to a profile more field, then that more field is completed automatically if the Profile more field has been completed. The default can be overwritten if desired. If the Res Card more field has a link to a *Trams Back Office* UDID (User Definable Interface Data), then upon invoicing, any entry stored in the *ClientBase* Res Card more field lands in the TBO UDID field within each booking.

When More Fields are created, the same More Fields can be used either at the Res Card Level or at the Reservation Level. Go to **Global Defaults|Res Card Defaults|Res Card More Fields Categories** and *Add.* Link the More Field to a UDID. The More Field can either be filled in manually in the Res Card or Reservation, or by selecting a drop-down item that has been set up in **Global Defaults|User Defined Fields|Res Card More Field Items**.

When a More Field value is entered at the Res Card Level, that value carries over into each of the invoice bookings. A unique More Field value can be made for a specific reservation; however, by going into the More Field tab inside the reservation.

Multiple Currency (Main Res card Screen)

Enter from drop-down how you want res card balances to be tracked (this overrides the settings in Global Defaults):

Foreign Currency - New reservations are always captured in the currency the transaction was booked in.

Agency Currency - New reservations are always captured in the currency of the agency location.

Edit History (Main res card Screen)

This tab provides a detailed log of any changes made to the data stored in designated fields. This provides you with a history of the changes users make to Res Cards, and a place to view that history if there is a question as to how something got added or modified. The Edit History log includes the *User, Date/Time, Field Name, Old Entry, New Entry* and the ability to print the Edit History as a report.

Fields the Edit History tracks at the Res Card Level: *Create Date, Agent, Status, Res Cycle, Marketing Source, Group, Branch, Trip Start/End Date*, and *Travelers*.

Invoicing in ClientBase

Generating an Invoice - Setup

Before generating an invoice in *ClientBase*, some setup is required. Make sure to refer to appropriate area under **Global Defaults** or **Utilities|Branch** in the chapter, *Setting Up ClientBase for Your Agency,* for **FULL DETAILS** on each step. Here is a checklist to go by:

___1) Setup Invoice and Refund Beginning Number in Branches by going to **Utilities|Branch.**

___2) Setup Headers/Footers, Unlimited Remarks, and Default Formats for Invoices, Trip Proposals, Trip Itineraries, Trip Statements and Receipts for each Branch by going to **Utilities|Branch.**

Suggestion: To print agency letterhead automatically for Trip Proposals, Itineraries, Invoices, Trip Statements, and Receipts, go to **Global Defaults|General Setup|Header and Footer** and setup company headers/footers using Merge Fields from the drop-down menus. But if you have different branch logos, you need to load these in **Utilities|Branch.**

___3) Track vendor currency and client currency in addition to your agency currency by setting up the multi-currency feature in *ClientBase*. Go to **Global Defaults|Res Card Defaults|Currency Setup**:

___4) Setup Res Card defaults by going to **Global Defaults|Res Card Defaults|Default Field Values for ResCards**.

___5) Setup Res Card More Fields by going to **Global Defaults|Res Card Defaults|More Field Categories**.

___6) To ensure that travel insurance protection is offered to every customer and either accepted or declined, setup *Res Card Insurance Prompting*. Go to **Global Defaults|Res Card Defaults| Insurance Prompting**:

___7) Setup a default service fee vendor and default service fee amount to use in creating a service fee reservation in your Res Cards by going to **Global Defaults|Res Card Defaults|Service Fee.**

___8) If not a TBO user, setup Tax and Commission Invoice Defaults by going to **Global Defaults|Res Card Defaults|Tax and Commission Defaults**.

___9) Go to **Global Defaults|Res Card Defaults|Default Field Values for Invoices.**

___10) Setup Batched Reminders by going to **Global Defaults|Res Card Defaults|Batched Reminders.**

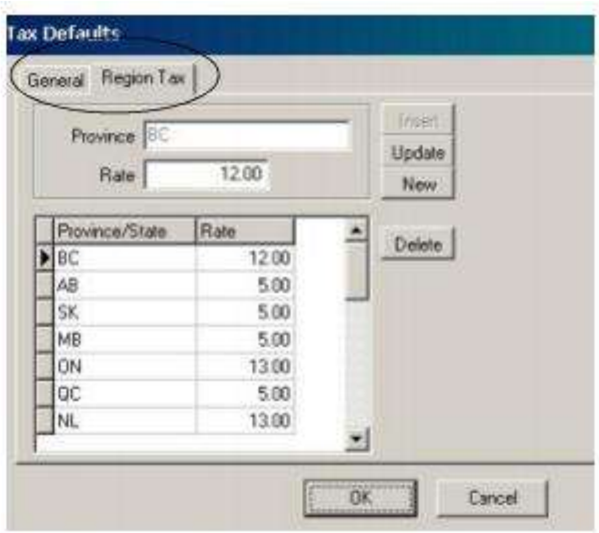
___11) Setup Required Fields for Res Cards by going to **Global Defaults|General Setup|Required Fields|ResCard Fields**.

Canadian Agencies GST/HST Setup/Workflow

Setup to use GST/HST Tax:

1) The Tax and Commission Default settings found under **Global Defaults|Res Card Defaults** provides an area in the General Tab to put all tax rates including GST/HST if not already setup in TBO. Specify the two-letter tax Identifiers of the taxes. For more than one Tax ID, separate taxes by a comma.

The Region Tax tab is designed to capture default tax rates by Province. All 14 Canadian Provinces are included within this table along with a default tax rate. These Provinces and Tax rate defaults can be updated using the *Insert, Update* and *New* buttons.

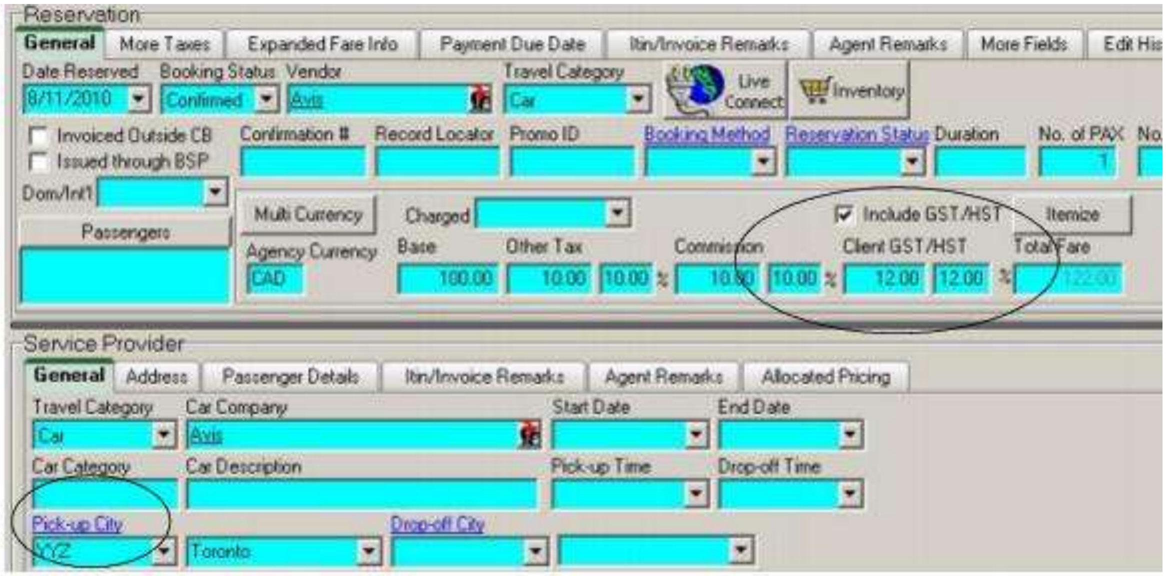


Note: There is a setting in the General Tab, *Use Global GST/HST Rate* for agencies in areas that use GST/HST but are not required to calculate taxes based on Province (the Caribbean), using this setting ignores the rates set up by Province under the Region Tax tab, but will instead use the Global rate entered as the default. Upon checking this box a GST/HST Rate field is displayed. Enter the Global rate to be used in calculating the taxes.

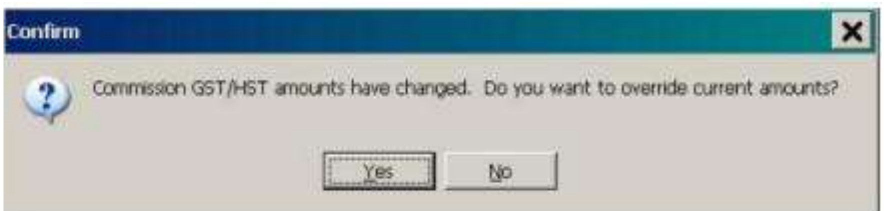
2) Upon entering new Reservations in the *ClientBase* Res Card the default GST/HST rate used for both Client GST/HST and Commission GST HST is now determined by the Travel Category and the new Province table located in Step 1 above under **Global Defaults|Res Card Defaults|Tax and Commission Defaults.**

a) For Air, Hotel, Cruise, Tour, Rail and Transportation reservations, make sure in each of the Vendor Profiles used for these types of reservations have a **Province** filled in, and in the **Country** field, either leave blank, type Canada or CA.

b) Car reservations look at the *Pick Up City Province* field in the Service Provider area to determine the default GST/HST rate to apply.



(**Note:** If the GST/HST amounts have already been entered and the Pick Up City Province rate is different, the user gets prompted with the option to override the current amounts.)



c) Service Fees look to the <u>client profile's **Province** field</u> to determine the default GST/HST rate to apply.

d) Insurance and International defaults as <u>zero rated</u>.

e) Transborder Reservations <u>default to 5% for all Travel Categories</u>.

Please note that these default rates are simply defaults and can be updated on a reservation-by reservation basis. If the user overrides a reservation percentage in either the client GST/HST field or the Commission GST/HST field, <u>the other field will be updated to reflect the same percentage</u>.

For example, if client GST/HST is defaulted to 5% and user changes it to 13%, then the Commission HST changes to 13% also, and vice versa. If the user wants to override one percentage, but not the other, then a dollar amount must be entered in place of a percentage.

Since a large portion of the Commission GST/HST calculations is based on the profile Province where the client or vendor resides, **it is important to ensure your client and vendor profiles contain a Province and non-Canadian profiles contain a Country code.** The province should use 2 letter codes as follows: BC, AB, etc.

3) The lookup logic on the profile will first look for Canadian profiles by checking the country field. If the **Country** field contains *CANADA, CA or is blank*, it will look in the **Province** field to determine if there's a match to one of the Provinces in the rate table and if so, use the applicable rate to calculate the default GST/HST for the Reservation.

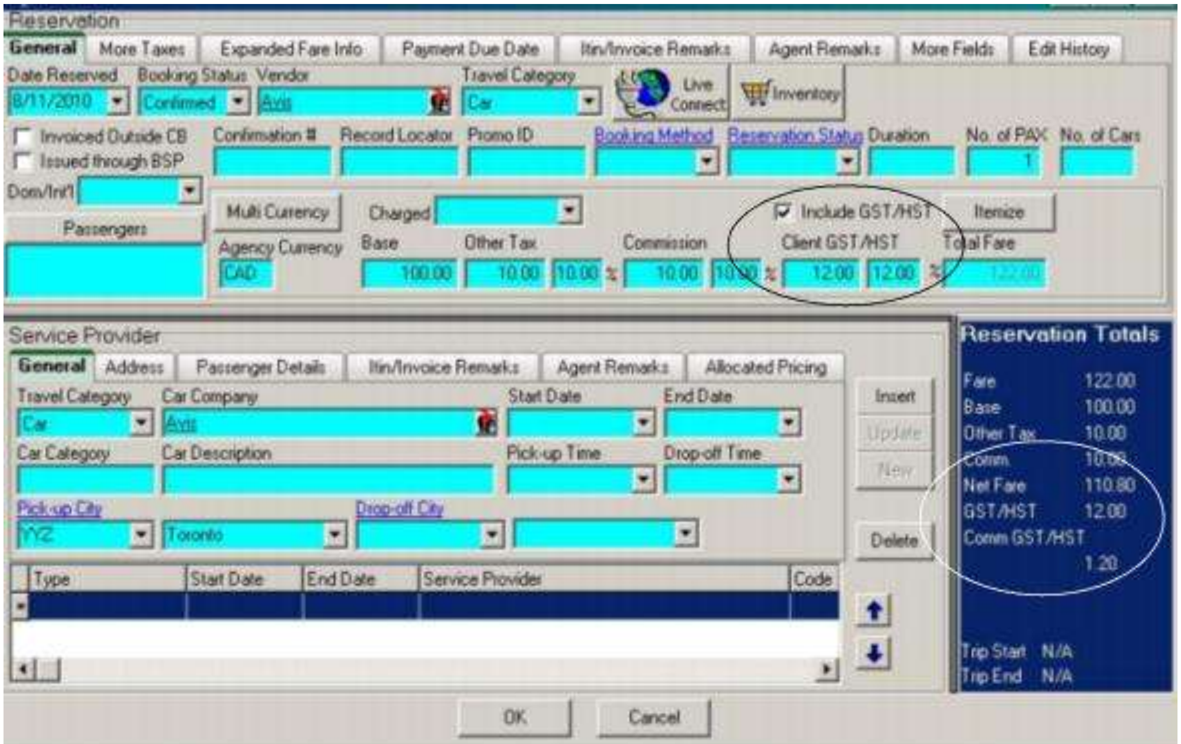
4) Querying profiles and sorting by Country and Province will help you quickly locate profiles with empty fields and the Global Modify feature (used with caution) can help to easily populate those fields.

Be sure to backup your database before using the Global Modify feature.

5) For cars, *ClientBase* uses the <u>Pickup City in the Service Provider</u> record and then uses the city code table to locate the province and lookup the province rate.

Therefore, **it is also important that your city code table (Global Defaults|General Setup|User Defined Fields|City Codes) has province codes for each applicable city and they match the province codes included in the Global Defaults|Res Card Defaults|Tax and Commission Defaults.**

6) Both Client GST/HST and Commission GST/HST amounts can be viewed at the same time regardless of which Reservation tab is currently active. That means agents do not need to click on the More Taxes tab to view the effects on the Commission GST/HST when making changes to the Client GST/HST or vice versa.

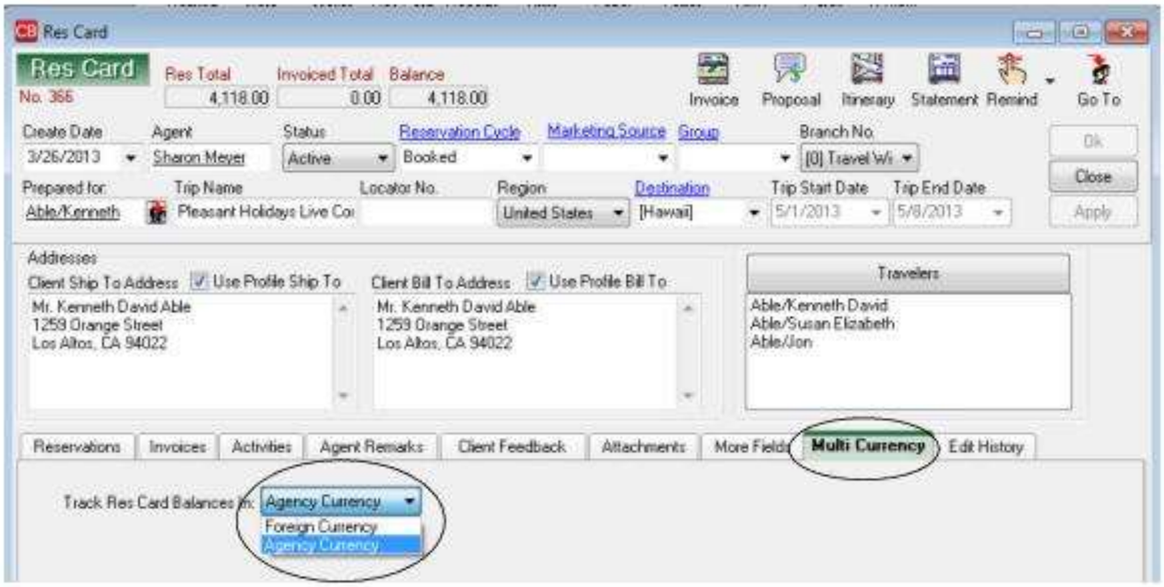


Note: If using Live Connect and PNR Import features so that if GST/HST applies, and no Commission GST/HST is included in the file, the same logic described above is used to default the Commission GST/HST rate.

Handling Multiple Currencies

When handling multiple currencies, reservations can be tracked in the agency's currency or reservations can be tracked in the foreign (vendor) currency. The setting *By Default Track Res Card Balances In*" under **Global Defaults|Res Card Defaults|Currency Setup** can be setup as the default. This is simply a default and can be overridden per Res Card.

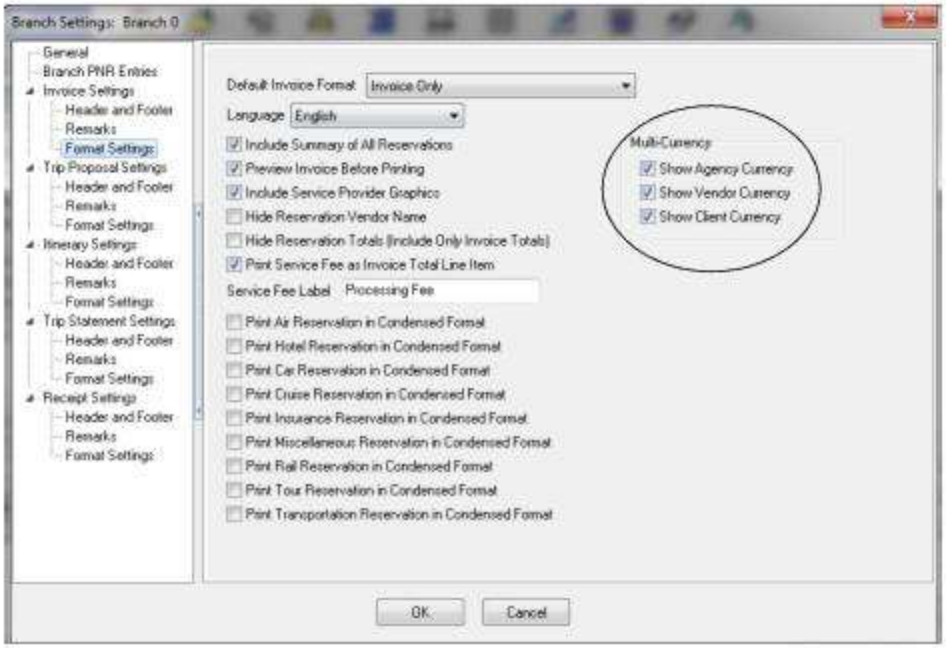
A Multi Currency tab added to the Res Card also contains this *Track Res Card Balances In* setting in order to update Res Card balances on a one-by-one basis. (**Note:** All multi currency Res Card balances entered prior to version 3.6 will remain in the Agency Currency unless modified individually.) New reservations with multiple currencies are also tracked in Agency Currency until the setting is changed in Global Defaults or the setting is changed per Res Card under the Multi Currency tab.



Although res card balance tracking can be changed from Agency Currency to Foreign Currency and vice versa, change will only occur if Res Card is not invoiced. If the Res Card is already invoiced, this setting under the Multi Currency tab is disabled. If changing from Agency Currency to Foreign Currency, the system checks to see if the record contains Markup/Discounts and if so prompts, *Markup/Discounts exist and are not supported when balances are tracked in the Foreign Currency. Continuing will clear any Markup/Discounts entered. Continue? Yes/No*."

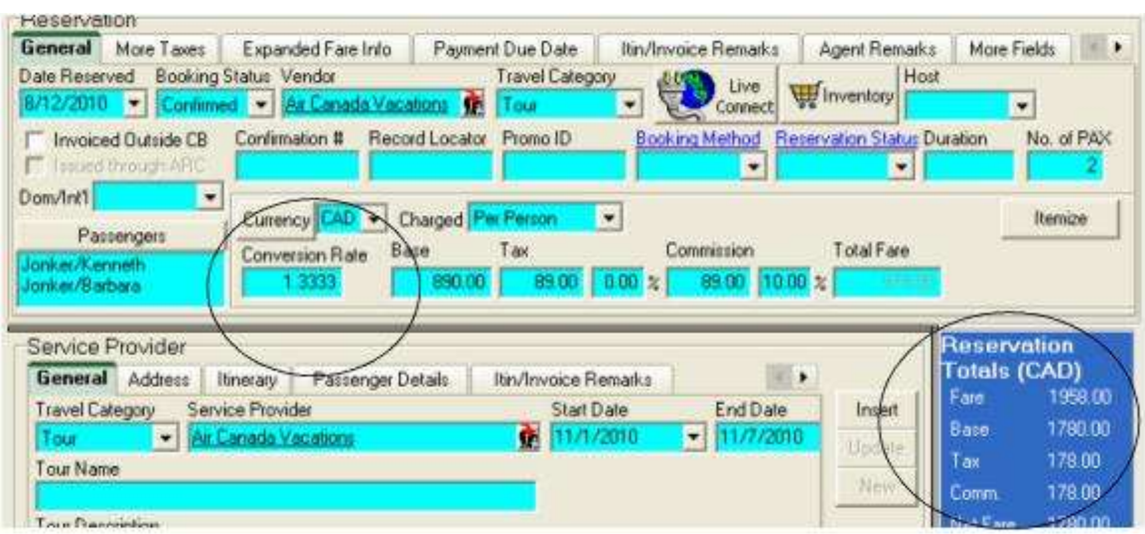
When tracking Res Card balances in Foreign Currency, itemization can now be captured. Itemization is captured in the reservation's currency. If itemization is captured and user changes the selected currency, user is prompted *Changing the Reservation Currency will clear all Itemization details. Do you want to continue? Yes/No.* Since itemization cannot be captured when Res Card balances are tracked in Agency Currency, if changing Res Card from Foreign Currency to Agency Currency the system checks to see if Itemization exists and if so prompts *Itemization exists. Currency cannot be converted at the itemization level. Continuing will clear all itemization details. Continue? Yes/No*

If agency chooses to continue to track reservation totals in the agency's currency, an invoice setting gives the options of showing traveler pricing for each reservation in Agency, Vendor and/or Client currency on an invoice. Select **Utilities|Branch** and then click *Format Settings* under Invoice Settings (this can be done remember at the time of invoicing, by clicking on *Invoice Format)*. A Multi-Currency section is available for selection with the options of *Show Agency Currency, Show Vendor Currency and Show Client Currency*. All three or any combination of these settings may be selected; therefore, check the box or boxes of the currencies that should appear for pricing on an invoice. These settings are only used when Track Res Card Balances is set to Agency Currency.



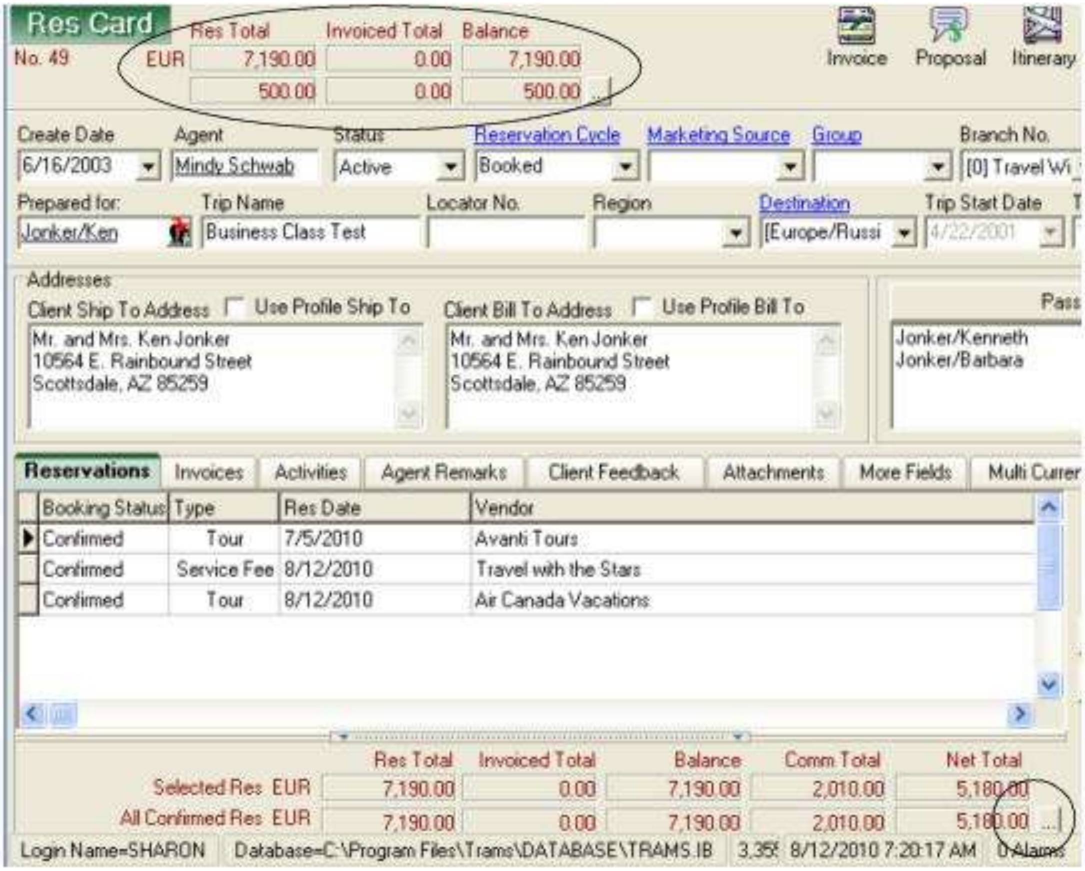
Example: An agency located in Canada booked a cruise with a US vendor. In the Multiple Currency screen the Vendor currency was entered as $1500 US dollars. The Agency Currency was entered as $1400 Canadian dollars. If the *Show Agency Currency* option was checked, only the Canadian dollars appear under pricing when the invoice is generated. If both *Show Agency Currency* and *Show Vendor Currency* options were checked, pricing appears in both Canadian dollars and US dollars. If the client paid for the reservation in a different currency (i.e. Euros) and that amount was entered as the Client Currency on the Multiple Currency screen and all three options where checked, pricing would appear in all three currencies.

If agency chooses to track reservation totals in the foreign currency, when tracking balances in Foreign currency there is no longer a Multi Currency screen. Each reservation is entered in the currency it was booked in by clicking the Currency drop-down and selecting the correct currency code. Once the currency code is chosen the currency rate is displayed. Currency rates are based on the Currency Setup in Global Defaults but can be changed at the time of booking if needed. However, if ARC/BSP is checked, the currency must remain in the agency's currency and the Currency field is disabled.

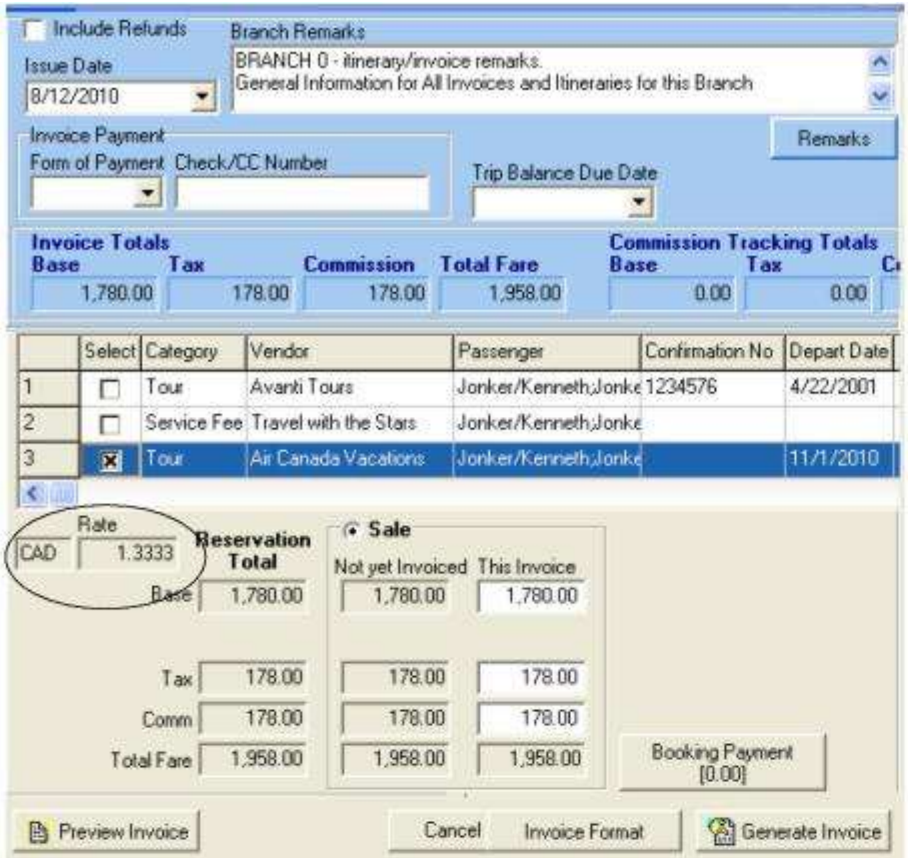


For each reservation, the Reservation Totals summary on the right side of the screen shows the currency code for all foreign currency bookings. The Res Card totals in the Res Card Header will summarize all balances with one line per currency. The first two currencies are displayed; however, if more lines exist, click the button next to the Res Card header to view all.

Reservation totals at the bottom of the Res Card show the balance of the Selected Reservation in the currency it was booked along with the Currency Code. The balances displayed for All Confirmed Reservations summarize all reservations booked in the agency's currency. Click the button next to the Reservation totals at the bottom of the Res Card to view all Reservation totals.



<u>Invoicing</u>: On the invoicing screen, each reservation appears in the currency the reservation was booked in along with the conversion rate. Conversion rate can be changed if needed.

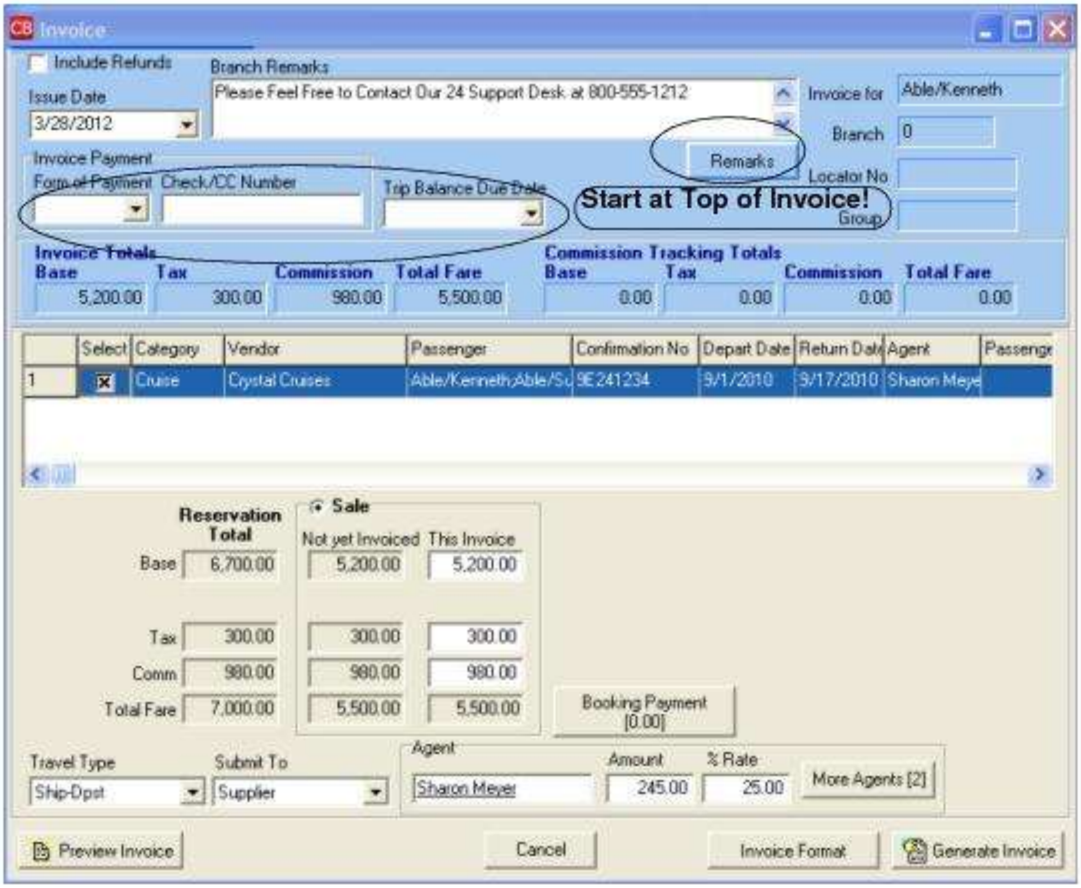


When printing all invoices, each reservation appears on the invoice in the currency it was booked in. All reservations are then totaled per currency and appear at the bottom of the invoice, one box of totals per currency.

Client payments are printed on the invoice in the reservation's currency. If agency also uses *Trams Back Office* software, client credit card payments are saved in TBO in the agency's currency. Client payments entered as CC Merchant, Debit Card, Check and Cash payments are not saved in TBO and need to be handled in the back office by the bookkeeper.

Generate an Invoice - Overview of Screen

To create an invoice for any reservation record or combination of reservation records that have not been invoiced in full, click the *Invoice* icon in the header of the main Res Card screen.

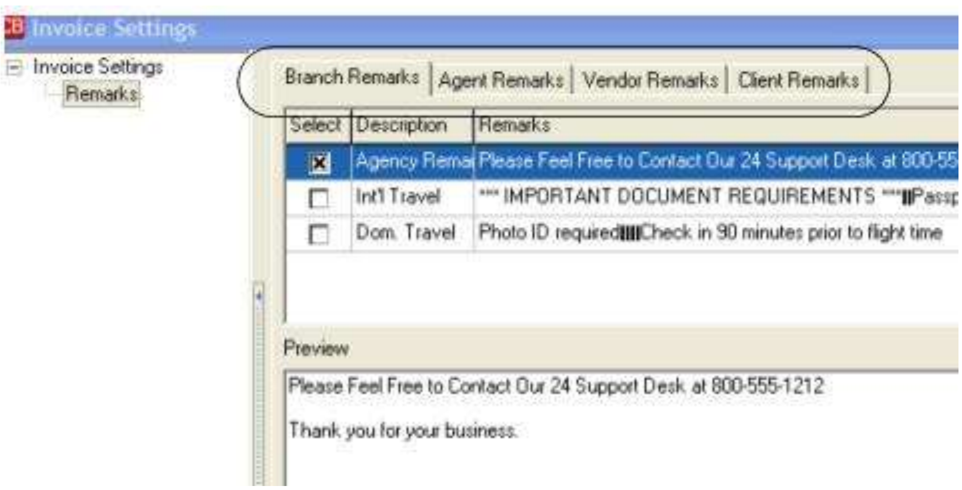


1) Start at the top of the invoice screen.

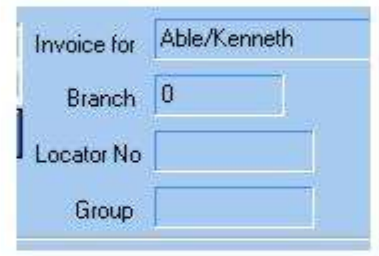
Include Refunds: If you want to refund any reservation that has been invoiced to date, check this box. (See section *Generate Refund Invoices* below.)

Branch Remarks: These default branch remarks can be edited by typing in the area. But you can see a full list of additional remarks and edit by clicking *Remarks.*

Remarks: Click *Remarks* to choose from tables of Branch, Agent, Vendor, or Client remarks. Check off the remark/s to use with this particular invoice, and then *OK*.



Note: Branch Remarks have been setup by the database administrator, but Agent, Vendor, and Client Remarks can be setup in any Agent, Vendor, and Client Profile by clicking on the *Res Card Remark* tab. Vendor remarks appear under the Vendor level reservation data after vendor level Itin/Invoice remarks. At the end of the invoice, remarks appear in this order: *Branch Remarks, Insurance Waiver, Client,* and *Agent Remarks.*



Invoice For: This information is pulled from the Res Card header.

Branch: The branch number is pulled in from the Res Card header.

Locator No: The record locator number is pulled in from the Res Card header.

Group: The group is pulled in from the Res Card header.

Issue Date: Defaults to current date, but can be changed by manually inputting another date, or clicking the drop-down arrow and double-clicking a date on the calendar.

*__Form of Payment:__ From the drop-down menu, choose *Cash, Check, Credit Card,* or *CCMerchant.*

Attention Canadian Users: *1)* You have the ability to select a form of payment, *Debit Card.* This FOP gets automatically saved in TBO as an EFT, but prints on the invoice as *Paid by Debit Card.* This is designed to handle agency processed debit cards (ATM type cards) that automatically draft from the client's bank account.

2) ClientBase invoicing and receipts when working with TBO version 3.3 or above utilizes a setting which now stores a default Bank Account for EFT Pay Method at the Branch and Global level. Upon issuing an invoice or receipt in CBW with a Form of Payment as Debit Card the following hierarchy is used to determine the default bank account the payment record should be linked to:

- Branch EFT Bank Account
- Branch Default Bank Account
- Global EFT Bank Account
- Global Default Receipts Bank Account

*__Check/CC Number:__ Enter check or credit card number for payment.

Trip Payment Due Date: Type in when the next trip payment is due.

***If you have different forms of payment for each reservations, do not use these fields. If you are applying a voucher, do not use these fields.** For different forms of payments or to apply vouchers, use the fields contained within the *Booking Payment* button below, making sure to put the correct *Submit to* and *Travel Type* for each FOP.

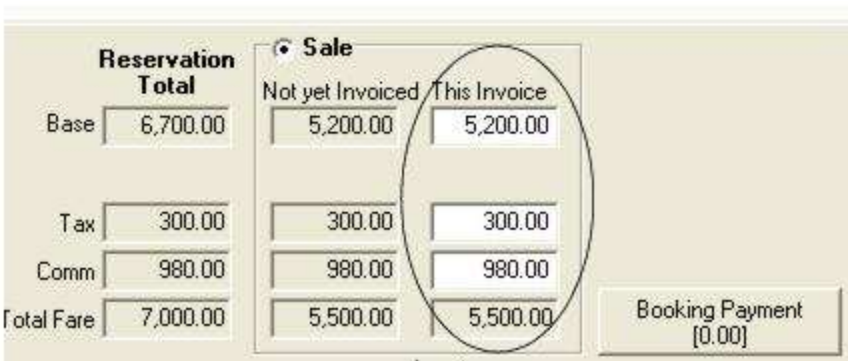
Note: If you are just invoicing and not receiving a payment when you click *Preview the Invoice,* a dialog box appears. Type in the date payment on this invoice is due in *Payment Due Date* and click *OK*.

Invoice Totals - Base/Tax/Comm/Total Fare: Summarizes totals for this invoice.

Commission Tracking Totals - Base/Tax/Commission/Total Fare: Summarizes totals for this Commission Track invoice.

Reservation One-Line Summary: For each reservation includes are: *Select, Category, Vendor, Traveler, Confirmation No, Depart Date, Return Date, Agent, Traveler Name, Start Ticket No,* and *End Ticket No.*

Reservation Total - Base/Tax/Comm/Total Fare: This area reminds you of the original reservation totals.



Not yet Invoiced - Base/Tax/Comm: This area reflects what has not been invoiced for this Res Card. As you fill in the totals to be invoice, this area automatically reflects the new non-invoiced totals.

Important Note: Each reservation has a unique *Travel Type* and *Submit To* (for *Trams Back Office*). You need to make sure that these are filled in correctly or you'll receive error messages that prohibits invoice issuing.

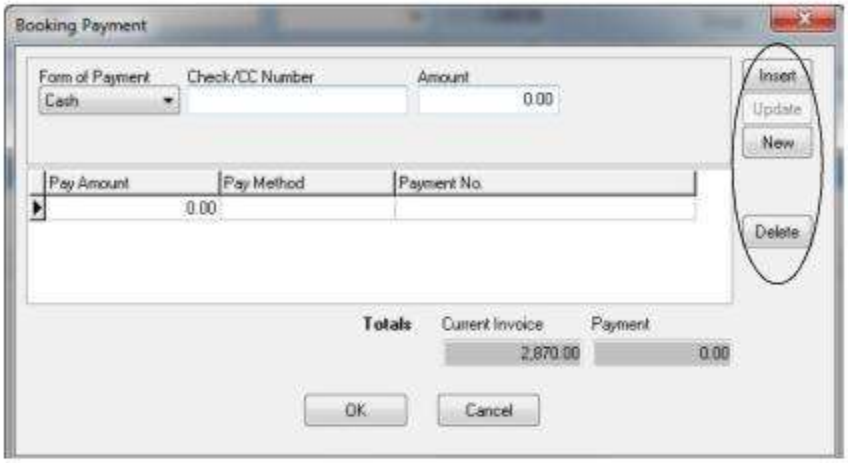
This Invoice: This is where to input the totals for your invoice. In the Base Fare field, enter the amount of this invoice. Next, enter any taxes for this invoice, and, finally, enter the commission received for this invoice. (If not taxes or commission are being collected for this invoice, input 0.)

Booking Payment (Use this area for Different forms of Payments): Enter multiple Forms of Payment including vouchers for a single reservation or different reservations in this area. In addition, partial payments can also be captured upon invoicing (payments totaling less than the invoiced amount).

Note: This does not apply to ARC type reservations, neither a partial payment or multiple Forms of Payment will be accepted for ARC reservations.

To capture more than one payment, or a partial payment, for a single Reservation, click the *Booking Payment* button:

The Booking Payment screen has the ability to capture multiple payments by using the *Insert, Update* and *New* buttons. This screen also displays the reservation's *Current Invoice* amount as well as the total payments entered so far. Payments cannot total more than your *Current Invoice* amount. If your payments total less than your *Current Invoice* amount, then you are prompted with the following options upon trying to save the Booking Payment:



• **Update Invoice Amount:** Changes the Current Invoice amount to match the total Payments entered.

• **Leave Balance Open:** Leaves the Current Invoice amount and total payments as is and creates an open booking for the balance.

• **Return to Payment:** Takes the user back to the Booking Payments screen to update the payments accordingly.

When a single payment (or no payment) is applied to a single reservation, upon generating an invoice, the system creates one invoice booking record for the one reservation. When either multiple FOP's (Forms of Payment) or partial payments are entered for a single reservation, the system then creates a separate Invoice Booking for each FOP. Each Invoice Booking created is identical except for the booking amount, which matches the payment amount.

Important Note regarding single payments for multiple bookings saving as separate payment records: *ClientBase* saves a separate payment record for each booking, even if there is a single Form of Payment. In other words, if a cruise deposit of $200.00 and an insurance reservation of $300.00 is invoiced at the same time with one check, #255 for $500.00, upon generating the invoice, two invoice bookings are created and two payment received records are created, one for $200.00, and one for $300.00.

Important Note regarding handling Commission and Tax amounts when multiple or partial FOP's results in split bookings: *If multiple payments add up to the amount being invoiced, handle commission with the following hierarchy:*

- Put invoiced commission total on largest Cash, Check, EFT or CC Merchant booking

- If no Cash, Check, EFT or CC Merchant FOP’s, then put invoiced commission total on largest CC booking

If multiple payments add up to the amount being invoiced, handle tax with the following hierarchy:

- Put full tax on the largest booking regardless of FOP

- If it’s a partial payment (payment amounts do not add up to invoiced amount), put all tax and commission on the open booking

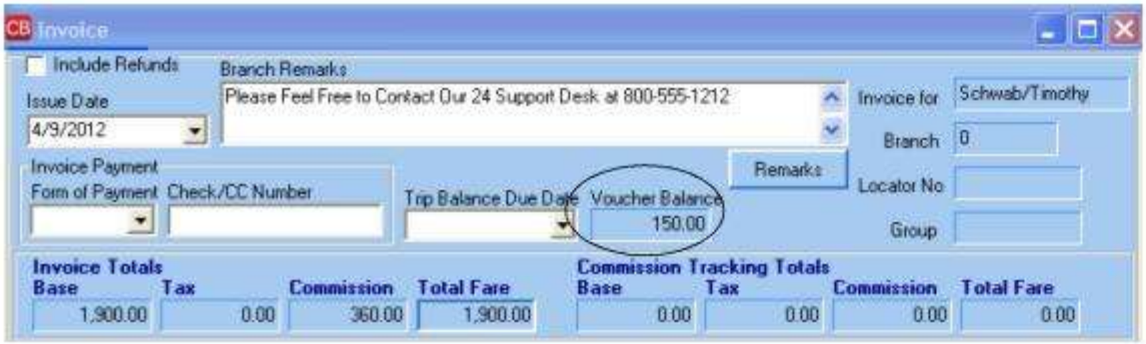
- Don’t worry about invoice bookings resulting in negative Base Fares

- Don’t worry about invoice bookings resulting in negative net amounts (commission being greater than base or total fare). A new "Voucher" form of payment is now available when generating an invoice.

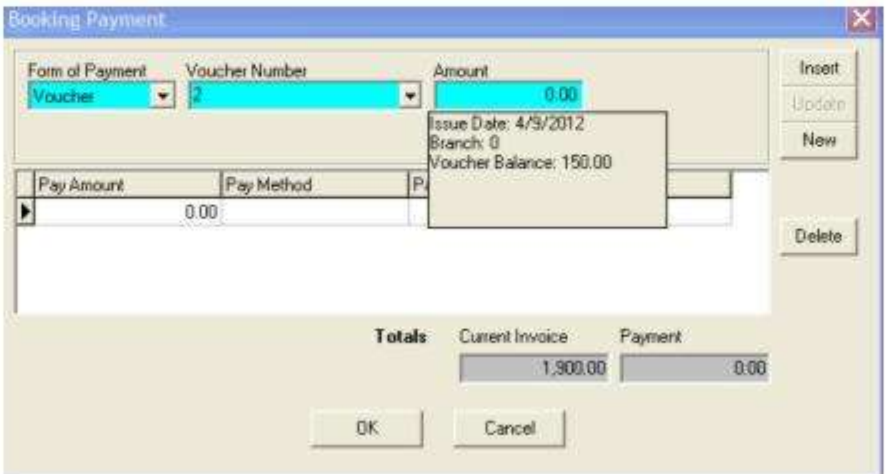
Voucher Form of Payment: Previously, as agents received money from customers for payment against future trips, the agent created a receipt in *ClientBase*. Later, once a trip was booked and the time came to apply the receipt against an invoice, the agent could generate the invoice but someone in Back Office had to apply the receipt against it. Now if given permission, an agent can apply a voucher in *ClientBase* when invoicing.

A setting *Disable Voucher Form of Payment* was added to the **Advanced Security Level|Other Restrictions** tab of user settings in order to control who is allowed to perform this function. When unchecked, an agent is able to see Total Voucher Balance on both the profile and invoicing screen and has the ability to apply the balance against invoices. This setting is unchecked by default and therefore you must check the box to disable the feature for any user you do not want to perform this function.

Vouchers are applied to invoices at the booking level. Displayed next to the Trip Balance Due Date is the Voucher Balance. This field only appears if the customer has a voucher balance.



To apply all or part of this balance, complete the invoice details as usual and click the *Booking Payment* button. Select Voucher as the Form of Payment and click the down arrow on the Voucher Number field to see a list of all vouchers. When highlighting a voucher number you will see the voucher's Issue Date, Branch, Group, Voucher Balance and any Payment Remarks to help in deciding which voucher to use. Select the voucher number to use, enter the amount of the voucher balance to apply and then click Insert. Repeat this process if using multiple vouchers.



All booking payments must add up to the same amount invoiced for that booking. If the amount of the voucher selected is greater than the amount invoiced, the voucher balance is updated to reflect the remaining balance for future use. Voucher payments appear on invoice as *Paid by Prior Receipt*.

Notes: **Res cards with foreign currency reservations are NOT allowed to use this new form of payment.

**If your agency syncs databases, vouchers can only be applied to an invoice from the Primary.

**If your agency is a *Trams Back Office* user, when a voucher is applied to an invoice, a zero payment is recorded in TBO that shows the voucher was applied to the invoice. If the voucher was greater than the invoiced amount, the original voucher's balance is updated to show what is remaining.

Travel Type: From drop-down menu, choose appropriate *Travel Type. Trams Back Office* users want to choose the one that corresponds with *Trams Back Office* travel types.

Reminder: Make sure the *Travel Type* and *Submit To* are properly filled out for each reservation.

Submit to: From the drop-down menu, choose appropriate *Submit To*. *Trams Back Office* users want to choose the one that corresponds with *Trams Back Office* Submits To as setup by bookkeeper. If the Submit To field is set to *CommTrack,* a little checkbox appears just above the *Not Yet Invoiced* column of the invoice screen. This is your global default setting showing if Commission Track items paid by credit card print on the invoices for that travel category. So if you normally default to print, but for this one invoice you don't want payments to print, you can remove the check. If your default is not to print, but for this one invoice you want payments to print, add the check.

Notes for TBO Users: When invoicing Supplier or Commission type transactions paid by *Cash, Check or CC Merchant,* a field is added to the invoicing screen called *Due Vendor*. This *Due Vendor* field is designed to capture the date the payment is due to the vendor being invoiced. This date defaults to either the *Deposit Due Date* or *Final Payment Due Date* captured in the *Payment Due Date* tab of the reservation depending on whether the reservation has been invoiced yet or not. This default can be overwritten at the time of invoicing and the date captured is saved in the *Date Payable* field in *Trams Back Office*.

There is also a *Due From Vendor* date field which appears for Comm Track type bookings. This field defaults blank, but if completed, lands within the *Date Payable* field within the *Trams Back Office* view of the invoice booking and represents the date the commission should be paid by the Vendor.

Agent/Amount/%Rate: The agent is pulled in from the Res Card header, but can be changed from the drop-down menu. Adjust *Amount* or *%Rate* if necessary (this is being pulled from the agent profile).

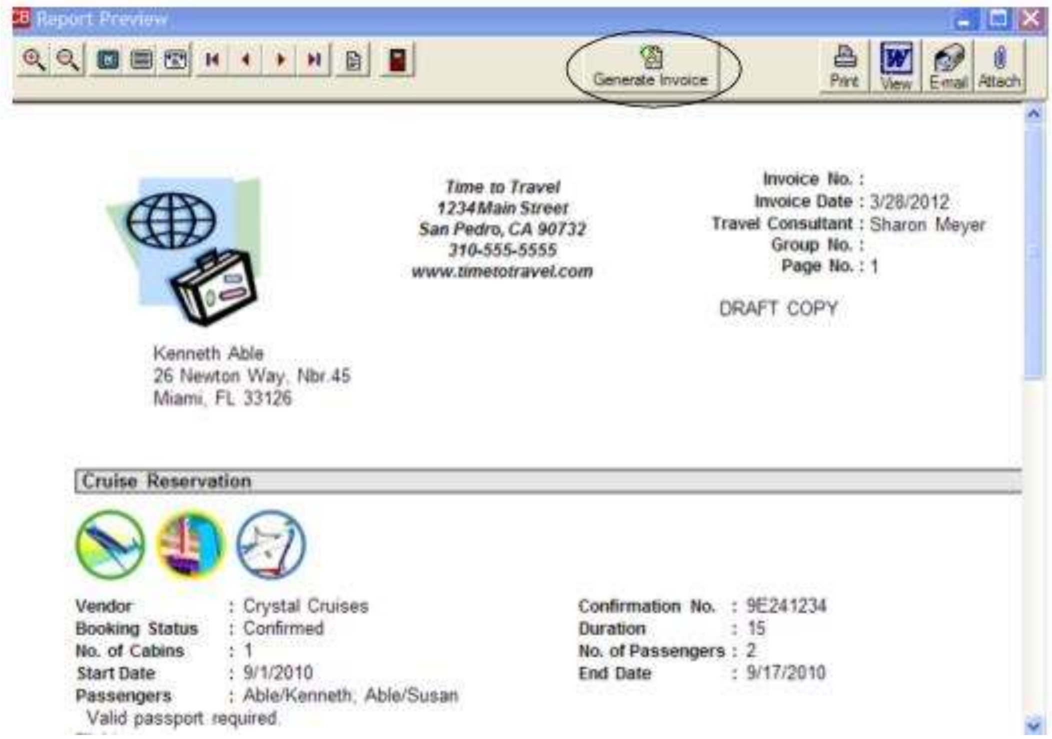
More Agents: By clicking this area, add more agents to this invoice, indicating *Inside* or *Outside, Amount*, and *% Rate*. By clicking *Default*, the default agent rate from the profile is automatically placed in the data entry screen. Add a remark if desired. If the agent reconciliation routine is run in TBO, the *Date Paid* field is filled in at the completion of the routine.

To disallow agents to view other agents' commission default, setup the user login permissions to include an option called *Disable Ability to View Agent Commission when Invoicing.* If this option is checked, then that user is not be able to see the default Agent Commission % or Amount when working with the agent lists at the time of invoicing. The user is able to see what default agents are assigned to the invoice and have the ability to attach additional agents to the invoice if desired, but neither the % nor amount is displayed. Here's a summary of how the agent commissions default upon invoicing:

- Within *Trams Back Office* you can set default agent commission rates at both the Travel Type level and the General level. *ClientBase* looks first for a default rate at the Travel Type level and if no default rate exists, then looks for a default rate at the general level. Any default agents and agent rates, can be overwritten at the time of invoicing if the *User Login* is set with the permission to do so.
- The primary agent for the Res Card is defaulted at the time of invoicing as the agent for the invoice. If the agency uses *Trams Back Office*, and the agent profile in TBO has a default Inside Rate, that Inside Rate becomes the default agent rate for that invoice. If there is no default Inside Rate, then the default Outside Rate becomes the default agent rate for that invoice. If there is no default Inside or Outside Rate within the agent profile in TBO, then there is no default agent rate for that invoice.
- If the client being invoiced has a default agent and agent rate associated in *Trams Back Office*, then that agent also defaults as an additional agent for the invoice in addition to the primary agent for the Res Card.

These default commission percentages and amounts can be overwritten at the time of invoicing, if the users do not have the *Disable Ability to View Agent Commission When Invoicing* option within their user logins checked off.

Preview Invoice Before Printing: Important to view the invoice before it is generated to ensure accuracy. If you find an error, return to the reservations, and correct the errors. If there are no errors, click *Generate Invoice* from this screen and proceed to e-mail, print, etc. (see below for these options.



Once you click *Generate Invoice*, if there are errors, the invoice must be voided.

Cancel: Click to abort invoicing process.

Invoice Format: Click here to override the invoice formats setup by the database administrator***:***

Default Invoice Setting: Set the Res Card invoice default as *Invoice Only* which is a shorter invoice format that does not included all itinerary level information; or *Itin/Invoice* which is a longer invoice format that does include all the itinerary level information.

Include Summary of All Reservations: Set the Res Card invoice default by checking if you want reservation details including balance due date to appear on the invoice.

Preview Invoice Before Printing: Set the Res Card invoice default by checking if you always want a preview invoice (highly recommended) to be printed before actually generating the invoice. If the invoice looks incorrect, close out of the invoice generation area, go back to the Res Card and make all changes before generating the invoice.

Include Service Provider Graphics: Set the Res Card invoice defaults by checking here if you want service provider graphics included when an invoice is printed.

Hide Reservation Vendor Name: Gives you greater flexibility in customizing the print out of an invoice. If this setting is checked, then the Vendor Name for each individual reservation within the Res Card being invoice will not be printed, only the Service Provider Names.

Hide Reservation Totals (Include Only Invoice Totals): Gives you greater flexibility in customizing the print out of an invoice. If this setting is checked, then each individual reservation amount will not be printed, only the sum of all reservations being invoiced.

Print Service Fee as Invoice Total Line Item: Gives you greater flexibility in customizing the print out Service Fees on an invoice. If checked, this setting adds any reservations with a Travel Category of Service Fee and prints them as a single total amount listed within the Invoice Totals just underneath Reservation Totals, rather than listing as a separate reservation within the body of the invoice.

Service Fee Label: This is a free-flow field that allows for up to 25 characters and provides you with the ability to customize how agency service fees are labeled on the invoice.

Print Reservation in Condensed Format: The following *Print Reservation in Condensed Format* are broken down by Travel Category:

- **Print Air Reservation in Condensed Format**
- **Print Hotel Reservation in Condensed Format**
- **Print Car Reservation in Condensed Format**
- **Print Cruise Reservation in Condensed Format**
- **Print Insurance Reservation in Condensed Format**
- **Print Miscellaneous Reservation in Condensed Format**
- **Print Rail Reservation in Condensed Format**
- **Print Tour Reservation in Condensed Format**
- **Print Transportation Reservation in Condensed Format**

If checked, upon invoicing a reservation for that Travel Category a summary of basic Reservation information is included, rather than a detailed listing of all Reservation and Service Provider level information. This setting may be desired for reservations that you would like to place less emphasis on when printing invoices for your client. For example, if you are invoicing a cruise vacation, you may choose to place a greater emphasis on the cruise reservation and less emphasis on the Insurance, Airport, Hotel, etc.

Here is a listing of the reservation details included if *Print Reservation in Condensed Format* is checked. All other Reservation and Service Provider level data is omitted from the printed version of the invoice.

- Vendor Name, Traveler Name/s, Start Date, End Date

- If Supplier, ARC or Comm Track Show as Paid: Res Amount, This Invoice, Prior Invoice and Balance

- If Comm Track Not Show as Paid: Amount Details

Generate Invoice

Once generated, the invoice appears when queried in *Trams Back Office*, and the non-invoiced balances in *ClientBase* are updated automatically. Once you generate an invoice, you can print out the invoice by clicking *Print,* render it to *MS Word,* by clicking *Word,* or e-mail the invoice in a form of a pdf to client. (This means customers can view the details of the invoice in the body of the e-mail message, but can view the fully formatted invoice with all graphics and headers/footers if desired as well.) You can also attach the invoice as .pdf file to the Res Card you are working in. This gives you the ability to create a permanent record of an Invoice as it appeared at the time of generating it, including any customization, formatting etc. Go to the Attachments tab of the Res Card to access or print any of these attached files.

Make sure to create a mailer, so a record of the mailing is present in the Res Card and client profile. A list of all invoices which have been generated for a Res Card can be found in the Res Card Invoice Tab, where any can be reprinted or re-sent.

E-mail Invoice

Once an invoice has been previewed or generated, print or e-mail the invoice from the print screen. Click the *Merge to E-mail* icon to send the invoice. This feature works for both the MAPI and SMTP methods for sending e-mails and e-mails the invoice in a form of a pdf to client. (This means customers can view the details of the invoice in the body of the e-mail message, but can view the fully formatted invoice with all graphics and headers/footers if desired as well.) Make sure to create a mailer, so a record of the mailing is present in the Res Card and Client Profile. Res Card traveler e-mail addresses are available for selection with the primary e-mail-address checked by default.

View Invoice in Word

This feature requires MS Word 2000 or Word XP installed on each workstation running *ClientBase*. Once an invoice has been previewed or generated, view the invoice in *Word* by clicking the *Word* icon. Although when viewed in *Word*, the invoice is presented with a series of text boxes, some modifications can be made before printing, or the spell check feature can be used. (To give users permission to use this option, SYSDBA go to **Utilities|User Logins|User List**, and click *Advanced* in User Login. In the *Other Restrictions Tab,* remove the check from *Disable Ability to View Invoice in MS Word.)*

Attach Invoice as PDF to Res Card

Attach the invoice as .pdf file to the Res Card you are working in. Clicking *Attach* gives you the ability to create a permanent record of an invoice as it appeared at the time of generating it, including any customization, formatting etc. Go to the *Attachments* tab of the Res Card to access or print any of these attached files.

Voiding an Invoice

To void an invoice in *ClientBase*, go to the Res Card Invoice Tab, select the desired invoice to void and click *Void Invoice*. You are prompted with a message "Track voided Invoice?" and given three options: *Yes* - voids the invoice but leave a history of the voided invoice within the Invoice tab; *No* - voids and deletes the invoice; and *Cancel* - cancels the voiding process.

To give you the desired security, this voiding feature is part of the advanced permissions included within each user login. By default, all user logins has this advanced permission disabled. If you would like to enable the ability to void an invoice for any of your users, log into the program as SYSDBA, retrieve the desired user logins, click *Advanced*, and the *Other Restrictions*. Uncheck the *Disable Ability to Void an Invoice Generated Through Res Card* feature.

Res Card Invoice PNR Rules

Agencies **NOT** using *Trams Back Office* (TBO) can print invoices from *ClientBase*, and then send the invoice data to a PNR in the form of accounting lines, so that it can be interfaced to their back office accounting system. In order to take advantage of this feature, *Merge to PNR Rules* need to be setup using the *Rescard Invoice* field group following the directions outline in the sections *Adding a Rule* and *Handling Blank Merge Fields*. (The *Res Card Invoice* field group includes a designated list of Res Card invoice fields available for using within a PNR rule.) Need sample invoice rules for your GDS? E-mail **Trams.GDSDesk@Sabre.com.**

Note: (Do not pass Res Card invoice data into a PNR for future invoicing if you have *Trams Back Office* as your back office system.)

Tip: Attend the live Invoice WebEx classes or the Daily *ClientBase* Q&A to learn more about invoicing in *ClientBase*. These WebEx classes are also recorded. Go to **www.sabretravelnetwork.com**, and click on the *Training* link to learn more.

Using Merge to PNR at the Invoice Level

The Merge to PNR at the profile level can be used to pass customer profile details to the current PNR. To pass Res Card invoice data into a PNR, a Merge to PNR feature has also been added within the Res Card invoice tab. After the PNR Invoice Rules have been setup as outlined above, use the *Merge to PNR* icon to pass both customer profile and Res Card invoice data to the current PNR by taking the following steps:

1) Use the Res Card *Generate Invoice* feature to print an invoice from within the *ClientBase* program.

2) After generating the invoice, click the invoice tab within the Res Card to view a listing of all invoices issued for this trip. Highlight the invoice to pass to the PNR in the form of accounting lines and click *Merge to PNR*.

3) A selection screen appears including *Profile Entries, Traveler Entries, Branch Entries, Agent Entries* and *Res Card Invoice Entries*. Since multiple reservations can be included on one invoice, each reservation is listed separately on the

selection screen. Place a check next to each reservation to pass to the current PNR and the reservation details are displayed in the format designated by the PNR Rules setup above.

4) Formats can be edited for accuracy prior to merging to the PNR if needed.

5) After the merge, display the PNR details or appropriate segment links prior to invoicing.

Quick Steps to Create a Res Card and Invoice in *ClientBase*

These are just suggestions which can be used as a foundation for your own invoicing process. These steps will create a BASIC Res Card and invoice:

1) For every client trip, find the client profile. If no profile exists, create a new one.

2) In the client profile, make sure the profile contains the following info: Accurate address, phone and e-mail.

3) Click the *Traveler* tab and review traveler list. Add any missing travelers by entering the First/Middle Name/Last Name and birthdate to start.

4) Click the *Cards* tab and review credit card (including valid expiration date) or other card information as needed for this trip. Edit or Add Card.

5) Click the *Res Card* tab and check for an existing Res Card. If a Res Card does not exist, click Res Card icon on toolbar at top of profile and create a new Res Card. All reservations and invoices are kept inside the Res Card. One Res Card per trip.

6) In new Res Card, choose appropriate Reservation Cycle (always use drop-downs if available), enter a meaningful Trip Name (used to find Res Card in profile or Res Card Manager), and select applicable Traveler Names. (If using the *PNR Import* of *Live Connect Import* feature, no travelers need to be added here. They will come in from the imports. But do add Region and Destination for consortia and marketing purposes. Enter applicable Agent Remarks. Click *Apply*.

7) From Reservation tab, add reservation to enter reservation details. For vendor, type in a few letters of vendor's name, tab, and choose from drop-down. (If there is not profile in system, create one.) Make sure the Travel Category is correct for this vendor.

8) Enter confirmation #, total pricing for this reservation, and Payment Due dates for Deposit and Final Payment.

9) In the Service Provider area add Trip Start Date/End Date along with any additional details. Click OK to save. (If this vendor is arranging more than one Service Provider for this reservation; i.e., cruise, insurance, tour, etc., the details may be individually added by inserting each in the Service Provider area.)

10) From main screen, continue entering reservations for each new vendor.

11) Apply to save all Res Card changes. Click the Generate Invoice icon on toolbar at top of screen.

12) Click Remarks and select desired remarks (created in Utilities|Branch) which prints at the bottom of the invoice. Enter a Trip Balance Due Date if applicable. Select Form of Payment

13) In the *This Invoice* area, enter the actual dollar amount paid at this time and the correct Travel Type and Submit To. On a credit card sale, if the Submit to is CommTrack and the booking is actually being paid (as opposed to a hotel guarantee), then make sure the Showed as Paid box is checked. Repeat process for each reservation being invoiced at this time. *Preview*.

14) If the amounts or other information doesn't look correct in preview, return to reservation and correct. Otherwise click *Generate Invoice* to issue the invoice. At this time, the invoice may be printed or e-mailed from this screen. Attach saves a true copy for future access. The invoice is now permanently available in the Invoices tab of the Res Card for reprint/e-mail at any time or in the Attachment tab of the Res Card or profile.

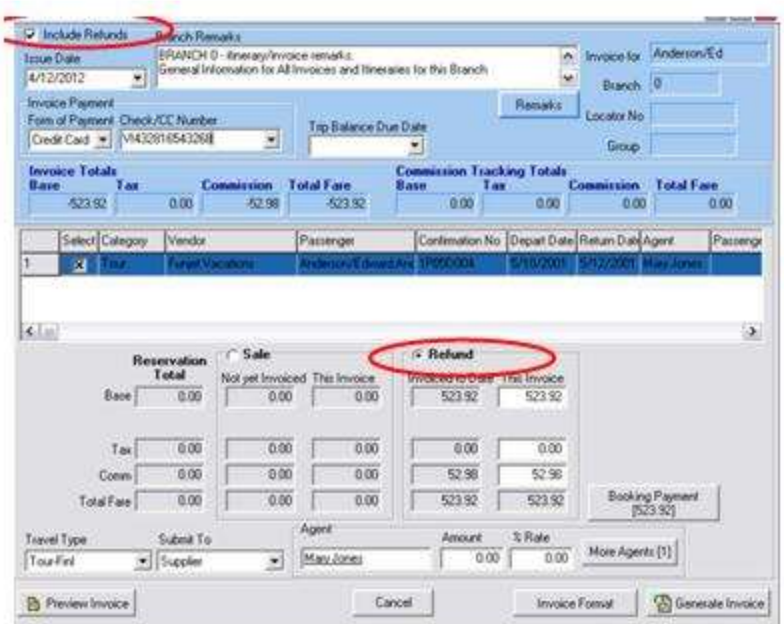
Generate Refund Invoices - Steps

Full Refund

Res Card with only one reservation what is Paid in full and Invoiced in full

Step 1: Open the Res Card and retrieve the reservation. Change the Reservation's Booking Status to Cancelled. The Res Card balance is updated accordingly and shows the full amount as a minus. If the trip is completely cancelled, change the Res Card Status to Cancelled.

Step 2: Generate Invoice. *Include Refunds* must be checked off. Complete the invoice payment fields with the original form of payment. In the *Reservation Total*, click on the Refund option. This field will then populate with the original. Invoice amount. (Matches the amount in the Invoiced to Date field.)

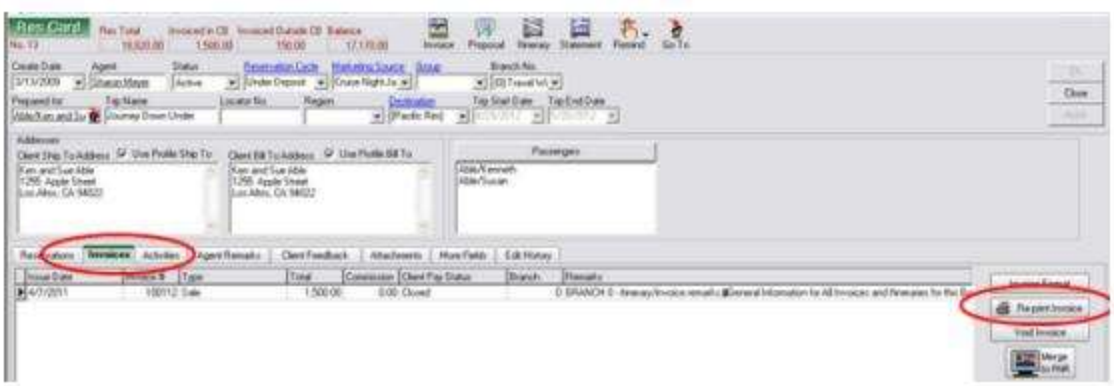


Review screen for accuracy. Invoice shows the refunded amount.

Reservation Price Changed - Deposit Invoice Previously Issued

Step 1: Open the Reservation and modify to the new amount. No Refund Invoice required since the correct amount will be shown with the final payment. Res Card totals will be updated accordingly.

Step 2: If the client want to see the modified cost of the trip, Reprint Invoice from Res Card Invoices tab. All changes including the adjusted amount will be reflected. Print or e-mail to customer.



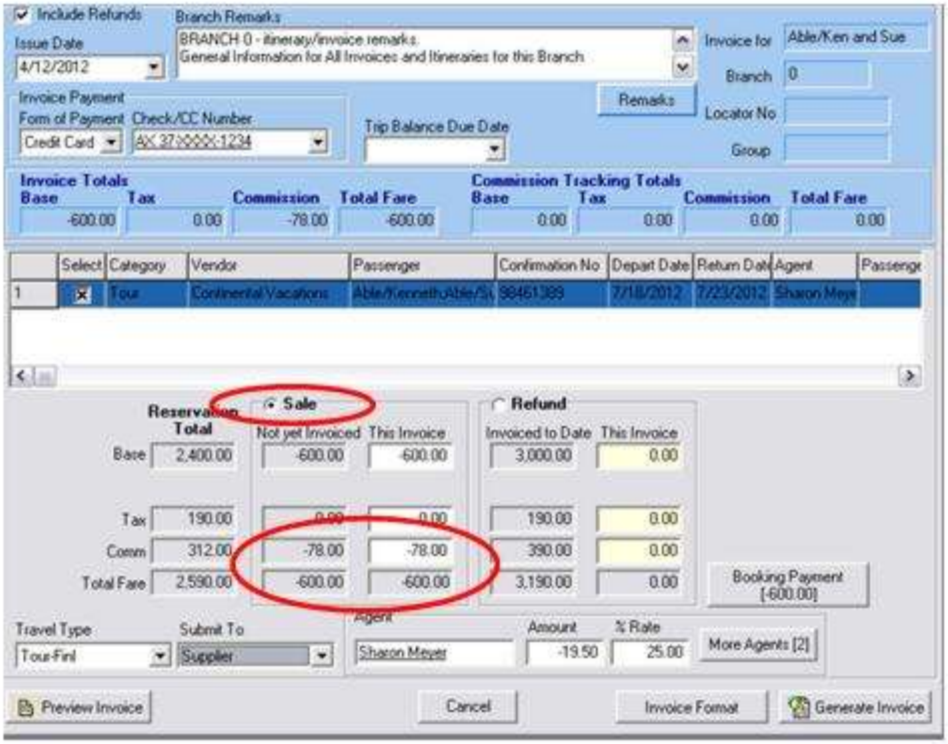
Partial Refund - Res Card with One Reservation/Paid in Full/Final Invoice Issued

Step 1: Open reservation and adjust the price to the new lower amount. Do NOT change Booking Status - still a valid booking.

Step 2: Review Res Card totals from main screen - verify accuracy (it will show a minus amount).

Step 3: Complete Invoice Payment fields with the original form of payment

Step 4: In the Reservation Total, click on the Sale option. This field will then populate with the refunded amount due back to the customer.

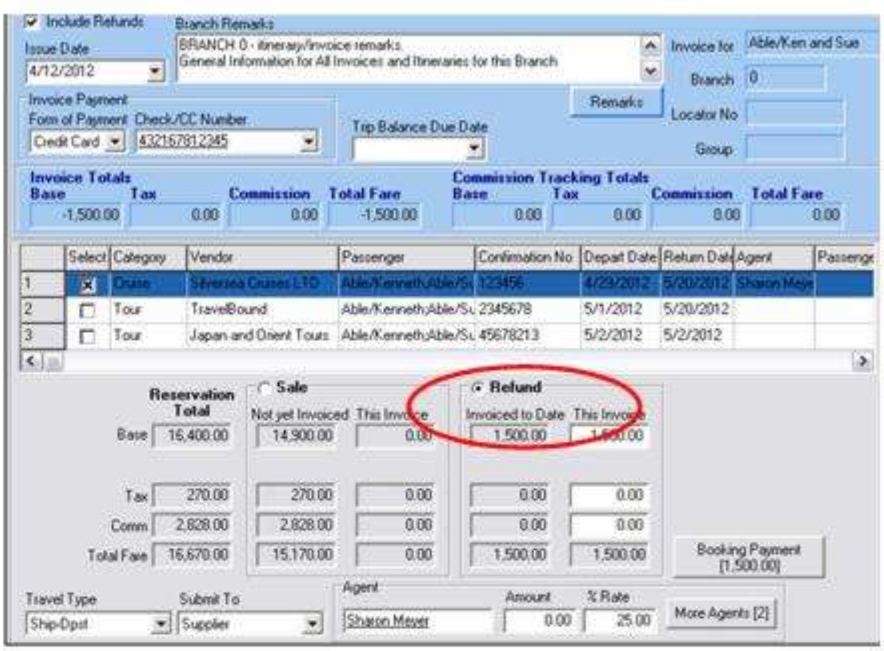


Note: If you select Refund, it will be the full amount of the sale. In this case, it's only the partial refund.

Refund with Multiple Reservations (Multiple Bookings with a Single Refund)

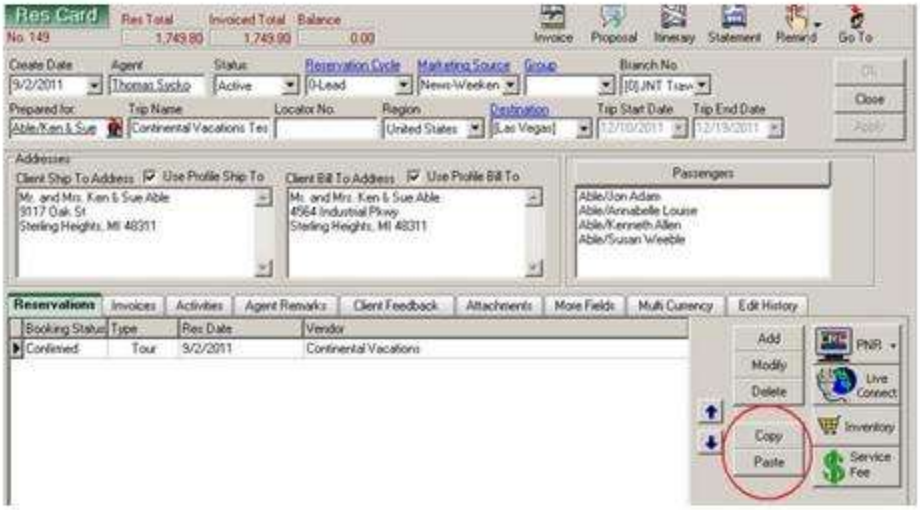
Step 1: Open the Res Card and retrieve the reservation. Change the Reservation's Booking Status to Cancelled. Leave Res Card as Active since only the one booking is cancelled.

Step 2: Select the reservation to *Refund* in the Invoice screen and refund the cancelled reservation. At same time, can Invoice active reservation payments as a *Sale.*



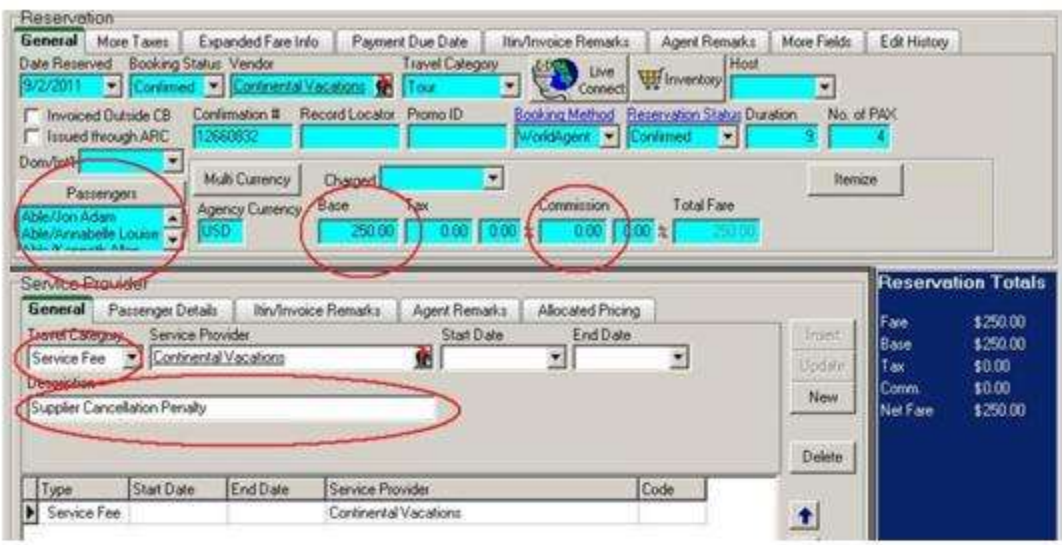
Refund with Vendor Penalty - Invoicing a Cancelled Booking with Supplier Penalty

Step 1: Copy the original booking using the Copy and Paste Buttons in the Res Card. Create a copy of the original, cancelled booking to use in recording the penalty amount.



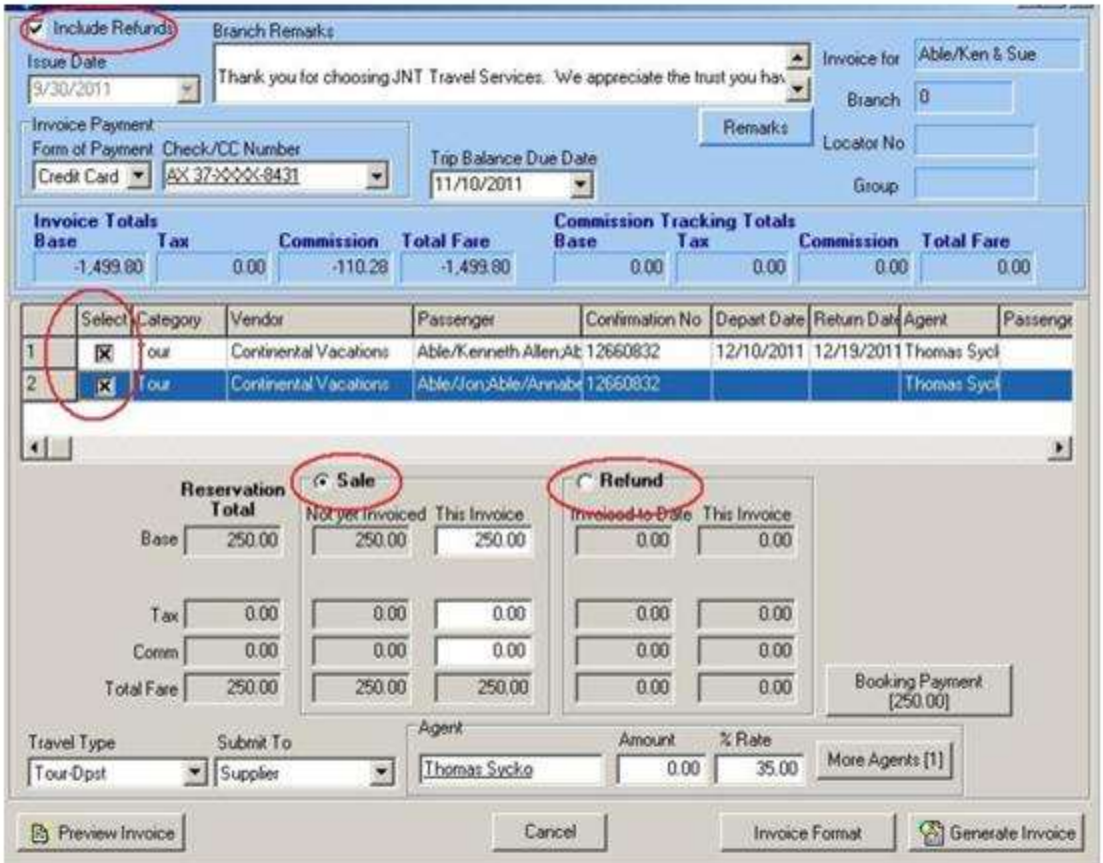
Step 2: Update Copied Booking by adding key data.

- Add the travelers. The copied booking defaults to no travelers.
- Change the booking amount to the amount of the penalty. Enter $0.00 as the commission unless the agency gets to keep any of its commission. If so, enter the amount the agency keeps.
- Delete the individual Service Providers (not applicable for this booking).
- Add a Service Provider for the Service Fee.



Step 3: Open the original reservation and change status to 'Cancelled'. Leave the rest of the information as originally entered. Review amounts for accuracy. Change the Res Card status to Cancelled.

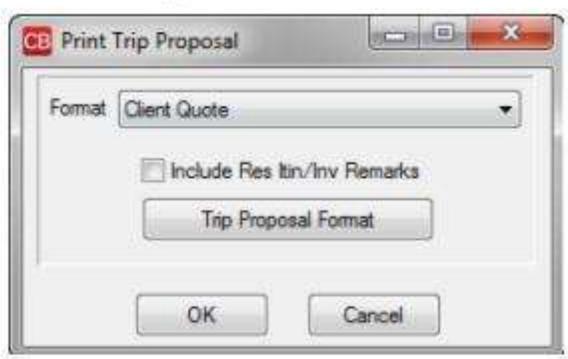
Step 4: Generate the Refund Invoice and check off *Include Refunds*. In the Form of Payment section, choose the type of payment that will be refunded (cash, check, credit card). Select the original booking, and at the payment amount, choose 'Refund', and enter the amount originally invoiced. Select the cancellation fee booking, and at the payment amount, choose *Sale* and invoice the full amount.



Preview the invoice to ensure the net refund is correct, then generate the invoice. The Res Card shows a zero dollar balance.

Reminder: If an invoice has more refunds than sales, a Refund Invoice is issued. If the invoice has more sales than refunds, then a Sales Invoice is issued. All invoices issued in ClientBase are available in *Trams Back Office*.

Generate a Trip Proposal



To print out a Trip Proposal for a client, click the *Proposal* icon on the Res Card toolbar.

Format: Select *Client Quote* or *Client Quote Invoice Style.* The *Client Quote Invoice Style* format uses the same reporting tool and format settings as the Generate Invoice feature, but simply prints a client quote and does not generate an invoice or update trip balances in any way. This is the perfect way to provide a format-friendly printout of reservations you have made which does not have to coincide with receiving payment from your client.

Include Res Itin/Inv Remarks: Click to include Itin/Inv remarks on reservations.

Trip Proposal Format: If you are using the format *Client Quote,* by clicking here you can pick from tables of Branch, Agent, Vendor, or Client remarks. Check off the remark/s to use with this particular trip proposal, and then *OK*.

Note: Branch and Trip Proposal Remarks have been setup by the database administrator, but Agent, Vendor, and Client Remarks can be setup in any Agent, Vendor, and Client Profile by clicking on the *Res Card Remark* tab. Vendor remarks appear under the Vendor level reservation data after vendor level Itin/Invoice remarks. At the end of the invoice, remarks appear in this order: *Branch Remarks, Insurance Waiver, Client,* and *Agent Remarks.*

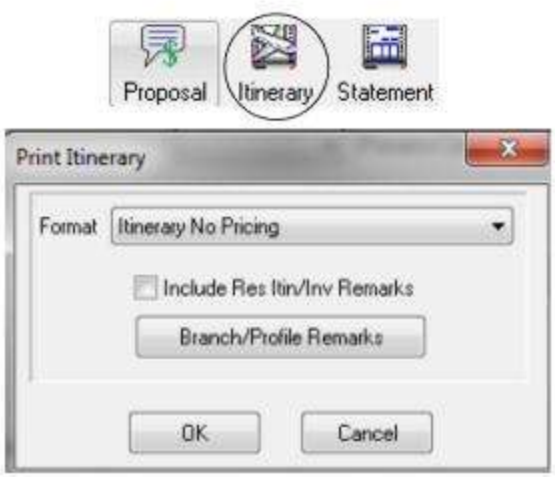
If you are using the *Client Quote Invoice Style* format, in addition to being able to select remarks, you also have the ability to override certain Trip Proposal defaults: *Include Service Provider Graphics, Hide Reservation Vendor Name, Hide Reservation Totals (Include Only Invoice Totals), Print, Service Fee as Invoice Total Line Item, Service Fee Label, and Print Reservation in Condensed Format* (if checked, upon invoicing a reservation for that Travel Category, a summary of basic Reservation information is included, rather than a detailed listing of all Reservation and Service Provider level information.)

The ***Client Quote*** format upon launching ends up in a word processing for editing. From here you can *Print,* send to *Word* for additional editing, *E-mail* to the client in text format only, or *Attach* as a pdf attachment to the Res Card. Clicking *Attach* automatically generates a .pdf version of the document you are viewing and attach it as a file to the Res Card you are working in. This gives you the ability to create a permanent record of an Trip Proposal as it appeared at the time of generating it, including any customization, formatting etc. Go to the Attachments tab of the Res Card to access or print any of these attached files.

The ***Client Quote Invoice Style*** like a generated invoice is "hard coded", but can be edited by clicking on the *Word* icon. When e-mailed the quote is in text format with a pdf in the e-mail *Attachment Tab.* If multiple e-mail addresses exist for the profile, the system prompts with a listing of all e-mail addresses and allows you to select more than one e-mail, providing you with the ability to send these trip documents to multiple e-mail addresses at one time. The profile's primary e-mail address is selected by default. Specific e-mail addresses from the listing can be checked individually, or Select All can be checked to send to all e-mail addresses within the profile.

Make sure to create a mailer, so a record of the mailing is present in the Res Card and Client Profile.

Generate an Itinerary



To print out an itinerary for a client, click the *Itinerary* icon on the Res Card toolbar.

Select the Format from drop-down: *Itinerary No Pricing, Day-by-day Sorted by Depart and Arrive, or Day-by-day Sorted by Depart Only.* The *Day-by-day Sorted by Depart Only* sorts the entire itinerary across all Reservations and Service Provider records based upon departure dates. All arrival information is included within the details of each itinerary item. This format provides a seamless method for printing a detailed itinerary for your clients to include with your trip proposals or with documentation prior to departure. A template format is generated that provides you with the ability to customize these reports even further including the ability to paste graphics or additional comments and descriptions.

Click *Include Itin/Invoice Remarks* if you want these to appear. Click *Branch/Profile Remarks* to select from a table of branch level remarks set up specifically for Res Card Itineraries. Pick from tables of Branch, Agent, Vendor, or Client remarks. Check off the remark/s to use with this particular itinerary, and then *OK*.

Notes:

- Vendor remarks do not print on the *Day-by-day Itinerary* formats.
- Branch and Profile Remarks have been setup by the database administrator, but Agent, Vendor, and Client Remarks can be setup in any Agent, Vendor, and Client Profile by clicking on the *Res Card Remark* tab inside the profiles. Vendor remarks appear under the Vendor level reservation data after vendor level Itin/Invoice remarks. At the end of the invoice, remarks appear in this order: *Branch Remarks, Insurance Waiver, Client,* and *Agent Remarks.*

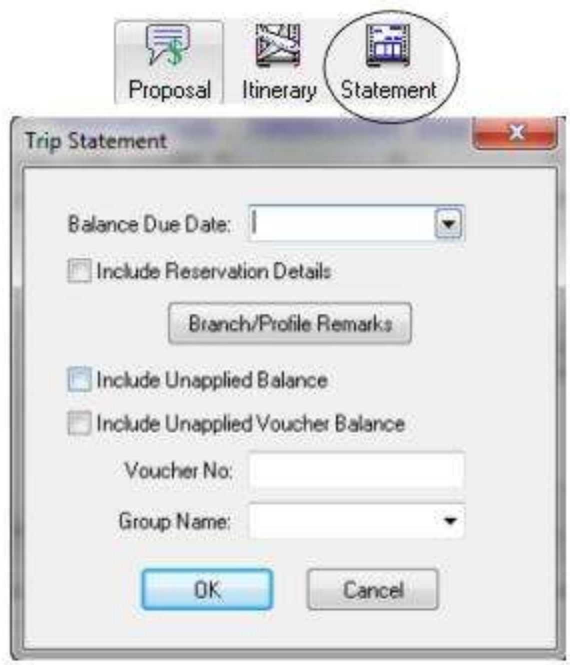
Once an itinerary has been generated, it appears in a word processor. Change the font, insert graphics and customize the itinerary.

To e-mail the itinerary, click the *E-mail* icon to send the itinerary in text format. If multiple e-mail addresses exist for the profile, the system prompts with a listing of all e-mail addresses and allows you to select more than one e-mail, providing you with the ability to send these trip documents to multiple e-mail addresses at one time. The profile's primary e-mail address is selected by default. Specific e-mail addresses from the listing can be checked individually, or Select All can be checked to send to all e-mail addresses within the profile.

By viewing in *Word,* use the spell check feature or do additional formatting. (This feature requires MS Word 2000 or Word XP installed on each workstation running *ClientBase*). Click *Attach* to automatically generate a .pdf version of the document you are viewing and attach it as a file to the Res Card you are working in. This gives you the ability to create a permanent record of an Trip Proposal as it appeared at the time of generating it, including any customization, formatting etc. Go to the *Attachments* tab of the Res Card to access or print any of these attached files.

Make sure to create a mailer, so a record of the mailing is present in the Res Card and Client Profile.

Generate a Trip Statement



To print out a trip statement for a client, click the *Statement* icon in the Res Card toolbar.

Balance Due Date: Insert a date manually or double-click a date on the calendar from the drop-down menu to include on the Trip Statement.

Include Reservation Details: Check here for a more detailed summary of the reservation to print on the Trip Statement. This includes itemization (if captured) and a one-line summary for each Service Provider Record.

Branch/Profile Remarks: Click *Branch/Profile Remarks* to select from a table of branch level remarks set up specifically for Res Card *Trip Statements*. Pick from tables of Branch, Agent, Vendor, or Client remarks. Check off the remark/s to use with this particular document, and then *OK*.

Note: Branch and Profile Remarks have been setup by the database administrator, but Agent, Vendor, and Client Remarks can be setup in any Agent, Vendor, and Client Profile by clicking on the *Res Card Remark* tab inside the profile. Vendor remarks appear under the Vendor level reservation data after vendor level Itin/Invoice remarks. At the end of the invoice, remarks appear in this order: *Branch Remarks, Insurance Waiver, Client,* and *Agent Remarks.*

Include Unapplied Balance and Include Unapplied Voucher Balance: Check if you want these to appear on trip statement.

Input Voucher No. or Group Name: Enter if applicable, and click *OK.* Once a trip statement is generated, it appears in a word processor. Change the font, insert graphics and customize the trip statement.

To e-mail the trip statement, click the *e-mail* icon. This feature works for both the MAPI and SMTP methods for sending e-mails and e-mails the trip statement in a form of text. If multiple e-mail addresses exist for the profile, the system prompts with a listing of all e-mail addresses and allows you to select more than one e-mail, providing you with the ability to send these trip documents to multiple e-mail addresses at one time. The profile's primary e-mail address is selected by default. Specific e-mail addresses from the listing can be checked individually, or Select All can be checked to send to all e-mail addresses within the profile.

Make sure to create a mailer, so a record of the mailing is present in the Res Card and client Profile. Run a spell check in *Word* or do additional formatting, by clicking the *View in Word* icon. This feature requires MS Word 2000/Word XP versions or above installed on each workstation running *ClientBase*. Click *Attach* to automatically generate a .pdf version of the document you are viewing and attach it as a file to the Res Card you are working in. This gives you the ability to create a permanent record of an Trip Proposal as it appeared at the time of generating it, including any customization, formatting etc. Go to the *Attachments* tab of the Res Card to access or print any of these attached files.

Note: The *Reference to the Trip Statement* field includes the client's profile number/Res Card number. For example, Reference: 2398/590 would represent a Statement for Client # 2398 and Res Card # 590.

Using the Trip Statement after Creating a Receipt: In cases where you are not yet ready to issue an invoice, but have received money from a client, possibly for a gift certificate or payment between deposit and final payment or payment before confirming something, a Receipt can be issued in the Client Profile giving the agent a new tool for printing a document for the customer and receipting the payment as a Voucher on the client's account in *Trams Back Office*.

Chapter 13: An In-Depth Look at Live Connect

This chapter provides a detailed overview of using the Live Connect feature in ClientBase.

Introduction

One of the most innovative features in *ClientBase* is Live Connect which is found 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, generate invoices and trip statements. (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*.) *ClientBase* continues to add more on-line booking engines to connect to via Live Connect. As each Live Connect Provider may require unique setup and usage, each Provider has been added here with specific directions for its setup and usage.

Live Connect Reminders

For each of the Live Connect Providers listed below, upon bringing reservations details into a *ClientBase* Res Cards via Live Connect, two reminders may be created - one for Deposit Due the Vendor, and one for Final Payment Due the Vendor. These reminders are created automatically and cannot be turned off. They appear in the Res Card and Client Profiles under *Activities* tab, and will also show up on the agent's to-do list the dates for which the reminders were scheduled. (Agent can always go in to modify the dates of these reminders, if they want some leeway in contacting the client first before using these as a reminder to pay the vendor.)

Live Connect Provider's Website without HTTPS

If you connect to a Live Connect Provider that doesn't use HTTPS, you will get an warning message before connecting: ***This is not a secure site, therefore payment data and login data should not be automatically passed.* Choose to *Cancel, Send Client Data without Login or Payment Info,* or *Pass All Client and Agency data.***

Live Connect Provider Tech Updates

If you are having an issue with a particular Live Connect Provider, check our website here for a quick review of the issue:

http://www.trams.com/home/support/live_connect_tech_updates/

We immediately post Live Connect issues with possible workarounds on this site, as well as delete the issue when it has been resolved.

AFCNET

If you are not currently registered to book AFCNET on-line, go to **www.afcnet.com/profile.php** to enroll. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up AFCNET Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Set up a Live Connect Provider for AFCNET (or check if there is one) by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type AFCNET.

URL: Type **http://www.afcnet.com/login.php**

Travel Category: Select *Air* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select AFCNET from the drop-down list.

User Name and Password: Enter the necessary fields based upon the login information provided to you when you contacted AFCNET. (The Agency Number and Code is not applicable.)

Set Up Individual Agent Login Information: Each user can set up their own logins by going to **Utilities|My Login|Live Connect.** Click *Add* and enter the following information:

Live Connect Provider: Select AFCNET from the drop-down list.

User Name and Password: Enter the necessary fields based upon the login information provided to you when you contacted AFCNET. (The Agency Number and Code is not applicable.)

Step 3) Retrieve the AFCNET vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *AFCNET* booking engine from the drop-down list. The Vendor Code is 24526036. In the *Travel Category* profile field, select *Air* from the drop-down menu.

Live Connect Features Supported by AFCNET

AFCNET supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase.*

__ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

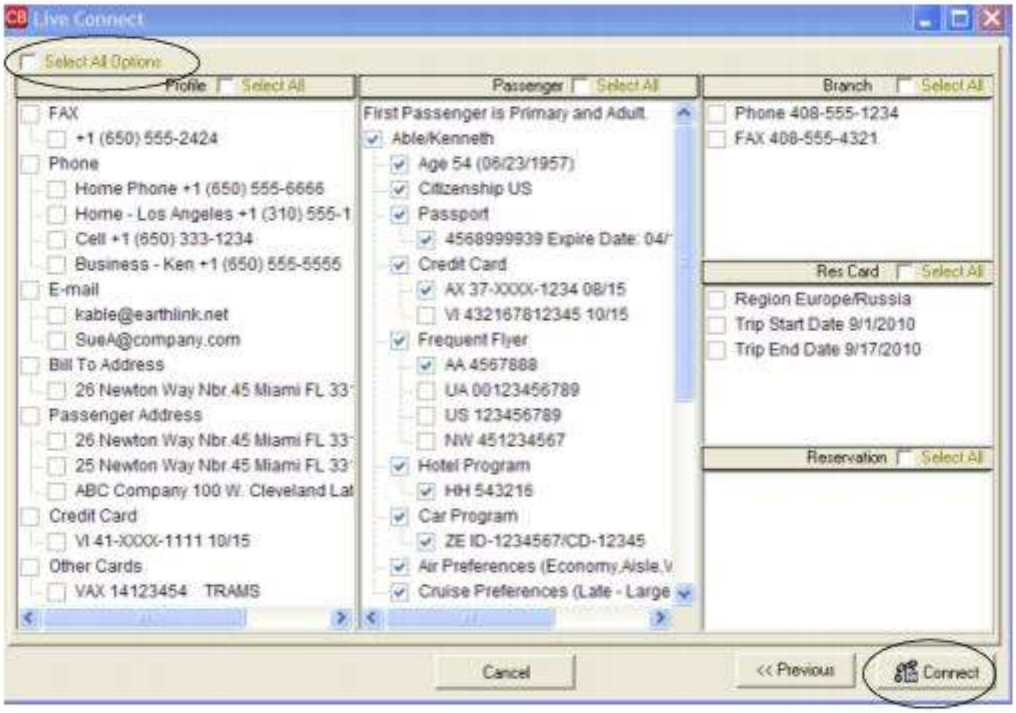
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect.*

Step 3) Select the AFCNET from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the AFCNET reservation. (This information is not sent to AFCNET, but can be copied and pasted into reservation fields from top of launch screen.) Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the AFCNET booking site. Complete the reservations using instructions supplied by AFCNET upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in the website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

All About Travel

Sign up with All About Travel at www.allabouthawaii.com and click the *Agent Login* tab. Click the link for *Don't have a password yet*. Fill out the forms and fax them back to us, or call us at 1-800-274-8687 and Press 9.

Set Up All About Travel

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for All About Travel if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter All About Travel.

URL: Enter **https://www.allabouthawaii.com/*trams*/*clientbase*.rescard**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select All About Travel from the drop-down list.

User Name, Password, Account Number: Enter your User Name, your password and your ARC number as the Account Number.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Step 3) From the Profile Manager, retrieve the All About Travel profile (or create if not in database). From the General Info tab, click *Live Connect Providers*. Click *Add*, then select All About Travel from the drop-down list. The vendor code is blank. Click *OK*.

Live Connect Features Supported by All About Travel

All About Travel supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

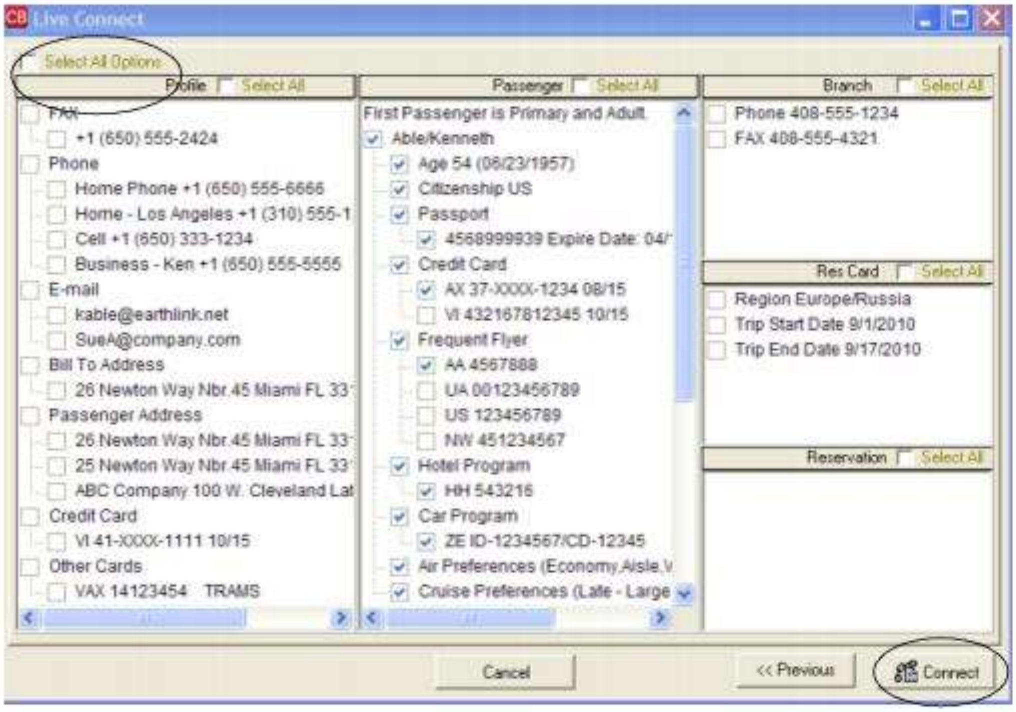
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New All About Travel Reservation

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect*.

Step 2) Click *Create New Reservations*.

Step 3) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the All About Travel booking site. Complete the reservations using instructions supplied by All About Travel when you registered. If you have not received these instructions, call 1-800-274-8687 and Press 9. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in *ClientBase*.

Import Existing All About Travel Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in All About Travel website, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the *ClientBase* reservation record.

Allianz Travel Insurance - Website

To use Live Connect to purchase trip insurance with Allianz Global Assistance, you must be licensed to sell Allianz Travel Insurance. If you are not currently licensed to sell Allianz Travel Insurance - Website, navigate to http://www.allianztravelinsurance.com and click on the ***Become a Partner*** link from the home page.

Set Up Allianz Travel Insurance

Upon receiving your account number, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new Live Connect Provider for Allianz Travel Insurance - Website (if none exists) by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Enter Allianz Travel Website

URL: Enter **https://www.allianztravelinsurance.com/*Trams*.aspx**

Travel Category: Select *Insurance* from the drop-down.

Import XML from: Select *HTML Source.*

Click *OK* to save.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same Account Number and Agency Code), or individually (if agents have individual Logins and Passwords). When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login.** Click *Add* and enter the following information:

Select Allianz Travel as the **Live Connect Provider.** Enter the agency **Account Number** and you must enter ACCAM as the **Agency Code**. Click *OK*.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add* and entering the information in one of 3 ways:

Option 1: Select Allianz Travel as the **Live Connect Provider.** Enter your Login name as the **User Name;** enter your **Password**; enter the agency **Account Number** and you must enter ACCAM as the **Agency Code**.

Option 2: Select Allianz Travel as the **Live Connect Provider.** Enter your Login name as the **User Name** and enter your **Password.**

Option 3: Select Allianz Travel as the **Live Connect Provider.** Enter your agency **Account Number** and you must enter ACCAM as the **Agency Code**.

Step 3) Create a vendor profile in *ClientBase* for Allianz Travel Insurance - Website. From the Profile Manager, retrieve the Allianz Travel Insurance - Website vendor profile (or create one). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, and select the desired booking engine (Allianz Travel Insurance - Website) from the drop-down list. The vendor code is left blank. Click *OK* to save.

Allianz Travel Insurance - Live Connect Features

Allianz Travel Insurance - Website supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

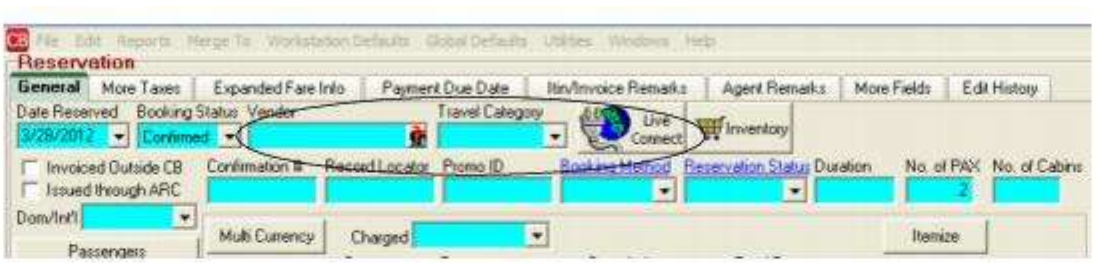
__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Allianz Travel Insurance - Website Reservation

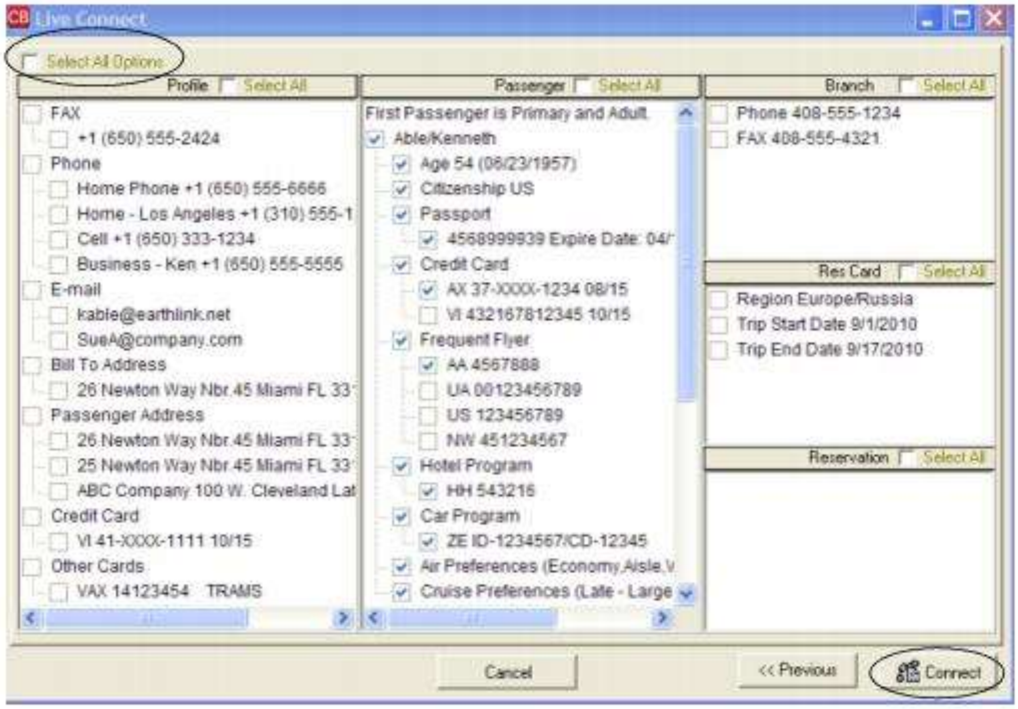
Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) In the Res Card after entering, click the *Reservation* Tab and *Add*. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect*.

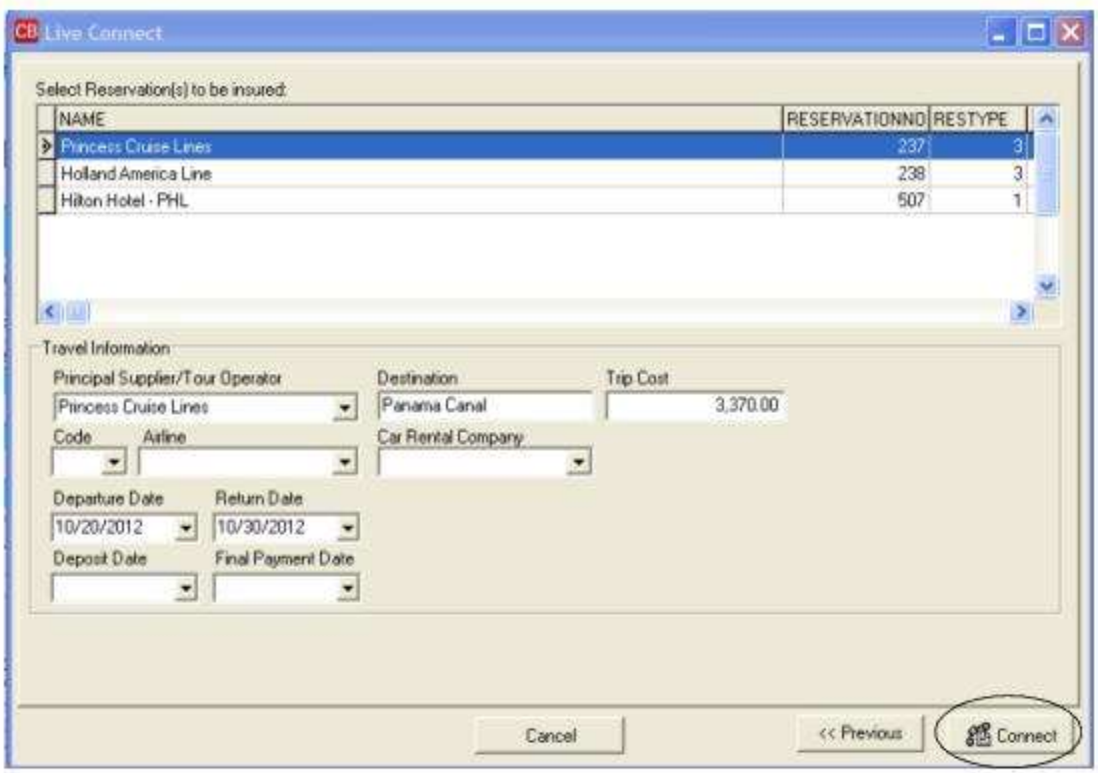


Step 3) Select Allianz Travel Insurance - Website from the drop-down menu by *Connect To* (if not already selected), and then click *Create New Reservations:*

Step 4) Select any customer information for use to book the Allianz Travel Insurance - Website reservation. This data is automatically passed to Allianz Travel Insurance - Website and saves time during the booking process, as less fields need to be completed manually. Click *Next*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process, as less fields need to be completed manually. Any missing or incomplete data can be updated on the Allianz Travel Insurance - Website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.

All reservation data booked on-line is now located in the reservation fields in *ClientBase*. If you need help with the Allianz Travel Insurance - Website, please contact the Sales Support team at 855-524-3687.

Amadeus AgentNet VAX

If your agency uses the Amadeus AgentNet site to book VAX (Vacation Access) reservations including Agentnet VAX - Dynamic, launch Amadeus AgentNet VAX through the *ClientBase* Live Connect, and benefit from the seamless passing of customer information and importing of reservation data to your database AND continue to get your AgentNet booking credits/ incentives accordingly. To use AgentNet with Live Connect in *ClientBase*, use the AgentNet user login and password supplied by Vacation.com or Amadeus. If you need one and are a Vacation.com member, obtain user login information by contacting Vacation.com Member Services at 800-843-0733. Otherwise contact an Amadeus Sales Representative.

Set Up Amadeus AgentNet VAX

Once you have all login information, setup *ClientBase*.

Step 1) Create a Live Connect Provider for Amadeus AgentNet VAX if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

> **Provider Name:** Enter Amadeus AgentNet VAX.
>
> **URL:** Enter **https://amadeus.agentnet.com/anet/thirdparty/gotrisept.jsp?**
>
> **Travel Category:** Enter Tour from the drop-down menu.
>
> **Import XML from:** Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>**Set Up Global Agent Login Information:**</u> To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login.** Click *Add* and enter the following information:

> **Live Connect Provider:** Select Amadeus AgentNet VAX from the drop-down list.
>
> **User Name/Password:** Amadeus AgentNet VAX only passes the Username and Password. Enter the necessary fields based upon the login information provided to you when you enrolled.

<u>**Set Up Individual Agent Login Information:**</u> **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Amadeus AgentNet VAX from the drop-down list.

User Name/Password: Amadeus AgentNet VAX only passes the Username and Password. Enter the necessary fields based upon the login information provided to you when you enrolled.

Step 3) Next, set up vendor profiles. Retrieve each vendor profile to book through VAX (or create a new vendor profile) and in the General Info Tab, click *Live Connect Providers*. From here click *Add* and specify Amadeus AgentNet VAX Dynamic as the booking engine and enter the unique vendor identifier.

.

If you are using both Amadeus AgentNet VAX and Amadeus AgentNet VAX - Dynamic, you must make two entries.)

Amadeus Agentnet VAX Dynamic Participating Vendors & Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
BST	Blue Sky Tours	Amadeus AgentNet VAX - Dynamic
FJ1	Funjet Vacations	Amadeus AgentNet VAX - Dynamic
GP1	Grand Pineapple Beach Resorts	Amadeus AgentNet VAX - Dynamic
MMT	MGM Mirage Vacations - Air/Hotel	Amadeus AgentNet VAX - Dynamic
SAB	Sandals and Beaches Resorts	Amadeus AgentNet VAX - Dynamic
STN	Showtime Tours of Nevada	Amadeus AgentNet VAX - Dynamic
WNT	Southwest Airlines Vacations	Amadeus AgentNet VAX - Dynamic
TPV	TNT Vacations powered by Funjet	Amadeus AgentNet VAX - Dynamic
AMW	US Airways Vacations	Amadeus AgentNet VAX - Dynamic
VE1	Vacation Express	Amadeus AgentNet VAX - Dynamic

Amadeus AgentNet VAX Features

Amadeus AgentNet VAX supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Populates booking engine with User Login data and profile data from *ClientBase.*

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

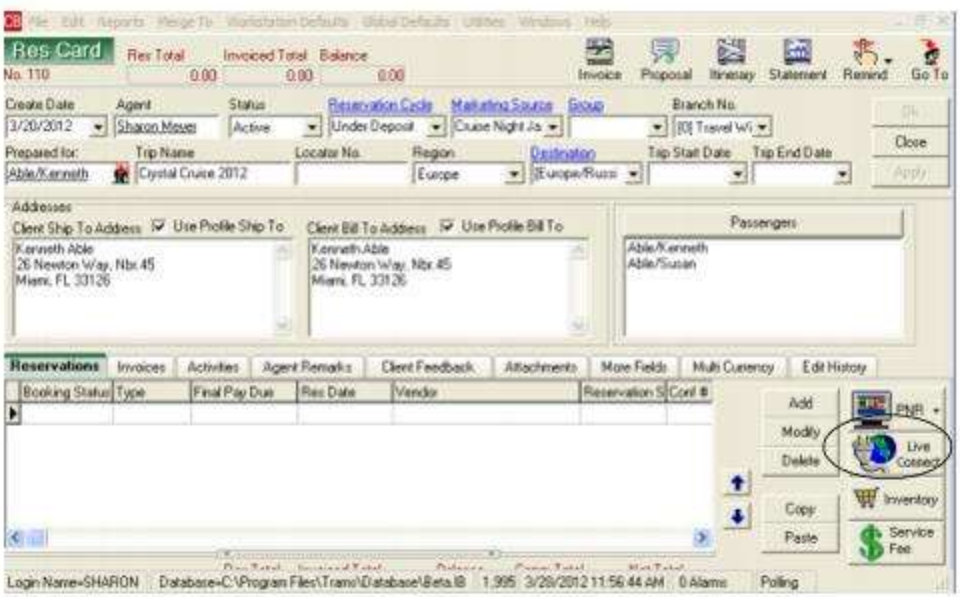
✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Amadeus AgentNet VAX Reservation

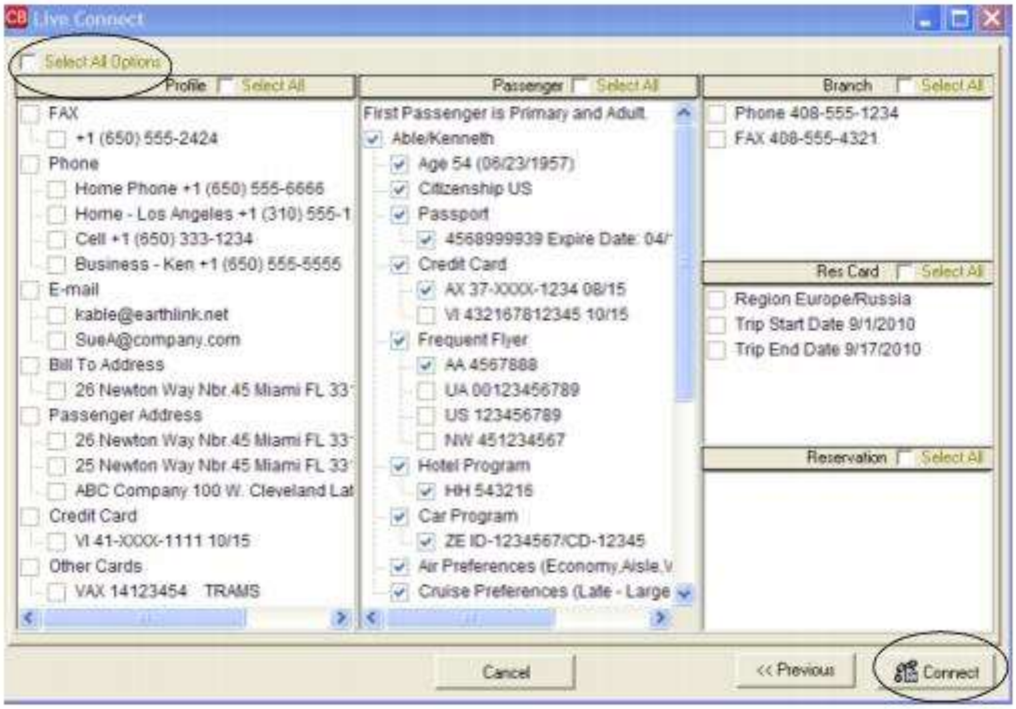
Step 1) When ready to book on-line, create a client's Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name Fields*, and select the travelers.

Step 2) If you do not know the vendor you are using, click the *Live Connect* button in the lower right hand corner of the main Res Card screen to launch Amadeus AgentNet VAX from the Res Card level.



If you do know the vendor you are booking, use the *Add Reservation* button to start a new reservation. Fill in the *Vendor* and *Travel Category* and *Live Connect*, and then *Create New Reservation*.

Step 3) Select customer data to book the reservation *(Traveler, Credit Card*, *Phone,* and *Billing Address),* click *Connect:*



Step 4) Although still in *ClientBase*, you are now on-line at the Amadeus AgentNet VAX booking site. Complete the reservations using instructions supplied by Amadeus AgentNet VAX.

Step 5) Upon completion of the reservation, click *Import Reservation*, and all reservation details are imported back into the *ClientBase* reservation record.

Import Existing Reservation Made Outside of *ClientBase*

Method 1) First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number if known, or leave blank. If a confirmation number is entered, the system automatically retrieves and imports the reservation. If not known, when in Amadeus Agentnet VAX - instead of creating a new reservation, click the retrieve reservation area to locate reservation.

Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Method 2) Create a new reservation and click *List Reservations.* Highlight the reservation to import and click *Import* to bring details into the reservation in *ClientBase*. (Usually the listing of reservations takes a while, particularly if a lot of reservations have been booked for that vendor.)

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled on-line is now located in the reservation fields in *ClientBase*.

Amadeus Cruise

Any *ClientBase* customer, regardless of GDS, is welcome to use Amadeus Cruise free of charge to book cruises using Live Connect. If you are not currently registered to book Amadeus Cruise on-line, call 1-888-AMADEUS, or e-mail **salesinquires@amadeus.com**. (Current Amadeus Cruise users may contact your Amadeus Account Manager.) Upon registering you are provided with Amadeus Agent Signs and Duty Codes, and are directed to download one file from the Amadeus Cruise website (version must be 3.4 or higher). Since this particular Live Connect provider is half web/half client application, this file is required to connect to Amadeus Cruise in a *ClientBase* Live Connect reservation.

Set Up Amadeus Cruise

Upon receiving Amadeus Agent Signs and Duty Codes, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Amadeus Cruise if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Amadeus Cruise.

URL: Enter **http://us.amadeuscruise.com/cruise.asp?**

If you experience problems with this URL, use this one instead:

http://us.amadeuscruise.com/deprecated/cruise.asp?

Travel Category: Enter Cruise from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select Amadeus Cruise from the drop-down list.

Agent Sign: Enter the unique Amadeus Cruise assigned agency user name.

Duty Code: Enter the unique assigned agency code.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Amadeus Cruise to connect to the cruise booking engine, then complete the remaining fields, and save.

Agent Sign: Enter the unique Amadeus Cruise assigned agency user name.

Duty Code: Enter the unique assigned agency code.

Step 3) When you registered, Amadeus Cruise provided a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify Amadeus Cruise as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add*. Select *Amadeus Cruise* from the drop-down menu and enter the *Amadeus Cruise* vendor code. First click Live Connect Providers and Add. Select Amadeus Cruise from the drop-down menu and enter the Amadeus Cruise vendor code.

Amadeus Cruise Participating Vendors & Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***

AZA	Azamara	Amadeus Cruise
CCL	Carnival Cruise Lines	Amadeus Cruise
CEL	Celebrity Cruises	Amadeus Cruise
CST	Costa Cruise Lines	Amadeus Cruise
CUN	Cunard	Amadeus Cruise
FOL	Fred Olsen	Amadeus Cruise
HAL	Holland America Lines Westours	Amadeus Cruise
MSC	MSC Cruises	Amadeus Cruise
NCL	Norwegian Cruise Lines	Amadeus Cruise
OCL	Oceania	Amadeus Cruise
OVL	Ocean Village	Amadeus Cruise
POC	P&O	Amadeus Cruise
PCL	Princess Cruises	Amadeus Cruise
RCC	Royal Caribbean International	Amadeus Cruise
SBN	Seabourne Cruise Lines	Amadeus Cruise

Amadeus Cruise Features

Amadeus Cruise supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

- ✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

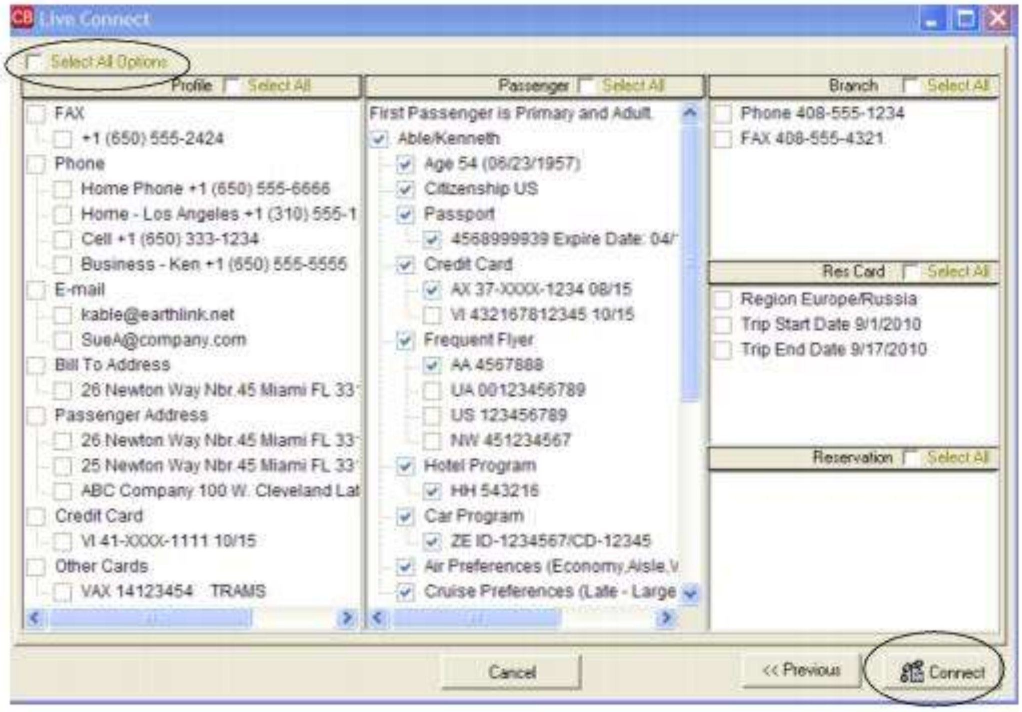
Create Amadeus Cruise New Reservation

Step 1) When ready to book on-line, create a client's Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name Fields*, and select the travelers.

Step 2) If you do not know the vendor you are using, click the *Live Connect* button in the lower right hand corner of the main Res Card screen to launch Amadeus Cruise from the Res Card level.

If you do know the vendor you are booking, use the *Add Reservation* button to start a new reservation. Fill in the *Vendor* and *Travel Category* fields, click *Live Connect*, and then *Create New Reservation*.

Step 3) Select customer data to book the reservation *(Traveler, Credit Card*, *Phone,* and *Billing Address),* click *Connect:*



Step 4) Although still in *ClientBase*, you are now on-line at the Amadeus Cruise booking site. Complete the reservations using instructions supplied by Amadeus Cruise.

Step 5) Upon completion of the reservation, click the yellow end transaction symbol (at least twice) and then *Import Reservation*, and all reservation details are imported back into the *ClientBase* reservation record.

Note: If insurance is part of the record, a separate Service Provider record is created for it.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation*. Enter the confirmation number if known, or leave blank. If a confirmation number is entered, the system automatically retrieves and imports the reservation. If not known, when in Amadeus Cruise, click the retrieve reservation area to locate reservation. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase* reservation record.

American Express Vacations

You need to be an American Express agency to use American Express Vacations Live Connect.

Set Up American Express Vacations

Step 1) American Express Vacations uses the Travel Impressions Live Connect Provider. Create a new or check that a Live Connect Provider for Travel Impressions exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter Travel Impressions.

URL: https://quest.travimp.com/phase1/agents.html

Travel Category: Select Tour from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) User Login Data does not populate in Live Connect so no set up is required, but create a vendor profile in *ClientBase* if one does not exist. From the profile manager, retrieve the *American Express Vacations* vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select Travel Impressions from the drop-down list. The vendor code is left blank. Click *OK*.

American Express Vacations Features

American Express Vacations supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- __ Populates booking engine with User Login data from *ClientBase*.
- __ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

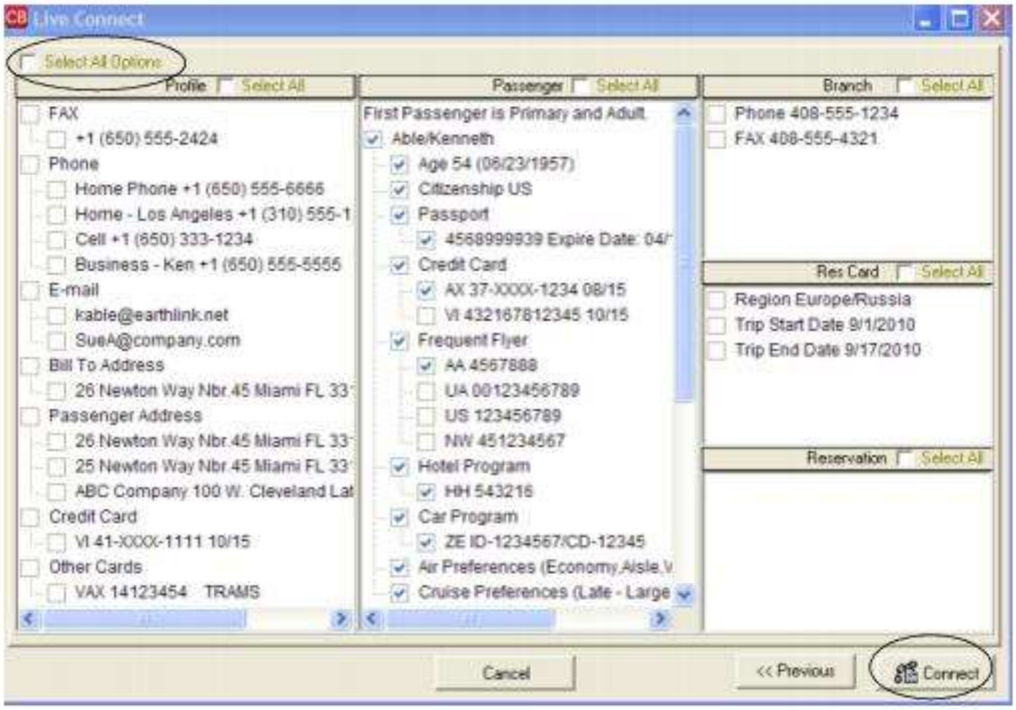
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New American Express Vacations Reservation

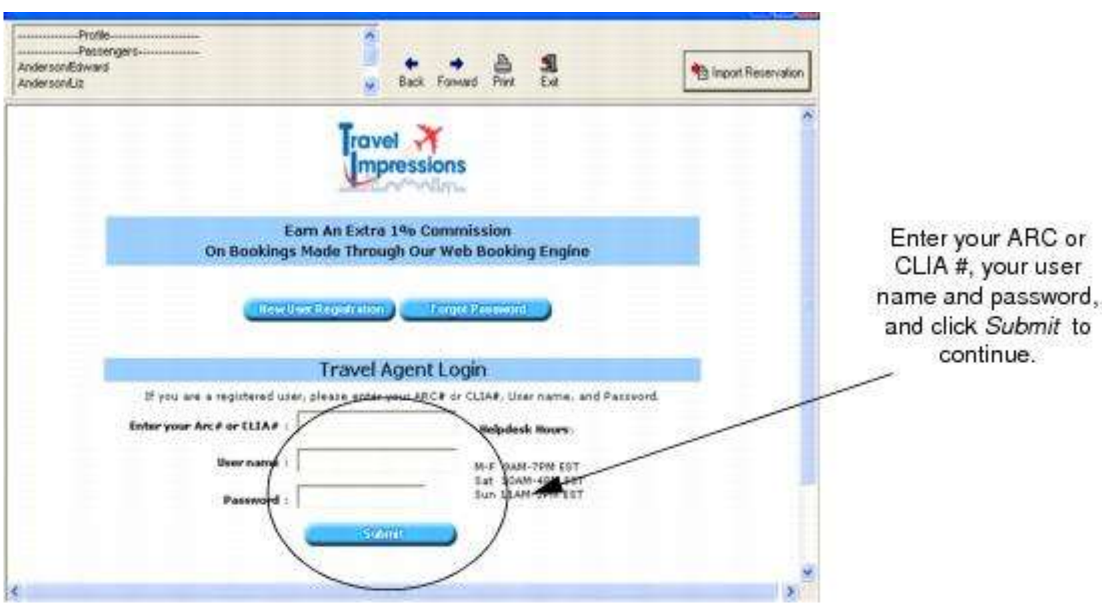
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the *Vendor* (American Express) and *Travel Category* then click *Live Connect*.

Step 2) Select American Express Vacations from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the American Express Vacations reservation. This data is **NOT** passed to American Express Vacations, but you are able to view it at the top of your booking screen and can highlight it, copy, and paste it into the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. A page appears which verifies your ARC or CLIA #, User Name, login, and password the first time you sign in (and is pre-populated with this data thereafter).



Create the booking by clicking *Make a Reservation* with all traveler information (none is passed to site through *ClientBase*, but you can highlight, copy and paste information at top of screen into booking fields) and when the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation*. Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in American Express Vacations website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Apple Vacations

If you are not currently registered to book Apple Vacations on-line, go to

http://qa-bookonline.applevacations.com/ to download the electronic booking contract. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*

Set Up Apple Vacations

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Apple Vacations if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Apple Vacations.

URL: Enter **https://abe.applevacations.com/abe/TramsInterface**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select Apple Vacations from the drop-down list.

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you when you contacted Apple Vacations (Account Number not applicable).

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Apple Vacations from the drop-down menu, then complete the remaining fields, and save.

User Name/Password: Enter the User Name and Password provided to you when you contacted Apple Vacations.

Account Number: Not applicable.

Step 2) Retrieve the Apple Vacations vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Apple Vacations* booking engine from the drop-down list. The Vendor Code is left blank.

Apple Vacations Features

Apple Vacations supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

_Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record. **Note: Does not send Agency Commission.**

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

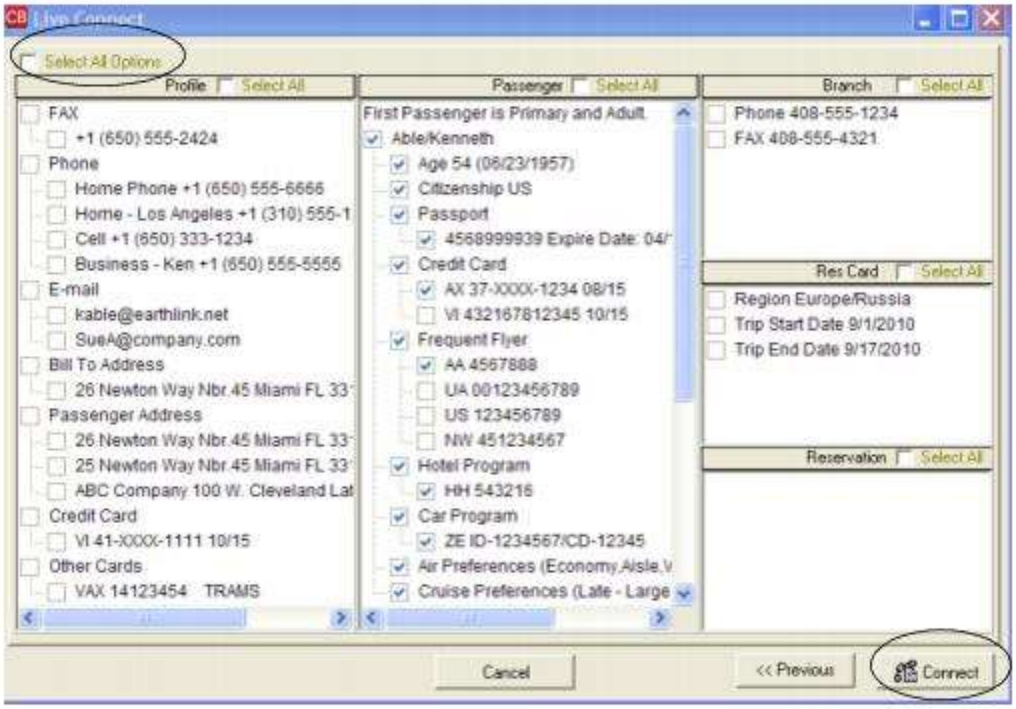
Create New Apple Vacations Reservation

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor and Travel Category* fields and then click *Live Connect.*

Step 3) Select the Apple Vacations from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Apple reservation. This data is **NOT** passed to Apple Vacations, but you are able to view it at the top of your booking screen and can highlight it, copy, and paste it into the booking fields to save you time during the booking process. Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Apple Vacations booking site. Complete the reservations using instructions supplied by Apple Vacations upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line (except Agency commissions) is now located in the reservation fields in *ClientBase*.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number if known, or leave blank. If a confirmation number is entered, the system automatically retrieves and imports the reservation. If not known, when in Apple Vacations, instead of creating a new reservation, go to the retrieve reservation area. Enter the confirmation number and press *Go.* You may be asked to okay another dialog box before you are able to press the *Import* button in the upper right-hand corner once the reservation details are showing. The details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled on-line is now located in the reservation fields in *ClientBase*.

Auto Europe

To use Live Connect to sell Auto Europe, you must be an Auto Europe appointed agency and establish user logins and passwords for selling Auto Europe on-line. If are not already registered, visit http://www.AutoEurope.com/global-agent-signup.cfm

to sign up online, or call your Auto Europe sales representative for more assistance. You need to provide your company address information and your IATA or CLIA number when completing this form. After you have submitted the form, Auto Europe will contact you to provide a Global Agent User Account number and a Global Agent Password which you need to set up Live Connect in *ClientBase*

Set Up Auto Europe

Step 1) Create a Live Connect Provider for Auto Europe if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Auto Europe.

URL: Enter **https://www.autoeurope.com/global-agent/*Trams*.cfm**

Travel Category: Enter Car from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user ID and password), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click Add and enter the following information:

Live Connect Provider: Select Auto Europe from the drop-down list.

User Name, Password and Account Number: In the User ID field, enter the user name and password provided by Auto Europe when you signed up. The *Account Number* field in *ClientBase* is left blank.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Auto Europe to connect to its booking engine.

User Name, Password and Account Number: In the User ID field, enter the Account Number provided by Auto Europe when you signed up. Enter the password provided you by Auto Europe. The *Account Number* field in *ClientBase* is left blank.

Click *OK* to save.

Step 3) Create a vendor profile in *ClientBase* if one does not exist. From the profile manager, retrieve the Auto Europe vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, and select Auto Europe from the drop-down list. The vendor code is left blank. Click OK to save.

Auto Europe Features

Auto Europe support the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase.*

✓ Populates booking engine with profile data from *ClientBase.*

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

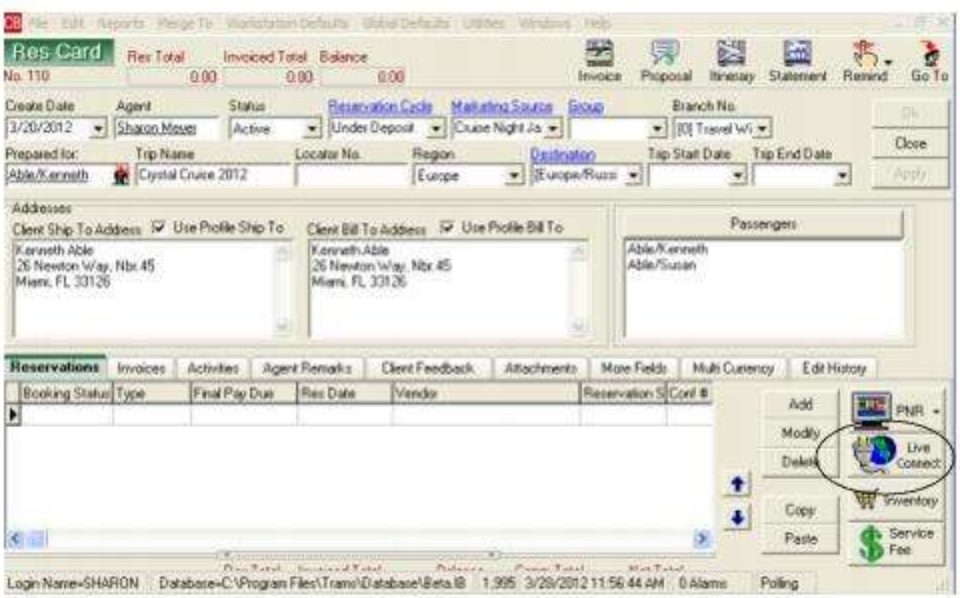
__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Auto Europe Reservation

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

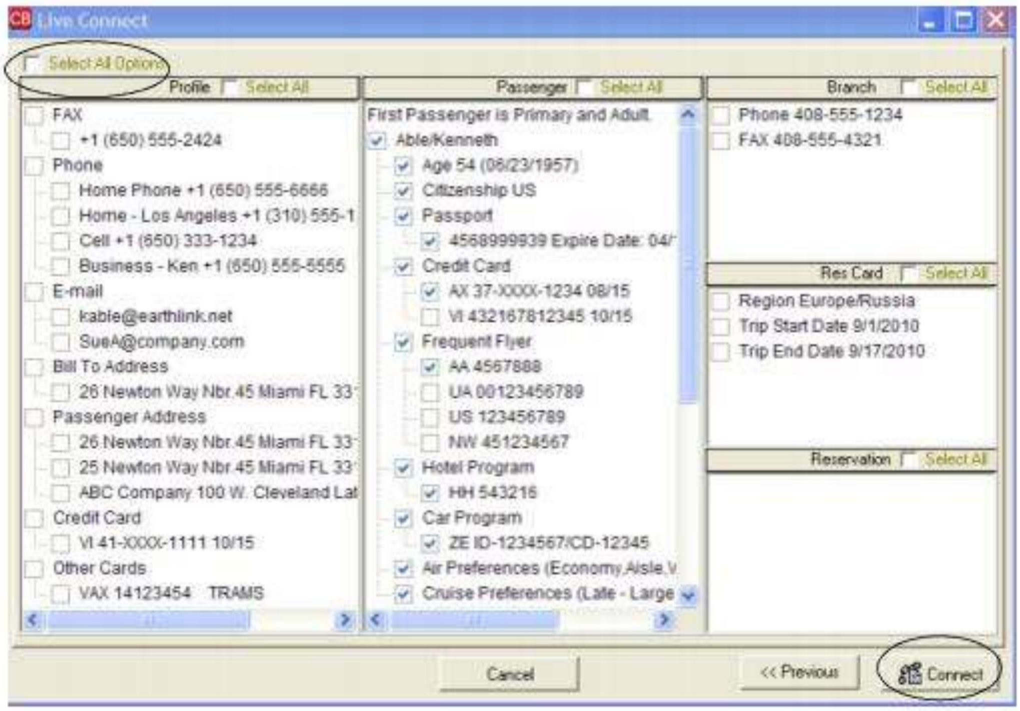
Step 2) If you do not know the cruise vendor you are using, click the *Live Connect* button in the lower right hand corner of the main Res Card screen to launch Auto Europe from the Res Card level.



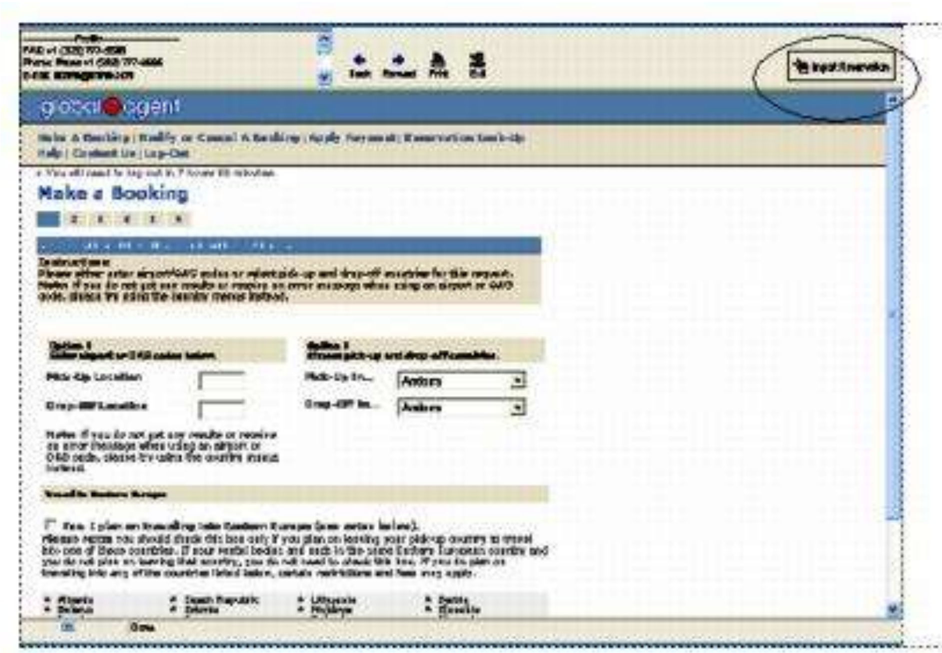
If you do know the vendor you are booking, use the *Add Reservation* button to start a new reservation. Fill in the *Vendor and Travel Category* fields and then click *Live Connect.*

Step 3) Select the from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 5) Although still in *ClientBase*, you are on-line at the Auto Europe booking site. Complete the reservations using instructions supplied by Auto Europe upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



Avanti Destinations

If you are not currently registered to book with Avanti Destinations, go to www.avantidestinations.com to register as an agent or agency. On the homepage, click *Agent Resources* for registration links and information.

Set Up Avanti Destinations

Upon receiving login information, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Avanti Destinations if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Avanti Destinations.

URL: Enter **https://www.avantidestinations.com/EVWeb/DirectConnect.jsp**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name and password), or with an individual username and password (username is email address). When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select Avanti Destinations from the drop-down list.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Avanti Destinations.

Account Number: N/A.

Agency Code: N/A.

Set Up Individual Agent Login Information: Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Avanti Destinations from the drop-down list.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Avanti Destinations. User name is e-mail address and your selected password.

Account Number: N/A

Agency Code: N/A

Step 3) Create a vendor profile in *ClientBase* for Avanti Destinations if one does not exist. From the profile manager, retrieve the Avanti Destinations vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Avanti Destinations from the drop-down list. The vendor code is left blank. Click *OK*.

Avanti Destinations Features

Avanti Destinations supports the following Live Connect Features if checked off:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

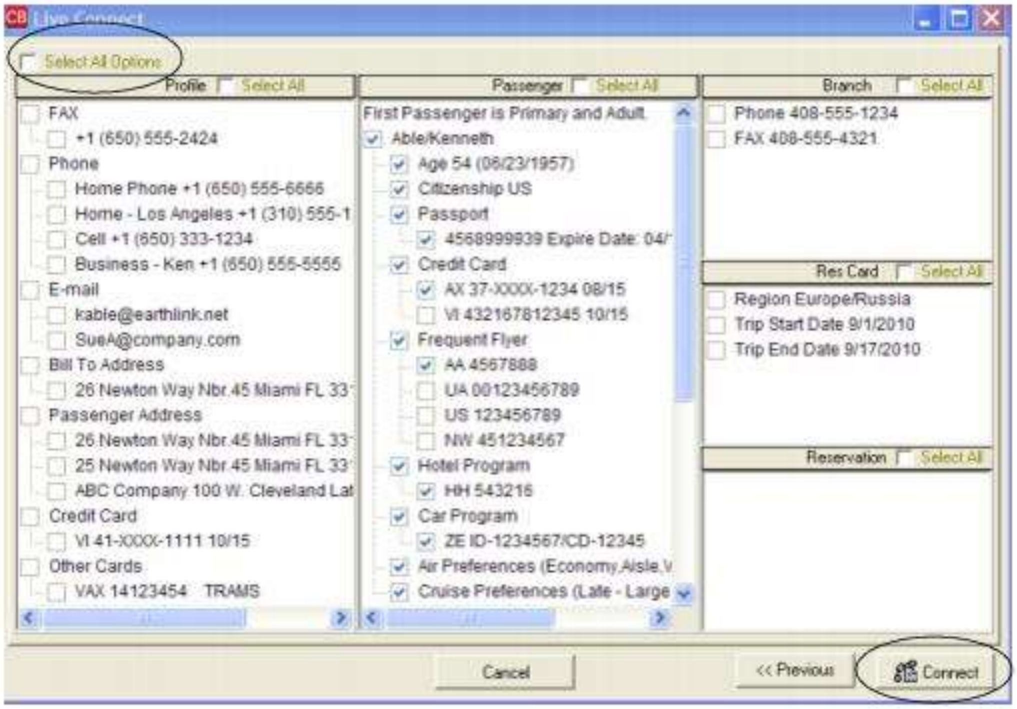
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Avanti Destinations Reservation

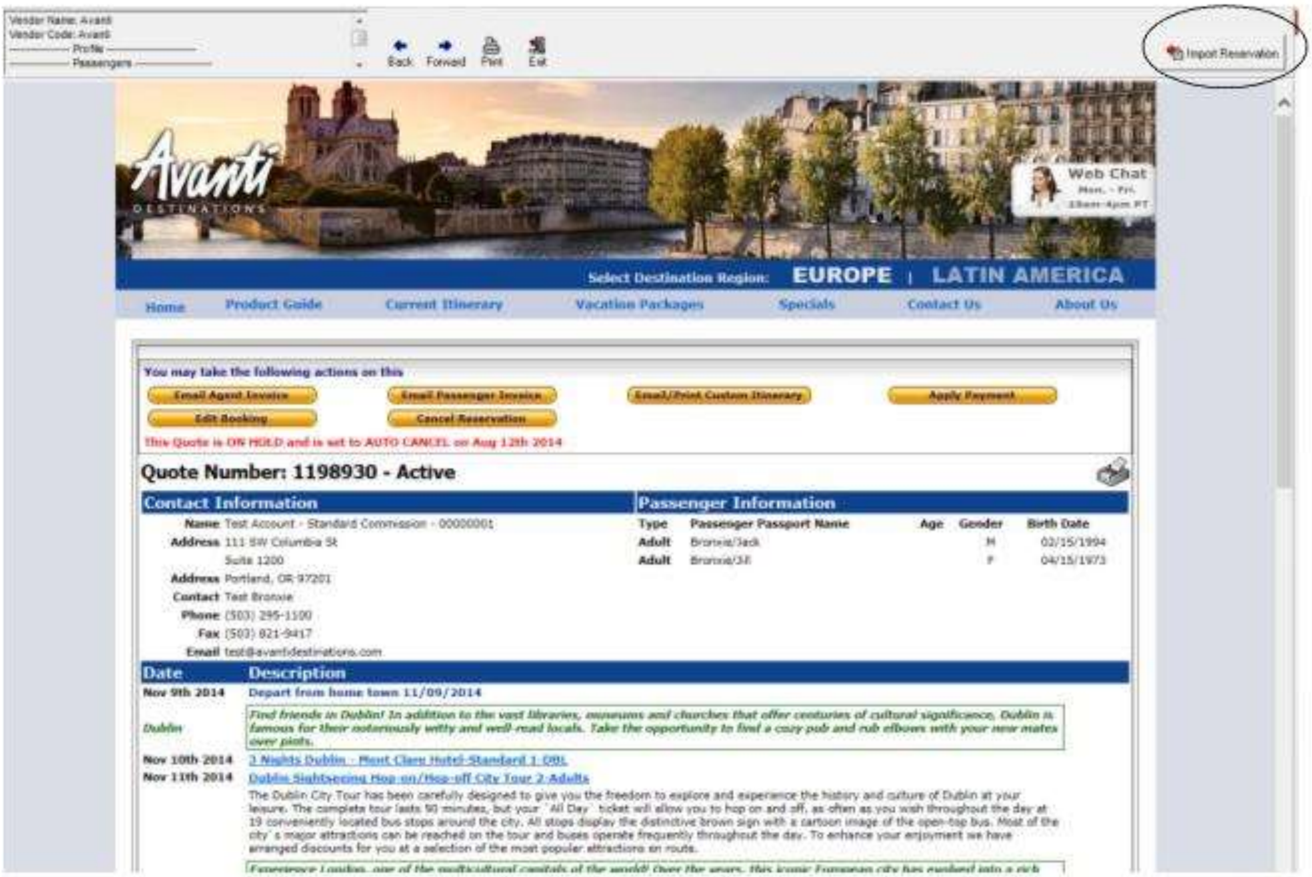
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Select Avanti Destinations as the vendor, fill in the Travel Category if blank, and then click *Live Connect* if it doesn't automatically appear.

Step 2) Select Avanti Destinations from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the reservation. This data is automatically passed to Avanti Destinations and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations using instructions supplied by Avanti Destinations. When the reservation is confirmed as complete, click *Import Reservation.* All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



To resolve questions about Avanti Destinations and ClientBase Windows, please contact the Avanti Director of Marketing or Sales & Marketing Assistant at **marketing@avantidestinations.com** or by calling 800.422.5053 ext. 4020.

Import Existing Avanti Destinations Reservation Made Outside of *ClientBase*

First, create a new reservation in *ClientBase* and after clicking entering vendor information, click *Live Connect* and *Import an Existing Reservation.* Enter a confirmation number or leave blank, but when in booking site, locate the retrieve reservation area. Once the reservation details are showing, exit the booking. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site and brings up the reservation. Edit or cancel the reservation using instructions supplied by the booking engine, and exit the booking.

Step 4) When the reservation changes are confirmed, click *Import Reservation.*

All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Brendan Vacations

If you are not currently registered to book Brendan Vacations as a new agency set-up, please visit: http://www.tltc.com/agencyupdates/ or call 1-800-421-8446. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Brendan Vacations Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Since we are releasing Brendan Vacations between *ClientBase* releases, set it up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type Brendan Vacations.

URL: Type: **https://book.itropics.com/BookingWizard/*Trams*LiveConnect.aspx?sc=BVUSAS**

Travel Category: Select *Tour* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select Brendan Vacations from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted provider. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Set Up Individual Agent Login Information: To set up Live Connect for **each** user login, click the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Brendan Vacations by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Live Connect Provider: Select Brendan Vacations from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted provider. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Step 3) Retrieve the Brendan Vacations vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Brendan Vacations* booking engine from the drop-down list. The Vendor Code is left blank. In the *Travel Category* profile field, select *Tour* from the drop-down menu.

Live Connect Features Supported by Brendan Vacations

Brendan Vacations supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*).

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

_ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

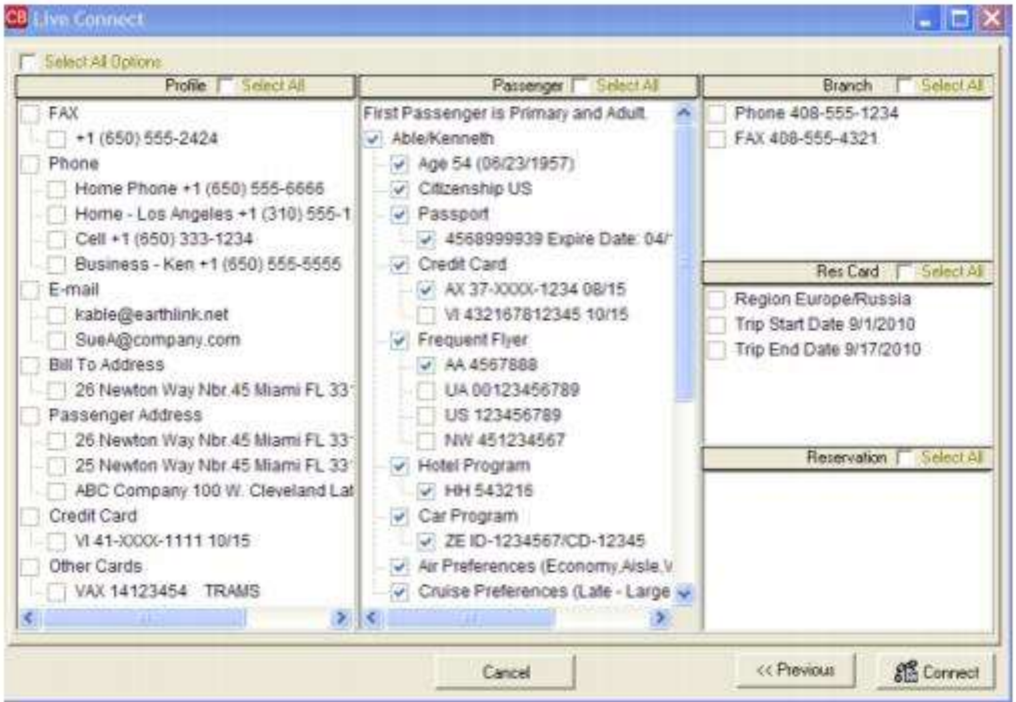
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor and Travel Category* fields and then click *Live Connect.*

Step 3) Select the Brendan Vacations from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Brendan Vacations reservation. Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Brendan Vacations booking site. Complete the reservations using instructions supplied by Brendan Vacations upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

If you need help using the Brendan Vacations booking site, call 1-800-421-8446.

Casa Travel

If you are not currently registered to book Casa Travel on-line, go to

http://www.casatravel.com/profile.php to enroll. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Casa Travel Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Make sure Casa Travel is set up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Or check the URL for accuracy.)

> **Provider Name:** Type Casa Travel.
>
> **URL:** Type **http://www.casatravel.com/login.php**
>
> **Travel Category:** Select *Air* from the drop-down.
>
> **Import XML from:** Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login.** Click *Add* and enter the following information:

> **Live Connect Provider:** Select Casa Travel from the drop-down list.
>
> **User Name and Password:** Enter the necessary fields based upon the login information provided to you when you contacted Casa Travel. (The Agency Number and Code is not applicable.)

<u>Set Up Individual Agent Login Information:</u> Each user can set up their own logins by going to **Utilities|My Login|Live Connect.** Click *Add* and enter the following information:

> **Live Connect Provider:** Select Casa Travel from the drop-down list.
>
> **User Name and Password:** Enter the necessary fields based upon the login information provided to you when you contacted Casa Travel. (The Agency Number and Code is not applicable.)

Step 3) Retrieve the Casa Travel vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Casa Travel* booking engine from the drop-down list. The Vendor Code is 24512795. In the *Travel Category* profile field, select *Air* from the drop-down menu.

Live Connect Features Supported by Casa Travel

Casa Travel supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

_ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

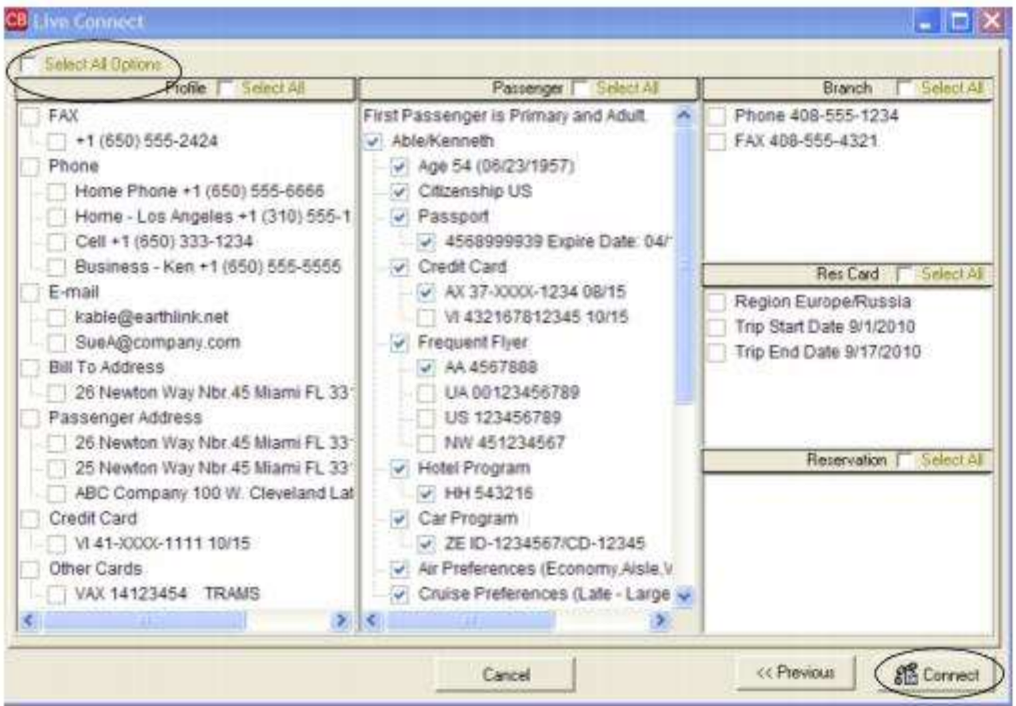
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor and Travel Category* fields and then click *Live Connect.*

Step 3) Select the Casa Travel from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Casa Travel reservation. (This information is not sent to Casa Travel, but can be copied and pasted into reservation fields from top of launch screen.) Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Casa Travel booking site. Complete the reservations using instructions supplied by Casa Travel upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

You are still within the *ClientBase* program when you use Live Connect.

Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in the website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

CCRATravel Hotel Booking Portal

If you are not currently registered to use CCRATravel Hotel Booking Portal, go to http:// www.ccratravel.com and click the link in the bottom left corner. Upon registering as a new user, login credentials are provided. **Note:** Current users can activate using this feature by updating your Agency profile under *My Account*. Just check **Yes** on the *Enable Trams option*.

Set Up CCRATravel Hotel Booking Portal

Step 1) Create a Live Connect Provider for CCRATravel Hotel Booking Portal if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter CCRATravel Hotel Booking Portal.

URL: Enter **https://www.ccratravel.com/app/Onelink.Portal?action=LogIn**

Travel Category: Enter Hotel from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name and password), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login.

Click Add and enter the following information:

Live Connect Provider: Select CCRATravel Hotel Booking Portal from the drop-down list.

User Name and Password: Enter the User Name and Password provided to you when you registered. The account number and agency code are not applicable.

<u>Set Up Individual Agent Login Information:</u> Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select CCRATravel Hotel Booking Portal from the drop-down list.

User Name and Password: Enter the User Name and Password provided to you when you registered. The account number and agency code are not applicable.

CCRA Travel Hotel Booking Portal Features

CCRATravel Hotel Booking Portal supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

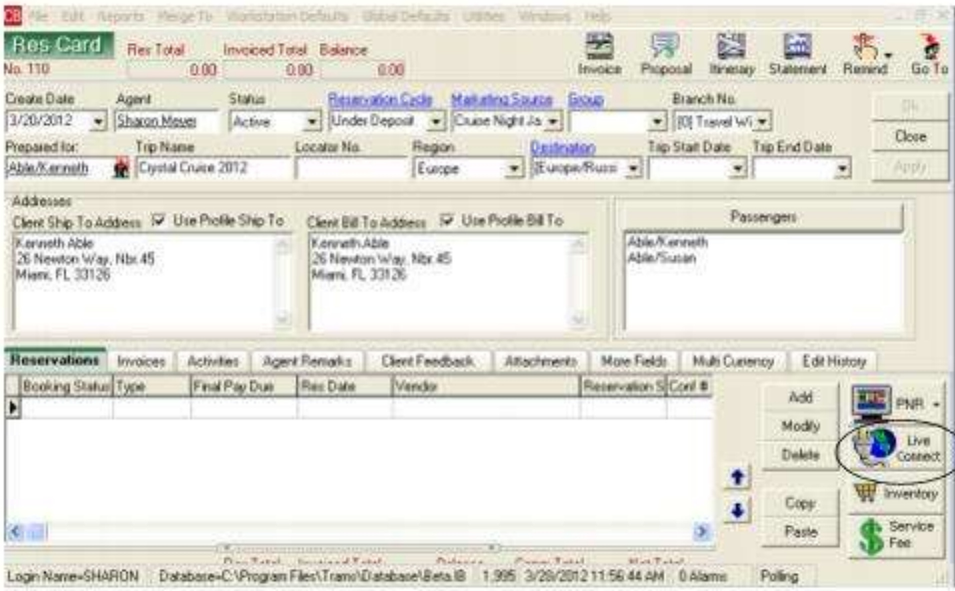
- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORTS EXISTING RESERVATION (For CCRA, this area enables a reservation to be viewed ONLY, but you will not be able to import viewed reservation.)**

✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New CCRA Travel Hotel Booking Portal Reservation

Step One: Use the *ClientBase* Res Card to launch CCRATravel Hotel Booking Portal. Once the setup steps have been completed, retrieve the desired client profile and start or retrieve a Res Card. Click the Live Connect button in the lower right hand corner of the main Res Card screen to launch CCRATravel Hotel Booking Portal from the Res Card level.

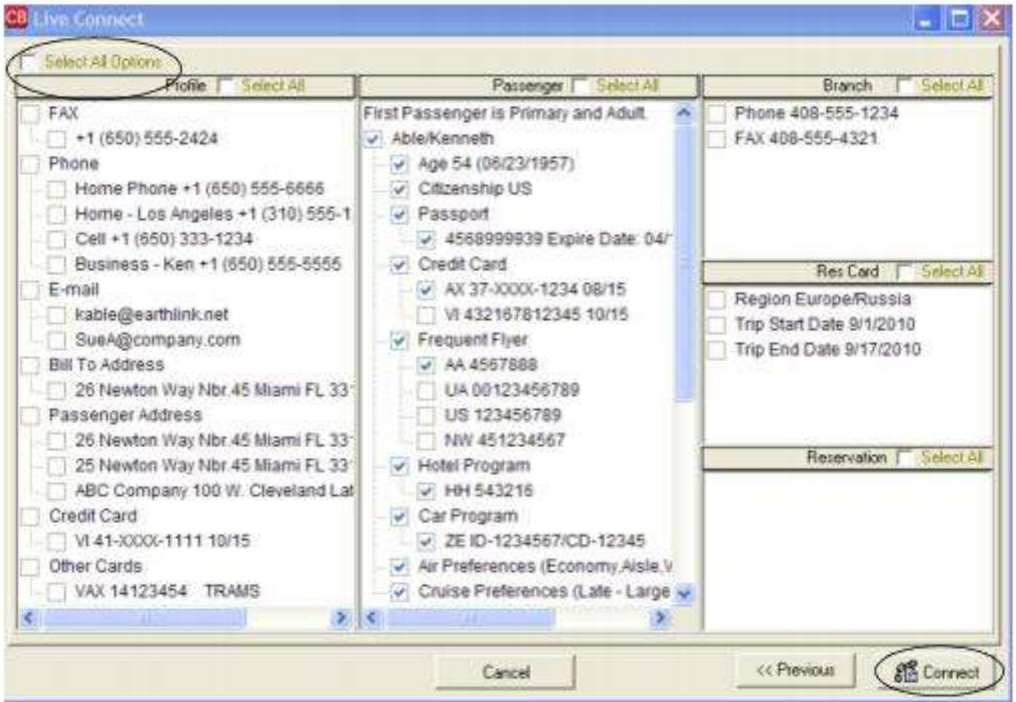


Upon completion of the hotel reservation, the system will have you search for the hotel profile you have booked. If you do not find it in your system after you have queried, you must create a hotel profile by clicking **File|New|Vendor Profile**. (Make sure you click the Live Connect button in the Vendor Profile before you save it to link CCRATravel Hotel Booking Portal to it by clicking *Add*. Next time you need to use this profile, it'll be in the system.)

Tip: If you want to use a CCRATravel Hotel Booking Portal profile you create for all hotel bookings you book through CCRA so you don't have to search for existing hotel profiles or create new ones when importing the reservations, use the *Add Reservation* button to start a new Reservation. From within the *ClientBase* Reservation record, select CCRATravel Hotel Booking Portal as the Vendor (after you set it up) and click the Live Connect button to launch CCRATravel Hotel Booking Portal. When imported back into the system, the hotel you booked will populate the Service Provider area of the reservation.

Step Two: Verify the default Login information and select "Create New Reservation". A window appears with your default login information. The Connect To should read CCRATravel Hotel Booking Portal. If it does not, click the drop down arrow and select it from the list. Any of the login information defaulting in this window can be changed if desired. Use the *Create New Reservations* button to book a new reservation.

Step Three: Select the desired client information to pass to CCRATravel Hotel Booking Portal. Prior to connecting you to the CCRATravel Hotel Booking Portal site, a client selection screen appears, allowing you to select the desired client data you would like to automatically pass to CCRATravel Hotel Booking Portal. Passing this data helps you save time during the booking process, as fewer fields need to be completed by hand. Click *Connect* to proceed.



Step Four: Although still in *ClientBase*, you are now on-line at the CCRA booking site.

Finish confirming your Reservation and upon receiving a confirmation number click *Import Reservation* to bring the reservation details into your *ClientBase* database for managing further.

Remember if you have launched Live Connect at the Res Card level so you can use separate Hotel Vendors, the system will have you search for the hotel profile you have booked. If you do not find it in your system after you have queried, you must create a hotel profile by clicking **File|New|Vendor Profile.** (Make sure you click the Live Connect button in the Vendor Profile before you save it to link CCRATravel Hotel Booking Portal to it by clicking Add. Next time you need to use this profile, it'll be in the system.)

If you used the CCRATravel Hotel Booking Portal Profile at the reservation level to launch Live Connect, the hotel booking will come into *ClientBase* with the hotel name in the Service Provider area of the reservation.

This reservation information is now available for you to invoice, to create Reminders to track the administrative tasks involved in managing the trip and to report on for future marketing purposes.

Retrieve an Existing Reservation for Editing or Cancelling

To cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation*.

Step 3) Live Connect launches the booking engine site. Cancel the reservation using instructions supplied by the booking engine.

Centrav

If you are not currently registered to book Centrav on-line, go to http://www.centrav.com/profile.php to **e**nroll. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Centrav Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Make sure Centrav is set up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type Centrav.

URL: Type **https://www.centrav.com/login.php**

Travel Category: Select *Air* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select Centrav from the drop-down list.

User Name and Password: Enter the necessary fields based upon the login information provided to you when you contacted Centrav. (The Agency Number and Agency Code is not applicable.)

Set Up Individual Agent Login Information: Each user can set up their own logins by going to **Utilities|My Login|Live Connect.** Click *Add* and enter the following information:

> **Live Connect Provider:** Select Centrav from the drop-down list.
>
> **User Name and Password:** Enter the necessary fields based upon the login information provided to you when you contacted Centrav. (The Agency Number and Code is not applicable.)

Step 3) Retrieve the Centrav vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Centrav* booking engine from the drop-down list. The Vendor Code is 24518550. In the *Travel Category* profile field, select *Air* from the drop-down menu.

Live Connect Features Supported by Centrav

Centrav supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

- ✓ Automatically logs you in to booking engine with User Login data from *ClientBase.*
- _ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

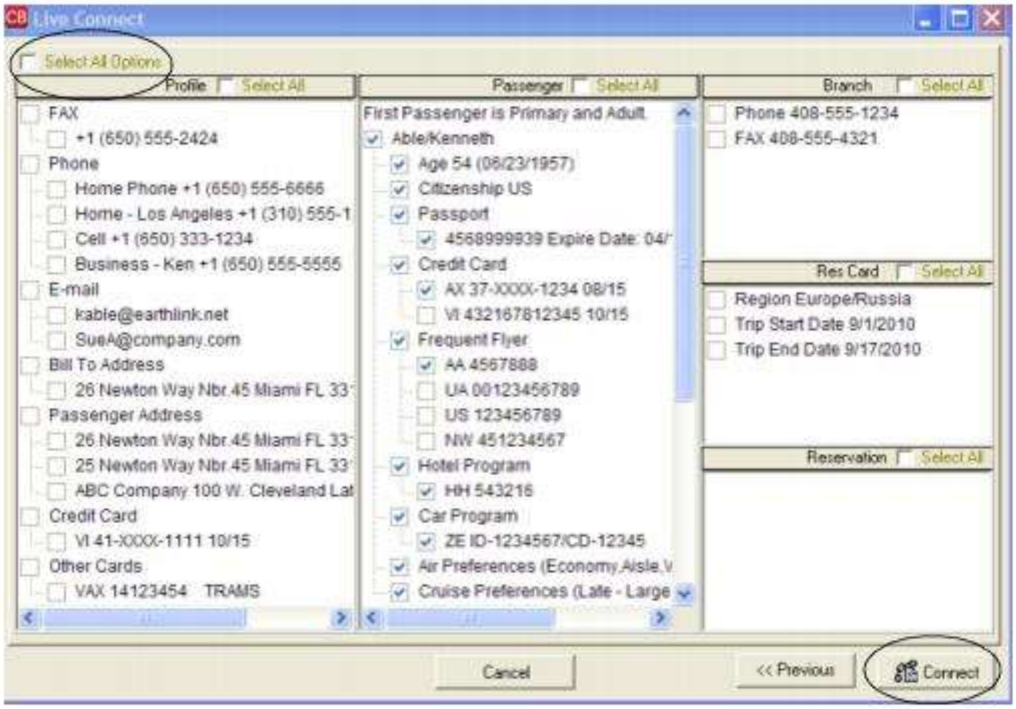
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor and Travel Category* fields and then click *Live Connect.*

Step 3) Select the Centrav from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Centrav reservation. (This information is not sent to Centrav, but can be copied and pasted into reservation fields from top of launch screen.) Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Centrav booking site. Complete the reservations using instructions supplied by Centrav upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in the website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Classic Vacations

Classic Vacations has a website where agents can book transactions with their own logins obtained through Classic Vacations. However, you must be registered to use Classic Vacations with Live Connect in ClientBase. To register, complete the enrollment form below and once completed, fax it to 408.882.8452.

Classic Vacations only provides a User ID and Password to Owner/Manager for use with ClientBase and this differs from the login used on the Classic Vacations website. There are no exceptions to this, as this is a precautionary measure to protect Agency Owners and Managers. **Classic for Agents reserves the right to verify all information provided is accurate.**

Classic for Agents Enrollment Form.

After your request has been received, you will receive a confirmation of receipt. Please allow 2 - 3 weeks to process and receive an e-mail notification with your User ID and password.

Set Up Classic Vacations

Step 1) Create a Live Connect Provider for Classic Vacations if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

> **Provider Name:** Enter Classic Vacations
>
> **URL:** Enter **https://www.classicvacations.com/DexReservationViewer**
>
> **Travel Category:** Enter Tour from the drop-down menu.
>
> **Import XML from:** Enter HTML Source.

Step 2) Each agent should make sure to go into **Utilities|MyLogin|Live Connect** and delete out any Classic login that exists there as there are no longer individual logins.

Thereafter, the database administrator goes to **Global Defaults|Res Card Defaults|Live Connect** to enter the User Name and Password which everyone in agency will use. This must be set up to use Classic.

Step 3) Create a vendor profile in *ClientBase* if one does not exist. From the profile manager, retrieve the Classic Vacations vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click Add, and select Classic Vacations from the drop-down list. The vendor code is left blank. Click *OK* to save.

Classic Vacations Features

Classic Vacations support the following Live Connect Features if checked:

__ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

__ Populates booking engine with User Login data from *ClientBase*.

__ Populates booking engine with profile data from *ClientBase*.

__ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION** - Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Import Previously Made Classic Vacations Reservation Details

Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name*, and add a reservation. Select Classic Vacations as the vendor and enter the *Travel Category* and then click *Live Connect*.

Step 2) Select Classic Vacations from the drop-down menu by Connect To (if not defaulted), and then click *Import existing reservation*.

Step 3) Enter the confirmation number for the reservation you want to import into *ClientBase*. Click *OK*.

Step 4) Although still in *ClientBase*, you are now on-line at the Classic Vacations booking site. Once the reservation is displayed on your screen, click *Import Reservation* at the top of the *ClientBase* screen. All reservation data booked on-line is now located in the *ClientBase* reservation screen.

Contiki Vacations

To register with Contiki Vacations to make bookings as a new agency set-up, please visit:

http://www.tltc.com/agencyupdates or call Contiki Vacations 1-866-266-8454. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Contiki Vacations Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Since we are releasing Contiki Vacations between *ClientBase* releases, set it up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type Contiki Vacations.

URL: Type https://book.contiki.com/BookingWizard/*Trams*LiveConnect.aspx?sc=CHUSAS

Travel Category: Select *Tour* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select Contiki Vacations from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted Contiki Vacations. (The Agency Number and Agency Code is not applicable.)

Set Up Individual Agent Login Information: To set up Live Connect for **each** user login, click the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Contiki Vacations by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Live Connect Provider: Select Contiki Vacations from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted Contiki Vacations. (The Agency Number and Agency Code is not applicable.) Click *OK* to save.

Step 3) Retrieve the Contiki Vacations vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Contiki Vacations* booking engine from the drop-down list. The Vendor Code is left blank. In the *Travel Category* profile field, select *Tour* from the drop-down menu.

Live Connect Features Supported by Contiki Vacations

Contiki Vacations supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase.*

✓ Populates booking engine with profile data from *ClientBase.*

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

_ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

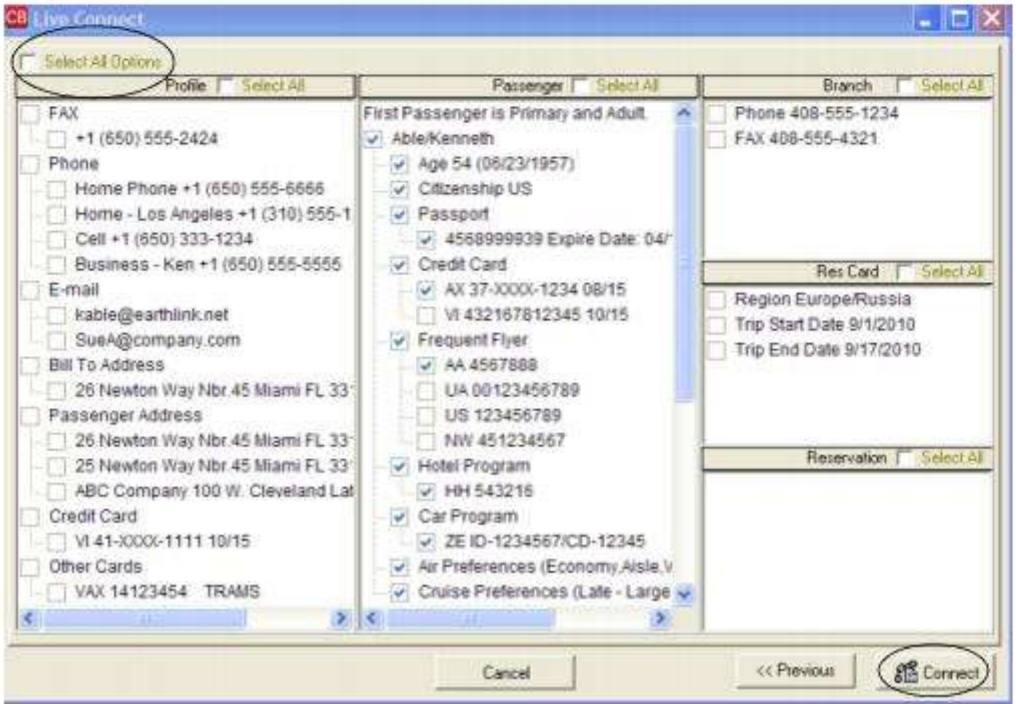
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect.*

Step 3) Select the Contiki Vacations from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Contiki Vacations reservation. Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Contiki Vacations booking site. Complete the reservations using instructions supplied by Contiki Vacations upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

]

If you need help using the Contiki Vacations booking site, call Contiki Vacations at 1-866-266-8454.

CSA Travel Protection

To use Live Connect to purchase trip insurance with CSA, obtain a license to sell CSA Insurance and an account number. If already licensed to sell CSA insurance, the account number is on all of the insurance forms. If not currently licensed to sell CSA Trip Insurance, contact CSA directly at 888-470-9123.

Set Up CSA

Once you obtain your account number, take the following steps to setup *ClientBase* for Live Connect:

Step 1) Go to **Utilities|Live Connect Providers**, and clicking *Modify*. (It's a good idea to check if the URL is correct.)

Provider Name: CSA.

URL: Enter **https://www.csatravelprotection.com?aff=*trams***

Travel Category: N/A.

Import XML from: N/A.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select CSA from drop-down list.

User Name: Enter the name of the agency.

Account Number: The account number is found on the pre-printed insurance contracts you furnish to your clients--input this number.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Complete the following fields:

Live Connect Provider: Select CSA from drop-down list.

User Name: Enter the name of the agency.

Account Number: The account number is found on the pre-printed insurance contracts you furnish to your clients--input this number.

Step 3) Create a vendor profile for CSA Travel Protection. From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select the desired booking engine (CSA) from the drop-down list. The vendor code is left blank.

CSA Features

CSA supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

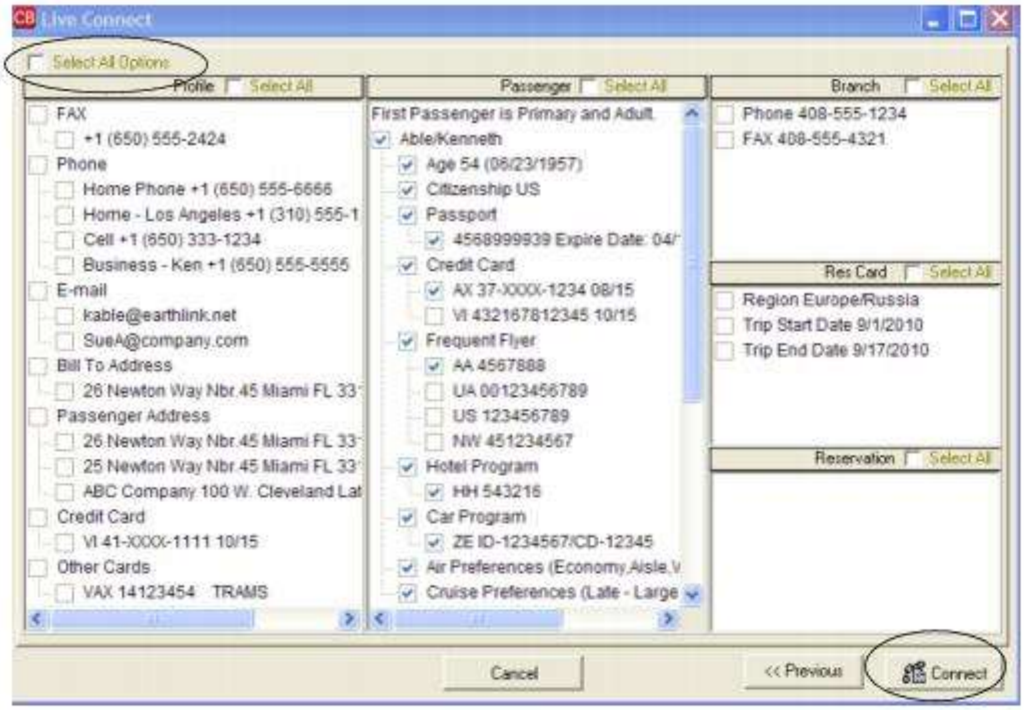
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New CSA Reservation

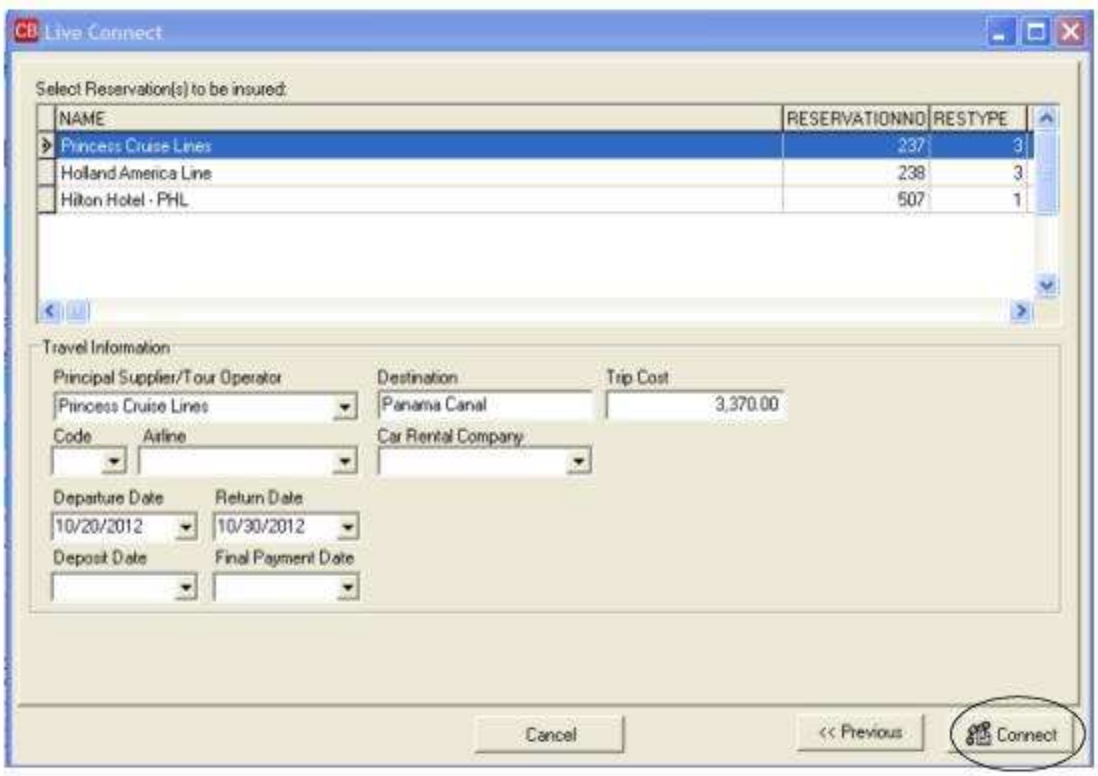
Step 1) When ready to book on-line, create a client's Res Card and fill in the *Agent, Status, Reservation Cycle, and Trip Name* fields and select the travelers. Click the reservation tab and *Add*. Fill in the Vendor and Travel Category fields, and click *Live Connect*.

Step 2) By default the Live Connect provider CSA is listed in the *Connect To* field. Click *Create New Reservations*.

Step 3) Select any customer information for use to book the CSA reservation. This data is automatically passed to CSA and saves time during the booking process, as less fields need to be completed manually. Click *Connect.*



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations, use the CTRL key in combination with clicking. Again, this step is designed to save time during the insurance booking process, as less fields need to be completed manually. Any missing or incomplete data can be updated on the CSA website confirming the insurance booking. Click *Connect*.



Step 5) Although still in *ClientBase*, you are on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation* and all reservation data booked on-line is now located in the reservation in *ClientBase*.

Europe Express

If you are currently not registered Europe Express, go to the Agency Registration Form here, or call 800-927-3876. Upon creating a User Name and Password for each agent in your office, set up *ClientBase* for Live Connect.

Set Up Europe Express

Step 1) Create a Live Connect Provider for *Europe Expess* if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Europe Express

URL: Enter **http://www.europeexpress.com**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login. Click *Add* and enter the following information:

Live Connect Provider: Select *Europe Express* from the drop-down list.

User Name and Password: Enter the necessary fields based upon the login information provided to you when you contacted Europe Express

Account Number/Agency Code: Not applicable.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select *Europe Express* from the drop-down list.

User Name and Password: Enter the necessary fields based upon the login information provided to you when you contacted Europe Express.

Account Number/Agent Code: Not applicable.

Click *OK* to save.

Step 3) Create a vendor profile in *ClientBase* if one does not exist for *Europe Express*. From the profile manager, retrieve each vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select *Europe Express* from the drop-down list. The vendor code is left blank. Click *OK*.

Europe Express Features

Europe Express supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of** ***ClientBase*****)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

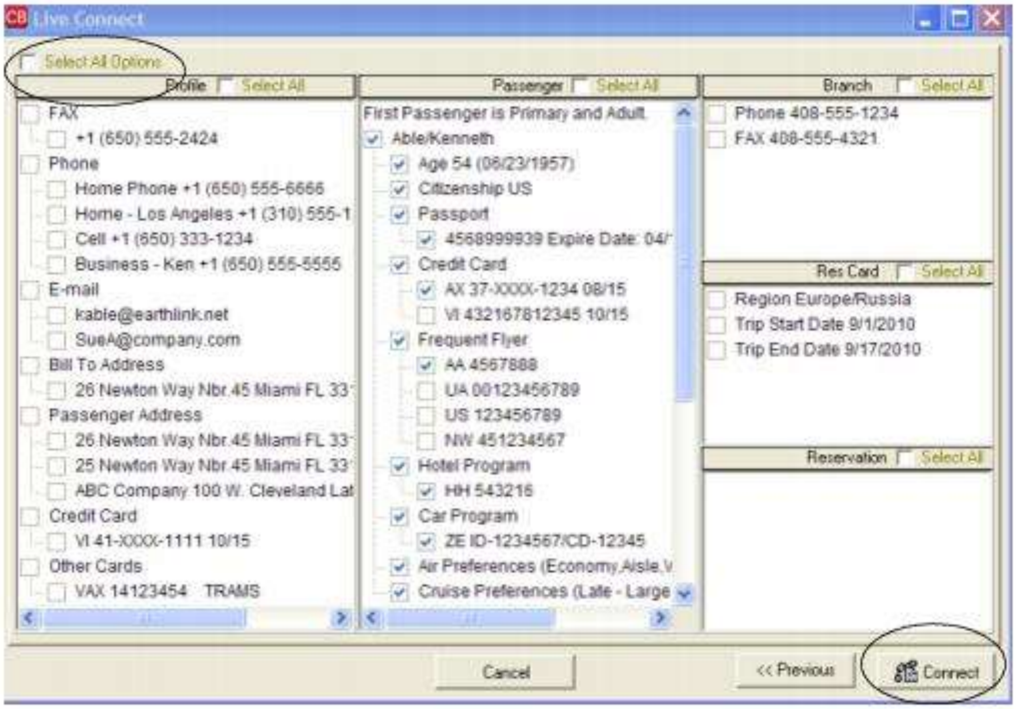
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create Europe Express Reservation

Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Vendor and Travel Category fields and then click *Live Connect*.

Step 2) Select *Europe Express* from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book reservation. This data is passed to the *Europe Express* website, and you can use it in the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Create the reservation with the traveler information passed from *ClientBase* by making a booking and use the instructions supplied by *Europe Express* when you registered. (You will be at provider's website while inside the ClientBase reservation.) When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the ClientBase reservation. :

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation in ClientBase and click *Import Existing Reservation* after Live Connect has been launched. Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in *Europe Express* website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

For help booking reservations in the Europe Express website, call 800-927-3876.

Exclusive Group Travel

If you are currently not registered Exclusive Group Travel, go to http://www.exclusivegrouptravel.com. Upon creating a User Name and Password for each agent in your office, set up *ClientBase* for Live Connect.

Set Up Exclusive Group Travel

Step 1) Create a Live Connect Provider for *Exclusive Group Travel* if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

> **Provider Name:** Enter Exclusive Group Travel
>
> **URL:** Enter **https://www.exclusivegrouptravel.com/res/stwmain.aspx**
>
> **Travel Category:** Enter Tour from the drop-down menu.
>
> **Import XML from:** Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login. Click *Add* and enter the following information:

> **Live Connect Provider:** Select *Exclusive Group Travel* from the drop-down list.
>
> **User Name and Password:** Enter the necessary fields based upon the login information provided to you when you contacted Exclusive Group Travel
>
> **Account Number/Agency Code:** Not applicable.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

> **Live Connect Provider:** Select *Exclusive Group Travel* from the drop-down list.
>
> **User Name and Password:** Enter the necessary fields based upon the login information provided to you when you contacted Exclusive Group Travel.
>
> **Account Number/Agent Code:** Not applicable.

Click *OK* to save.

Step 3) Create a vendor profile in *ClientBase* if one does not exist for *Exclusive Group Travel*. From the profile manager, retrieve each vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select *Exclusive Group Travel* from the drop-down list. The vendor code is left blank. Click *OK*.

Exclusive Group Travel Features

Exclusive Group Travel supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

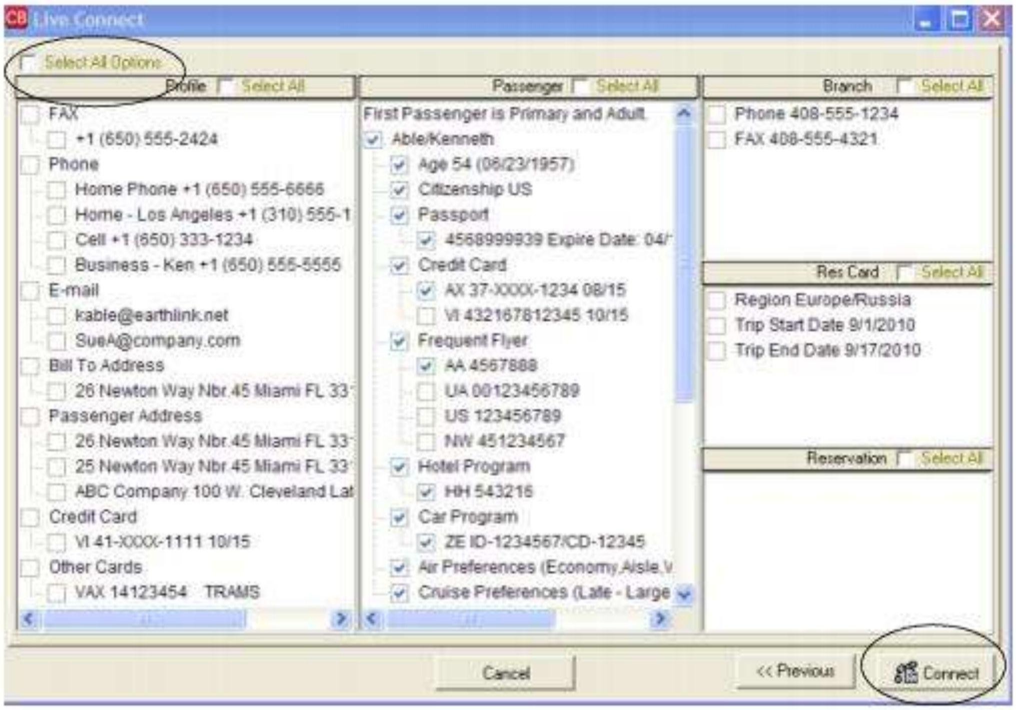
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create Exclusive Group Travel Reservation

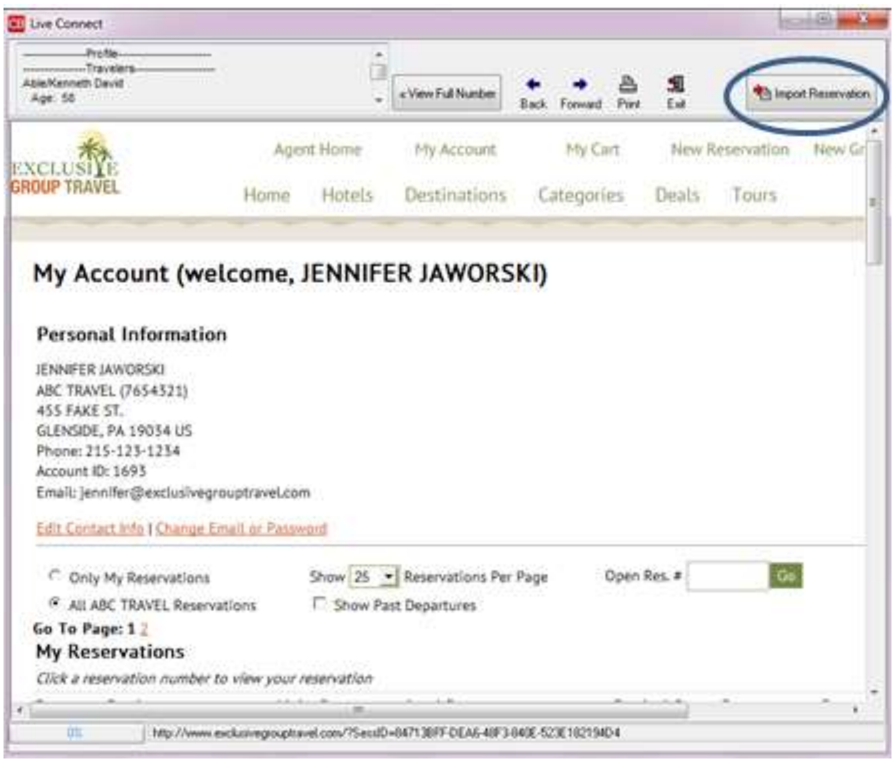
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Vendor and Travel Category fields and then click *Live Connect*.

Step 2) Select *Exclusive Group Travel* from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book reservation. This data is passed to the *Exclusive Group Travel* website, and you can use it in the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site:



Create the reservation with the traveler information passed from *ClientBase* by making a booking and use the instructions supplied by vendor when you registered. When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation in ClientBase and click *Import Existing Reservation* after Live Connect has been launched. Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in *Exclusive Group Travel* website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

For help booking a reservation in the Exclusive Travel Group website, contact information is available at *http://www.exclusivegrouptravel.com*.

Globus and Cosmos Family

If you are currently not registered with Globus and Cosmos Family, contact your Inside Sales consultant at 1.866.270.9850. They will set you up with your username and password. After you are registered, simply logon to http://www.globusjourneys.com/agents and click the *Travel Agent Admin* link on the left hand navigation. Upon creating a User Name and Password for each agent in your office, set up *ClientBase* for Live Connect.

Set Up Globus and Cosmos Family

Step 1) Create a Live Connect Provider for Globus and Cosmos if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Globus and Cosmos.

URL: Enter **https://agents.globusfamily.com/*trams*-agent/**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) **This step must be taken, or you will be unable to launch Globus Live Connect.** Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login. Click *Add* and enter the following information:

Live Connect Provider: Select *Globus and Cosmos Family* from the drop-down list.

User Name, Password: Enter the necessary fields based upon the login information provided to you when you contacted Globus and Cosmos Family.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select *Globus and Cosmos Family* from the drop-down list.

User Name, Password: Enter the necessary fields based upon the login information provided to you when you contacted Globus and Cosmos Family.

Click *OK* to save.

Step 3) Create a separate vendor profile in *ClientBase* if one does not exist--one for Globus and one for Cosmos, Avalon Waterways, Brennan Vacations, and Monograms. From the profile manager, retrieve each vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select *Globus and Cosmos Family* from the drop-down list. The vendor code is left blank. Click *OK*.

Globus and Cosmos Family Features

Globus and Cosmos Family supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

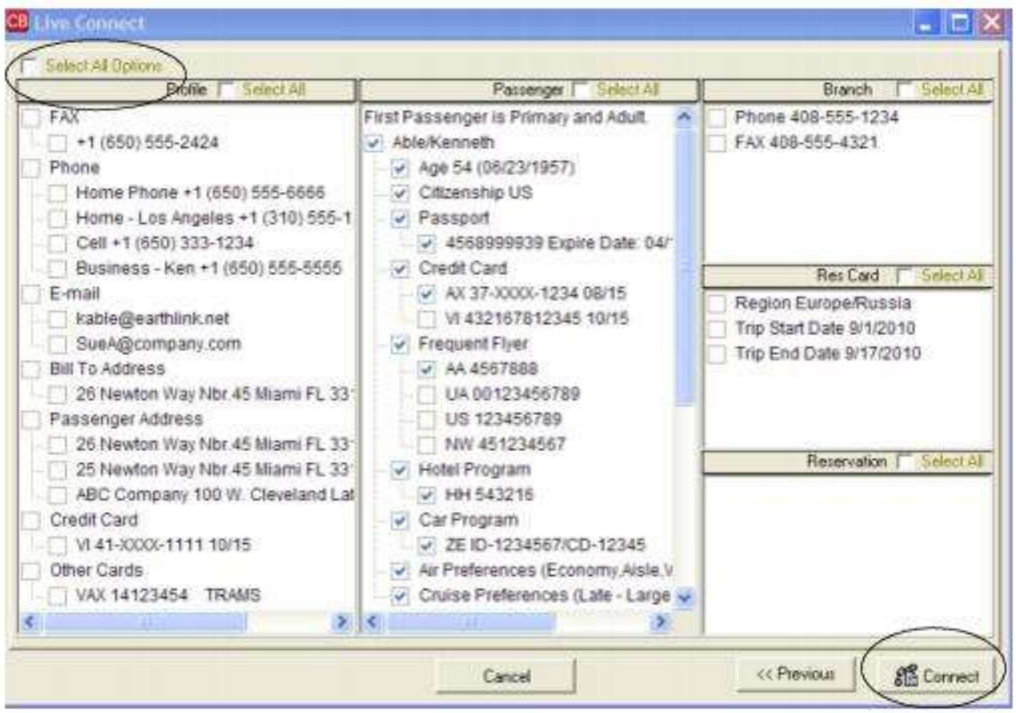
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Globus and Cosmos Reservation

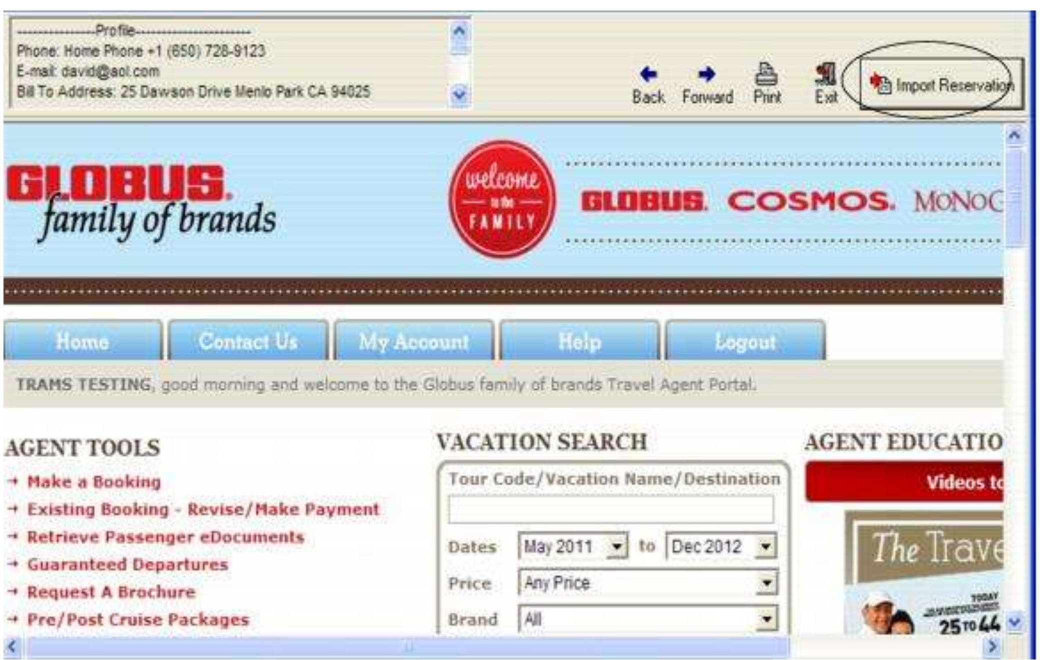
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Vendor and Travel Category fields and then click *Live Connect*.

Step 2) Select Globus and Cosmos Family from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the Globus and Cosmos Family reservation. This data is passed to Globus and Cosmos Family, and you can use it in the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site.



Create the reservation with the traveler information passed from *ClientBase* by clicking *Make a Booking* and use the instructions supplied by Globus and Cosmos Family when you registered. When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in Globus and Cosmos Family website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Globus Family Agent Lingo (Canada)

If you are currently not registered with the Globus Family Agent Lingo, visit the travel agent section of any of the brands at http://www.agentlingo.ca, or call your regional Inside Sales team member directly, or call 800.268.1639. Upon creating a User Name and Password for each agent in your office, set up *ClientBase* for Live Connect.

Set Up Globus Family Agent Lingo

Step 1) Create a Live Connect Provider for Globus and Cosmos if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

> **Provider Name:** Enter Globus Family Agent Lingo
>
> **URL:** Enter **https://agents.globusfamily.ca/trams-agent/**
>
> **Travel Category:** Enter Tour from the drop-down menu.
>
> **Import XML from:** Enter HTML Source.

Step 2) **This step must be taken, or you will be unable to launch Globus Live Connect.** Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login. Click *Add* and enter the following information:

> **Live Connect Provider:** Select *Globus and Cosmos Agent Lingo* from the drop-down list.
>
> **User Name, Password and Account Number:** Enter the necessary fields based upon the login information provided to you when you contacted Globus and Cosmos Family.
>
> **Account Number:** Not applicable.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

> **Live Connect Provider:** Select *Globus and Cosmos Agent Lingo* from the drop-down list.
>
> **User Name, Password and Account Number:** Enter the necessary fields based upon the login information provided to you when you contacted Globus and Cosmos Family.
>
> **Account Number:** Not applicable.

Click *OK* to save.

Step 3) Create a separate vendor profile in *ClientBase* if one does not exist--one for Globus and one for Cosmos, Avalon Waterways, Brennan Vacations, and Monograms. From the profile manager, retrieve each vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select *Globus and Cosmos Agent Lingo* from the drop-down list. The vendor code is left blank. Click *OK*.

Globus Family Agent Lingo Features

Globus Family Agent Lingo supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

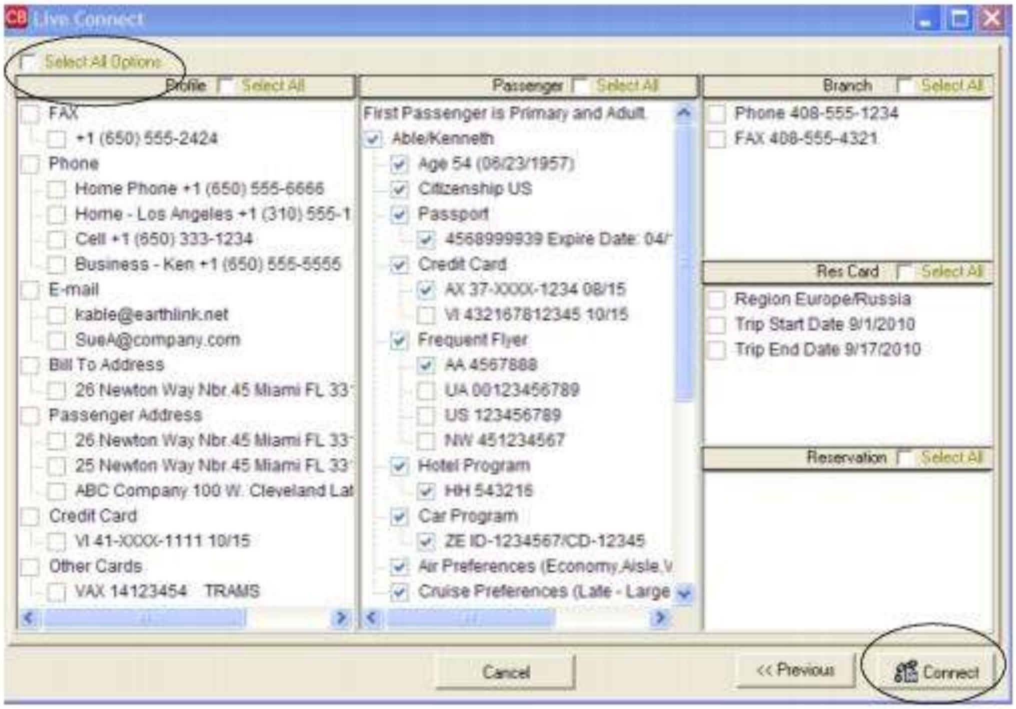
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create Globus Family Agent Lingo Reservation

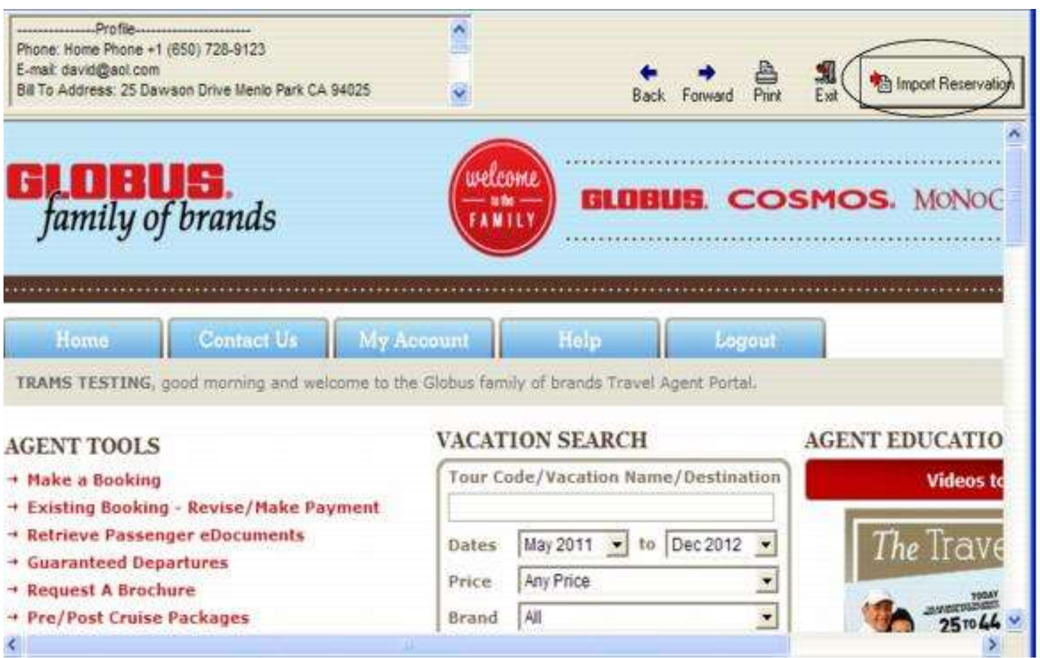
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Vendor and Travel Category fields and then click *Live Connect*.

Step 2) Select Globus and Cosmos Agent Lingo from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book reservation. This data is passed to Globus and Cosmos website, and you can use it in the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site



.

Create the reservation with the traveler information passed from *ClientBase* by clicking *Make a Booking* and use the instructions supplied by vendor when you registered. When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen. All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in Globus and Cosmos Agent Lingo website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Step 4) Although still in *ClientBase*, you are now on-line at the booking site.

Create the reservation with the passenger information passed from *ClientBase* by clicking *Make a Booking* and use the instructions supplied by Globus when you registered. When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Insight Vacations

If you are not currently registered to book Insight Vacations as a new agency set-up, please visit: http://www.tltc.com/agencyupdates/ or call 1-888-680-1241. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Insight Vacations Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Since we are releasing Insight Vacations between *ClientBase* releases, set it up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

> **Provider Name:** Type Insight Vacations.
>
> **URL:** Type: **https://book.insightvacations.com/BookingWizard/*Trams*LiveConnect.aspx?sc=IVUSAS**
>
> **Travel Category:** Select *Tour* from the drop-down.
>
> **Import XML from:** Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Live Connect Login.** Click *Add* and enter the following information:

> **Live Connect Provider:** Select Insight Vacations from the drop-down list.
>
> **User Name/Password:** Enter the User Name and Password based upon the login information provided to you when you contacted provider. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Set Up Individual Agent Login Information: To set up Live Connect for **each** user login, click the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Insight Vacations by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

> **Live Connect Provider:** Select Insight Vacations from the drop-down list.
>
> **User Name/Password:** Enter the User Name and Password based upon the login information provided to you when you contacted provider. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Step 3) Retrieve the Insight Vacations vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Insight Vacations* booking engine from the drop-down list. The Vendor Code is left blank. In the *Travel Category* profile field, select *Tour* from the drop-down menu.

Live Connect Features Supported by Insight Vacations

Insight Vacations supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*).

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

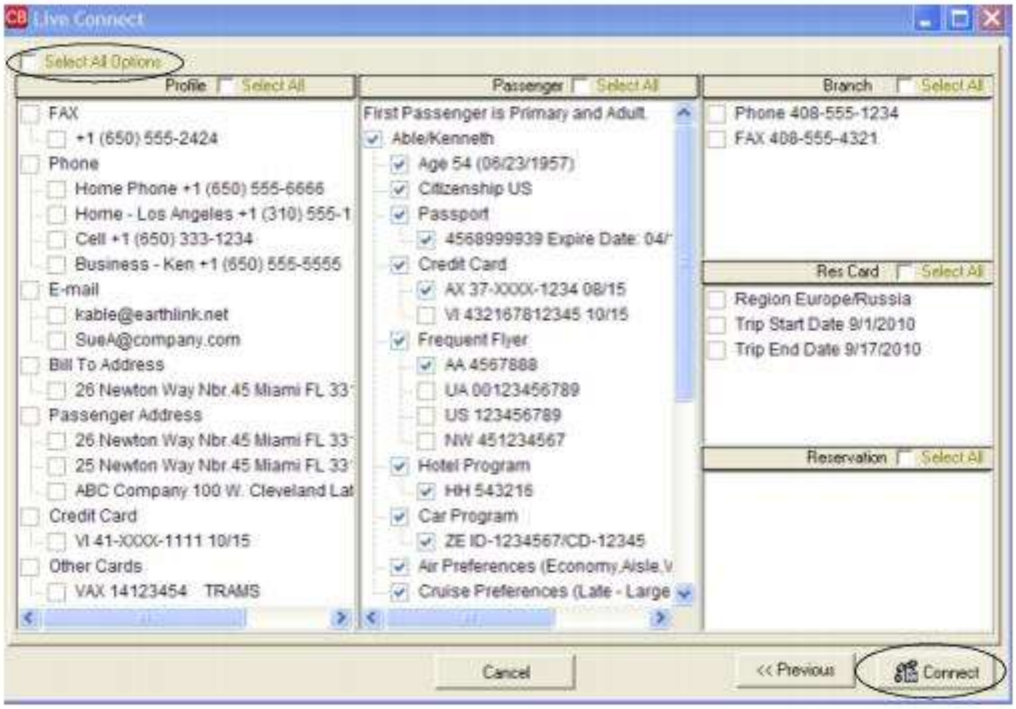
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the Vendor and *Travel Category* fields and then click *Live Connect.*

Step 3) Select the Insight Vacations from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Insight Vacations reservation. Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Insight Vacations booking site. Complete the reservations using instructions supplied by Insight Vacations upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

If you need help using the Insight Vacations booking site, call 1-888-680-1241.

iTravelInsured

If you are already licensed to sell iTravelInsured, your user name is the iTravelInsured Account number, and the password is *Trams* (lower case). If not currently licensed to sell iTravelInsured, contact iTravelInsured directly at 866-347-6673 or go to http://www.itravelinsured.net and click *Registration Form*. The form is a pdf/adobe file format. Print the registration form, complete it and send it to iTravelInsured. Within 24 hours, iTravelInsured will contact you with a user name and password.

Set Up iTravelInsured

Upon receiving a user name and password for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for iTravelInsured if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter iTravelInsured.

URL: Enter **https://www.itravelinsured.com/*Trams***

Travel Category: Enter Insurance from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select iTravelInsured from the drop-down menu to connect to its booking engine.

User Name: Enter the user name provided to you when registering with iTravelInsured. If already licensed to sell iTravelInsured, the user name is the iTravelInsured Account number.

Password: Enter the password provided to you when registering with iTravelInsured. If already licensed to sell iTravelInsured, the password is *Trams* (lower case). All other fields are left blank. Click *OK* to save.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.* Complete the following fields (the other fields are grayed out as they are not applicable):

Live Connect Provider: Select iTravelInsured from the drop-down menu to connect to its booking engine.

User Name: Enter the user name provided to you when registering with iTravelInsured. If already licensed to sell iTravelInsured, the user name is the iTravelInsured Account number.

Password: Enter the password provided to you when registering with iTravelInsured. If already licensed to sell iTravelInsured, the password is *Trams* (lower case). All other fields are left blank. Click *OK* to save.

Step 3) Next, setup an iTravelInsured vendor profile. From the profile manager, retrieve the vendor profile for iTravelInsured (or create the vendor profile) and from the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select the iTravelInsured booking engine from the drop-down list. The vendor code is left blank. Click *OK*.

iTravelInsured Features

iTravelInsured supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

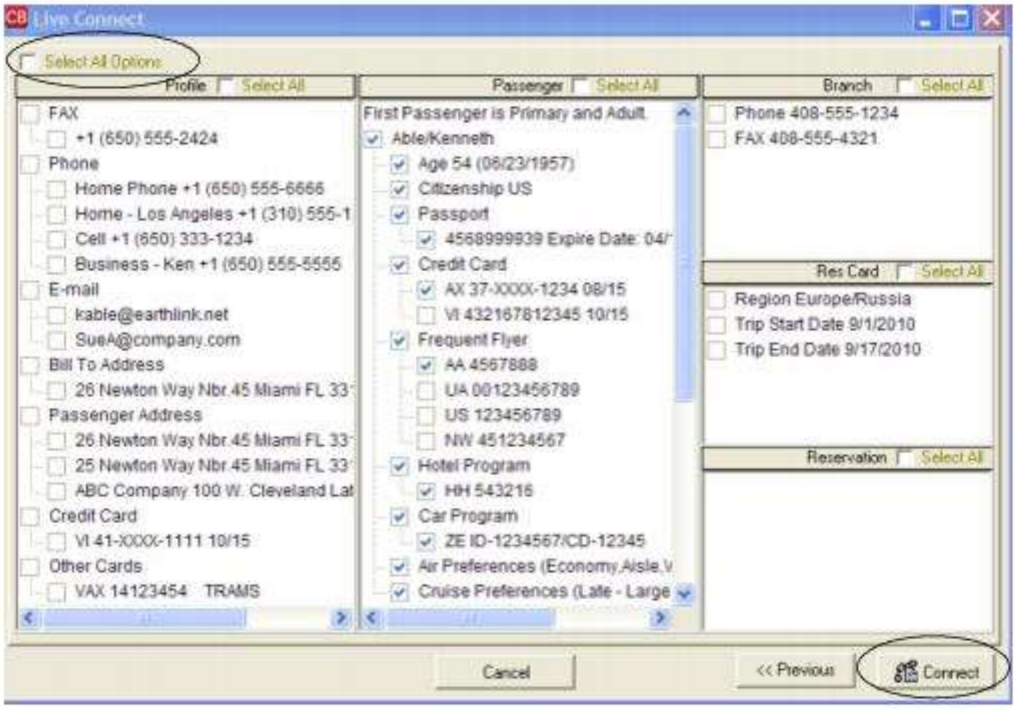
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New iTravelInsured Reservation

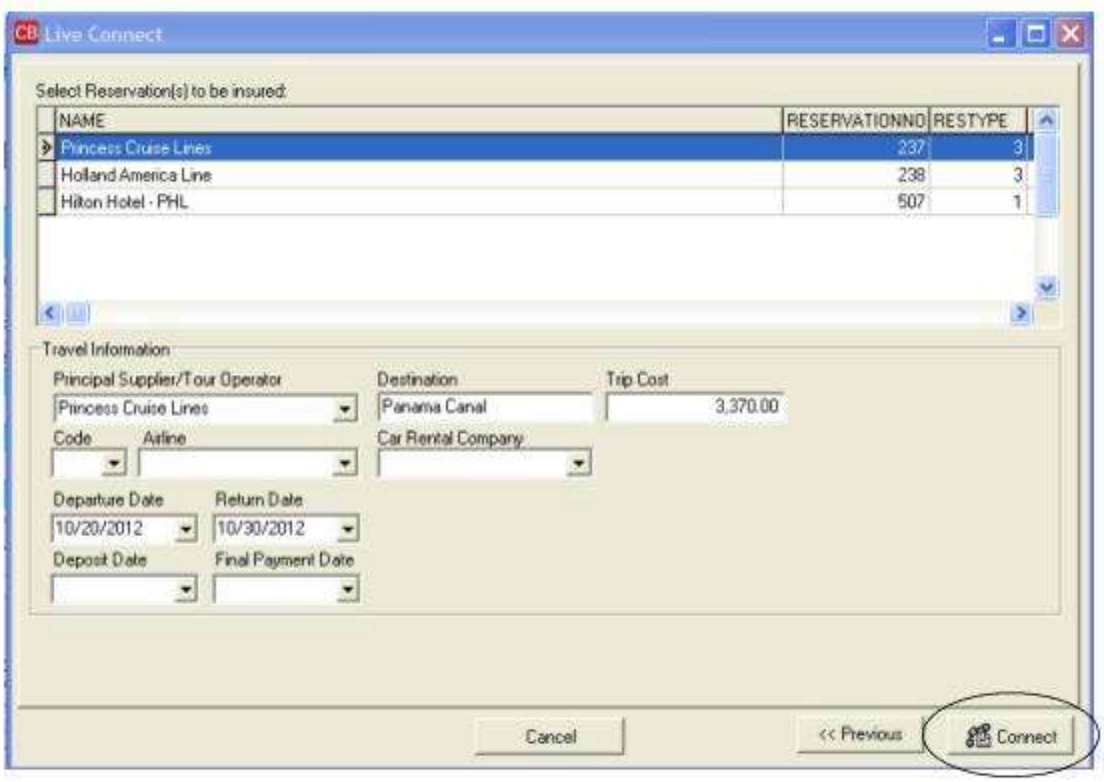
Step 1) Prepare the top of the Res Card and click the *Reservation* Tab and *Add*. Fill in the *Vendor* and *Travel Category* fields, and click *Live Connect*.

Step 2) Select iTravelInsured the drop-down menu by *Connect To* (if not defaulted), and click *Create New Reservations*.

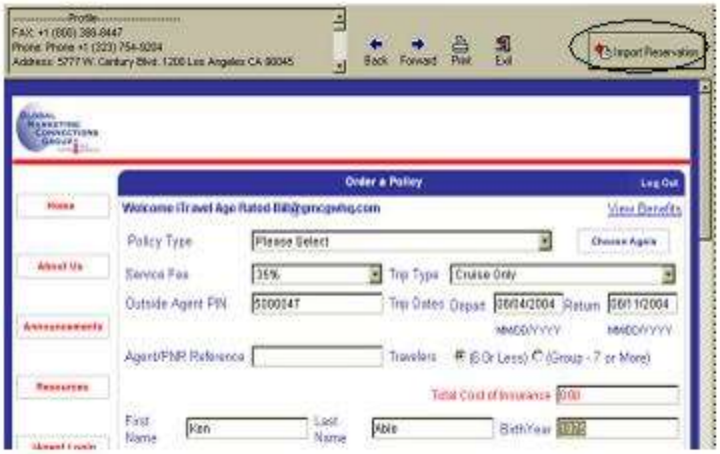
Step 3) Select any customer information to use to book the iTravelInsured reservation. This data is automatically passed to iTravelInsured and saves time during the booking process, as less fields need to be completed manually. Click *Connect.*



Step 4) The system prompts with the reservation records included in this Res Card. Highlight any reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to during the insurance booking process. Any missing or incomplete data can be updated on the iTravelInsured website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



Manulife Global Travel Insurance

All agencies wishing to use Manulife Global Travel Insurance Live Connect should contact

ctssupport@manulife.com.

Set Up Manulife Global Travel Insurance

Upon receiving a User ID and Account Number for your agency, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Make sure you have a correct URL for your agency. To do so, go to **Utilities|Live Connect Providers,** and scroll down to see if Manulife Global Travel Insurance is one of the providers. If not click *Add:*

Provider Name: Manulife Global Travel Insurance.

Status: *Active.*

URL: https://www.igoinsured.com/travelweb/login.aspx?twa=LIVECON

Travel Category: Insurance.

Import XML from: HTML Source.

Include Authentication, etc.: Not applicable.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select Manulife Global Travel Insurance from the drop-down list.

User Name, Password and Agency Code Enter the necessary fields based upon the login information provided to you when you contacted provider (the Agency # is not applicable).

Set Up Individual Agent Login Information: Users can setup their own logins by going to **Utilities|MyLogin|Live Connect**. The database administrator can also do this for **each** user login by clicking on the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Manulife Global Travel Insurance by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Complete the following fields (the other fields are not applicable):

Live Connect Provider: Select Manulife Global Travel Insurance from the drop-down list.

User Name, Password and Agency Code Enter the necessary fields based upon the login information provided to you when you contacted provider (the Agency # is not applicable).

Step 2) From the Profile Manager, retrieve the Manulife Global Travel Insurance vendor profile (or create if it is not in database). From the General Info tab click *Live Connect Providers*. From here, click *Add*, then select Manulife Global Travel Insurance from the drop-down list. The vendor code is left blank. Click *OK*.

Step 3) Setup insurance prompting by going to **Global Defaults|Res Card Defaults|Res Card Insurance Prompting**. (See chapter, *Setting Up ClientBase for Your Agency.)*

Manulife Global Travel Insurance Features

Manulife Global Travel Insurance supports the following Live Connect features if checked off by ✓:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- __ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

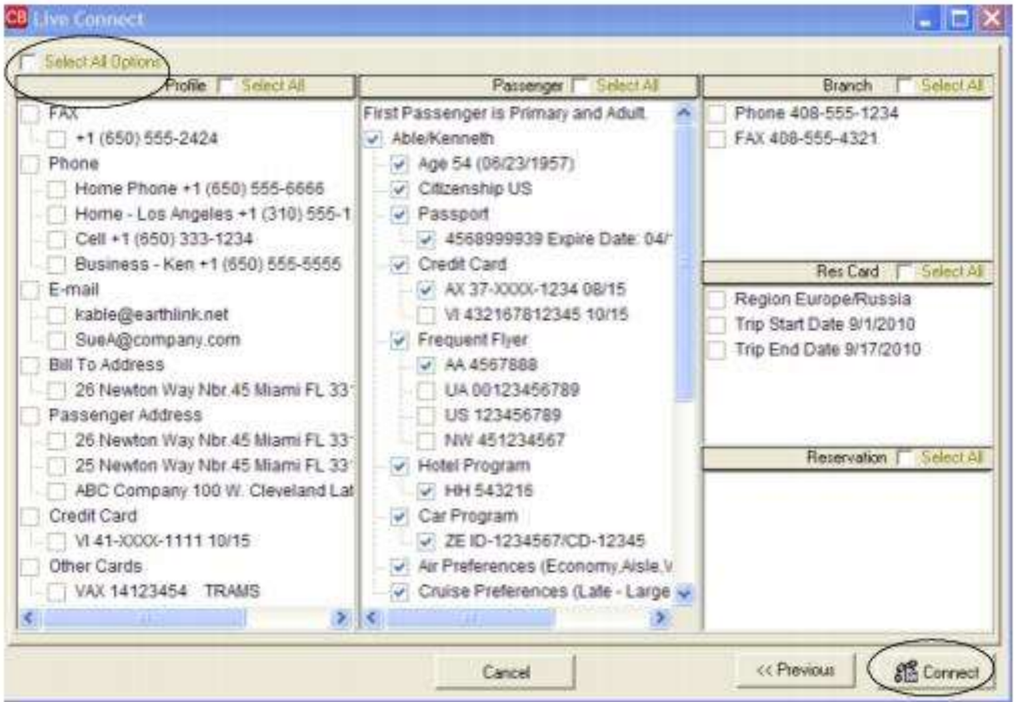
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Manulife Global Travel Insurance Reservation

Step 1) After preparing the Res Card initial information, click the *Reservation* Tab and *Add*. Select Manulife Global Travel Insurance as the vendor and fill in the *Travel Category,* click *Live Connect.*

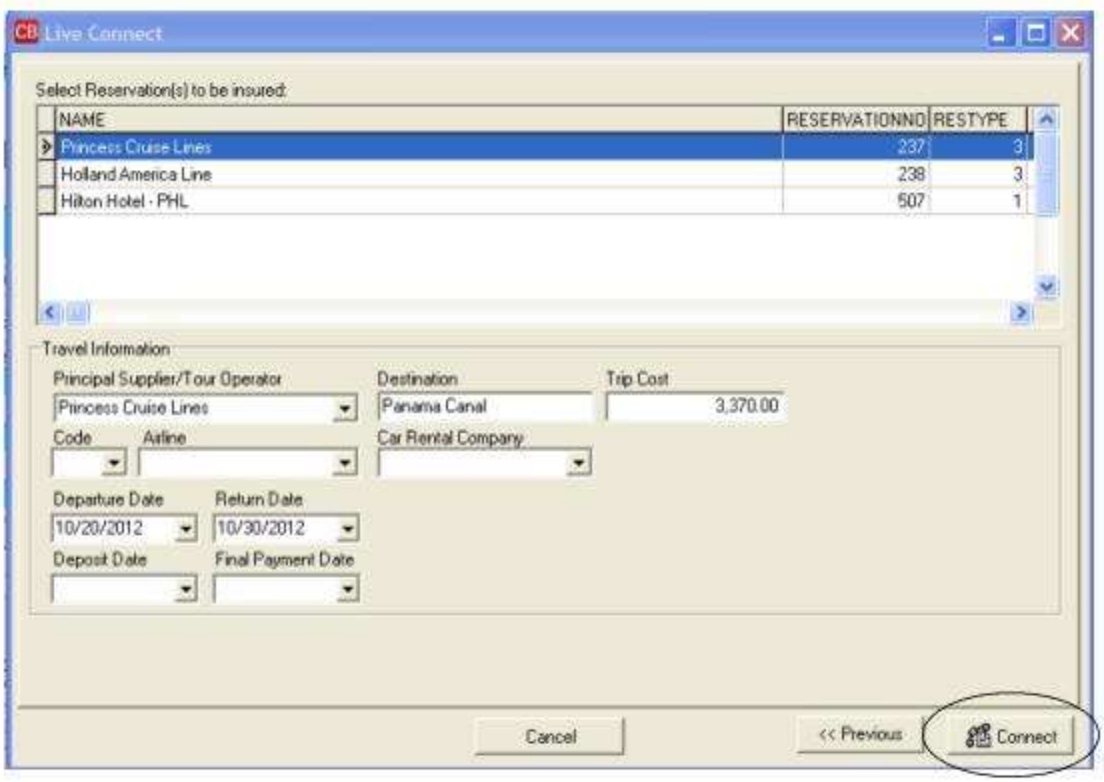
Step 2) Select Manulife Global Travel Insurance from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the reservation. This data is automatically passed to Manulife Global Travel Insurance and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the Manulife Global Travel Insurance website confirming the insurance booking.

Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.

All reservation data booked on-line is now located in the reservation fields in *ClientBase*. Need help booking in Manulife Global Travel Insurance? Call Manulife Global Travel Insurance at 1-866-298-2722.

MHRoss.com

To use Live Connect to purchase MHRoss.com insurance, you must be an authorized MHRoss.com representative and be assigned a User Login, Password, and Account Number for use. To become an authorized agency, and/or to obtain a User Login, Password, and Account number, call, Sheri A. Machat at 866-453-9826 Ext 1.

Set Up MHRoss.com

Upon receiving a User ID and password for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Make sure you have a correct URL for this agency. To do so, go to **Utilities|Live Connect Providers,** and scroll down to see if MHRoss.com is one of the providers. If not click *Add:*

> **Provider Name:** MHRoss.com
>
> **Status:** *Active.*
>
> **URL: https://www.mhross.com/index.php/affliates/tramspost**
>
> **Travel Category:** Insurance.
>
> **Import XML from:** HTML Source.
>
> **Include Authentication, etc.:** Not applicable.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select MHRoss.com from the drop-down list.*

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you when you contacted provider (the Agency Code is not applicable).

Set Up Individual Agent Login Information: Users can setup their own logins by going to **Utilities|MyLogin|Live Connect**. The database administrator can also do this for **each** user login by clicking on the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for MHRoss.com by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Complete the following fields (the other fields are not applicable):

Live Connect Provider: Select MHRoss.com from the drop-down list.*

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you when you contacted provider (the Agency Code is not applicable).

Step 3) From the profile manager, retrieve the MHRoss.com vendor profile (or create if it is not in database). From the General Info tab click *Live Connect Providers*. From here, click *Add*, then select MHRoss.com from the drop-down list. The vendor code is left blank. Click *OK*.

Step 3) Setup invoice insurance prompting by going to **Global Defaults.**

MHRoss.com Features

MHRoss.com supports the following Live Connect features if checked off by ✓:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- __ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

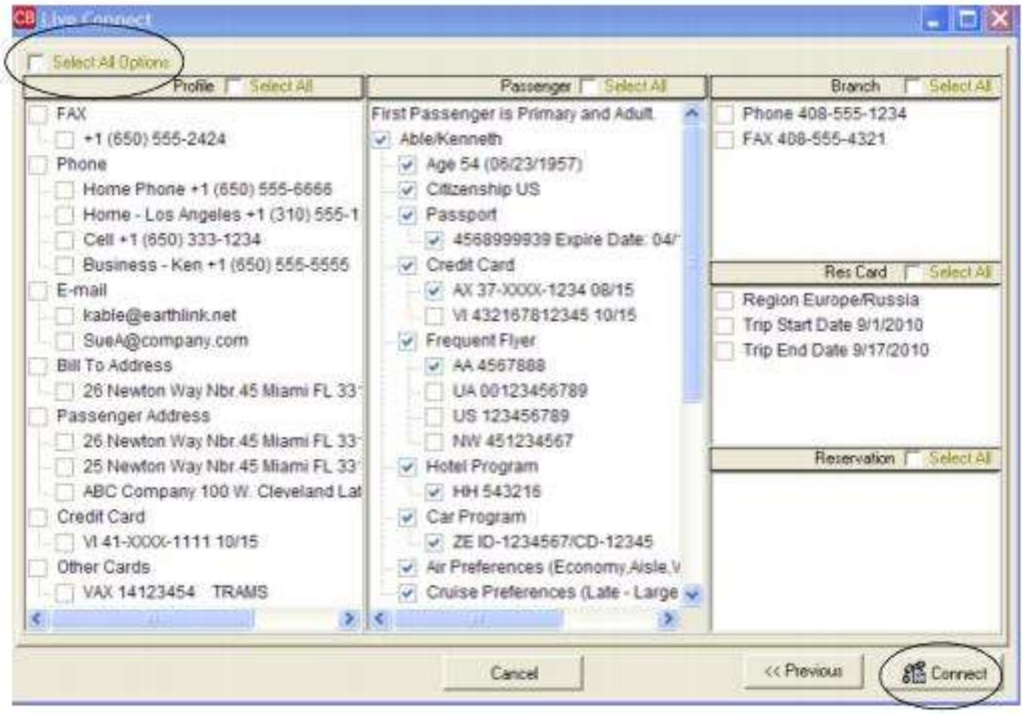
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Global Alert Reservation

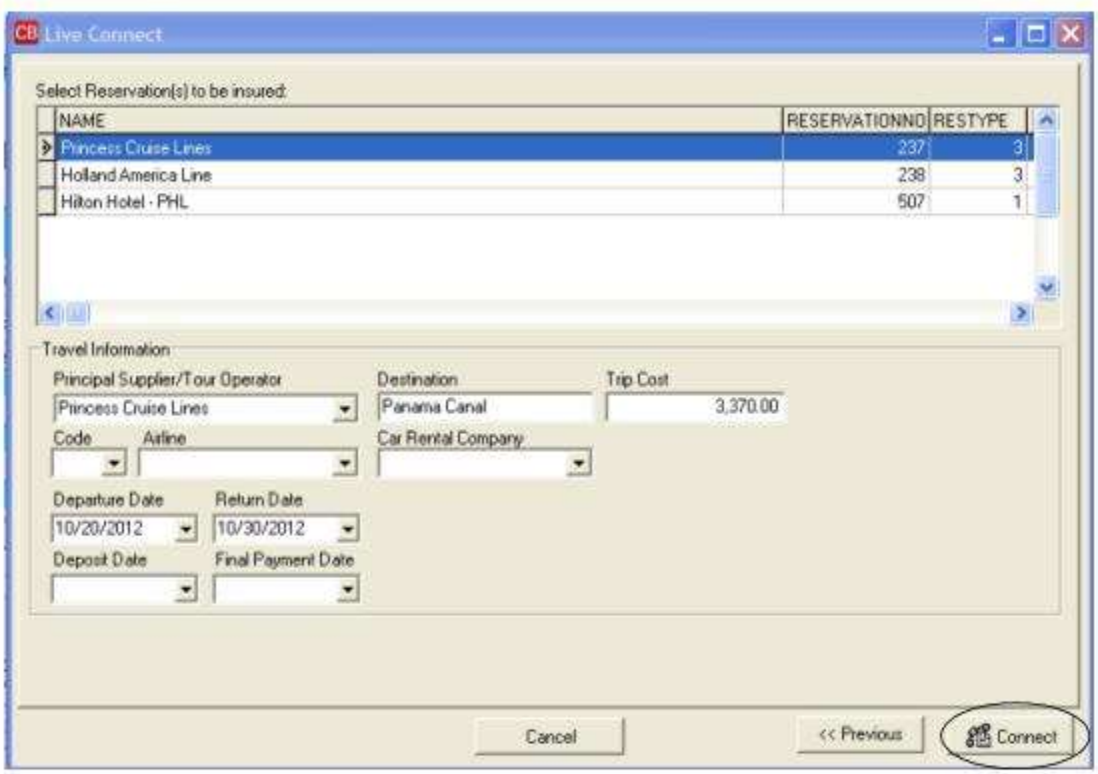
Step 1) After preparing the Res Card initial data, click the *Reservation* tab and *Add*. Fill in the MHRoss.com as the vendor and the *Travel Category. Click Live Connect.*

Step 2) Click *Create New Reservations*.

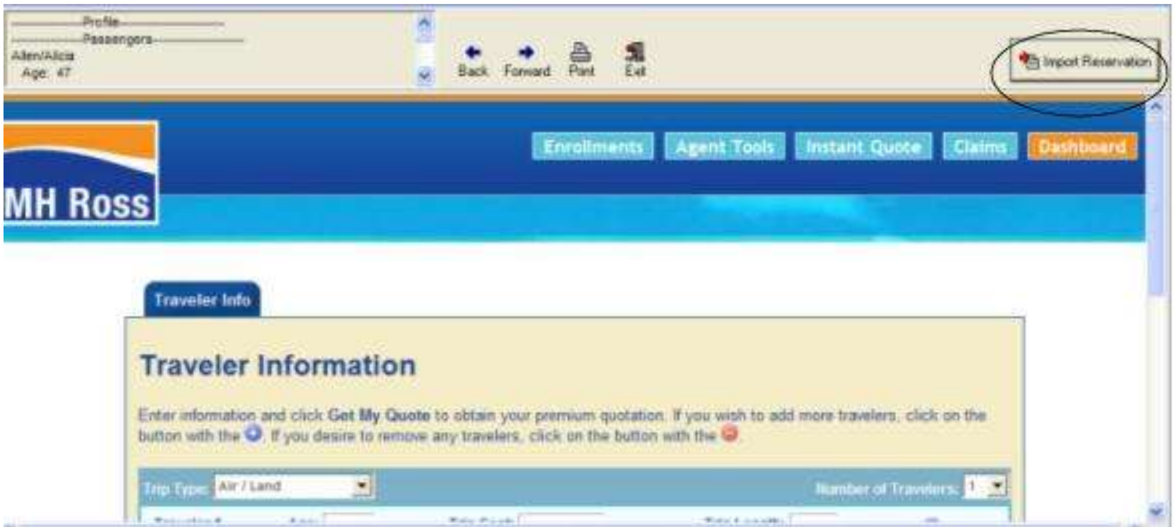
Step 3) Select any customer information to use to book the reservation. This data is automatically passed to MHRoss.com and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the HMRoss.com website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.



Note: If you have printed out the confirmation data, you need to use the back button to get to the confirmation page to import, or you will receive a message.

All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Need technical help? Contact Damian Murtha, MHross.com at 800-888-0432.

Pleasant Holidays

If you are not currently registered to book Pleasant Holidays on-line, go to http://www.pleasantagent.com/ and click *Create a Log In*. Upon registering as a new user, you are provided a User Name and Password. Once you have submitted your request, Pleasant Holidays will activate your log on within one business day.

NOTE: If you connect via the Pleasant connection and sign on to Pleasantagent.com, you can retrieve the Hawaii World bookings that you made via the Hawaii World reservation department to bring into ClientBase. Cruise Bookings are not supported by Pleasant Holidays booking engine and hence not eligible for Live Connect.

Set Up Pleasant Holidays

Upon receiving a User Name and Password for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Pleasant Holidays if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Pleasant Holidays.

URL: Enter **https://www.pleasantholidays.com/trams**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select Pleasant Holidays from the drop-down list*.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Pleasant Holidays.

Account Number: Not applicable.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Pleasant Holidays from the drop-down list*.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Pleasant Holidays.

Account Number: Not applicable.

Step 3) Create a vendor profile in *ClientBase* for Pleasant Holidays if one does not exist. From the profile manager, retrieve the Pleasant Holidays vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Pleasant Holidays from the drop-down list. The vendor code is left blank. Click *OK*.

Note: If you connect via the Pleasant connection and sign on to Pleasantagent.com you can retrieve the Hawaii World bookings that you made via the **Hawaii World** reservation department to bring into *ClientBase*. Cruise Bookings are not supported by Pleasant Holidays booking engine and hence not eligible for Live Connect.

Note: Cruise Bookings are not supported by Pleasant Holidays booking engine and hence not eligible for Live Connect.

Pleasant Holidays Features

Pleasant Holidays supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

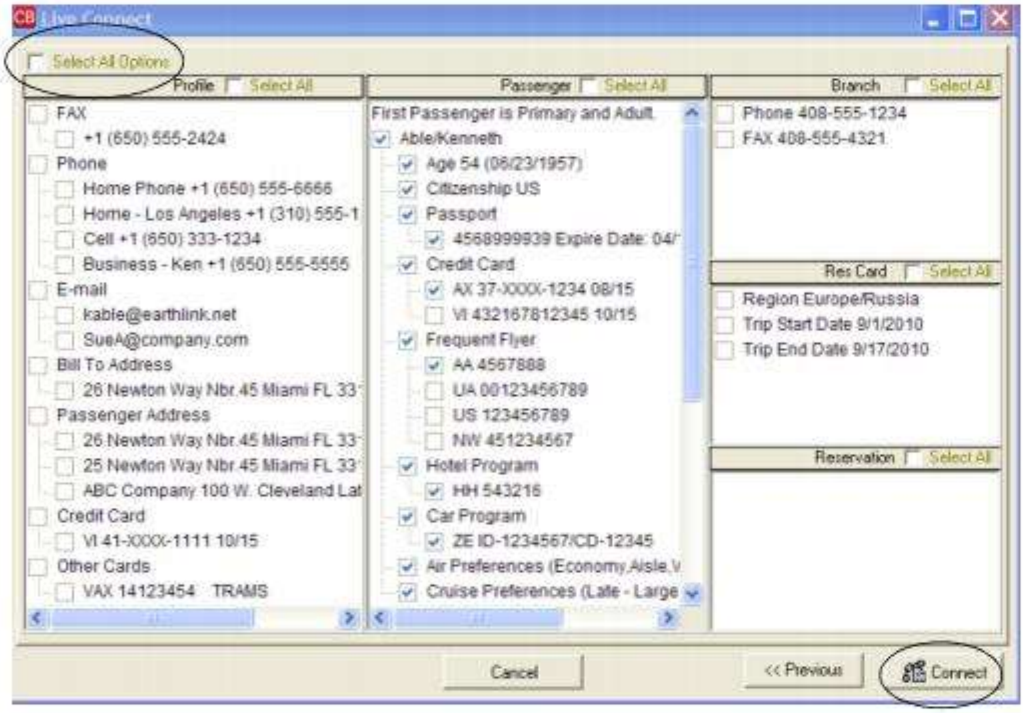
✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

Create New Pleasant Holidays Reservation

Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter Pleasant Holidays as the vendor, fill in the Travel Category and then click *Live Connect*.

Step 2) Select Pleasant Holidays from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the Pleasant Holiday reservation. This data is automatically passed to Pleasant Holidays and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. Create the booking and when the reservation is confirmed, click *Import Reservation.*

All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation* from the Live Connect area. Enter the confirmation number or leave it blank and click *OK.* Use website to Query for the reservation made outside of *ClientBase* if no confirmation number has been used. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Login to the website, and click the retrieve reservation area. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled on-line is now located in the reservation fields in *ClientBase*.

POLAR Online

If you are not currently registered to use POLAR Online, go to **http://www.princess.com**, and click on the *Onesource* link and *Register Your Agency* in the footer of the page. Upon registering as a new user, login credentials are provided. After receiving this information for each agent, take the following steps.

Set Up POLAR Online

Step 1) Create a Live Connect Provider for Polar Online if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Polar Online.

URL: Enter https://book.princess.com/BookingSystem/multiBrandLogin.jsp?company=PC&section=presSignOn

Travel Category: Enter Cruise from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Having obtained your login information, you do not have to set up agent logins for use with POLAR Online (see login information below), but you do need to create a vendor profile in *ClientBase* if one does not exist. From the Profile Manager, retrieve the Princess Cruise Lines vendor profile (or create if not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select POLAR Online from the drop-down list. The vendor code is blank. Click *OK*.

POLAR Online Features

POLAR Online supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

__ Automatically logs you in to booking engine with User Login data from *ClientBase*.

__ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

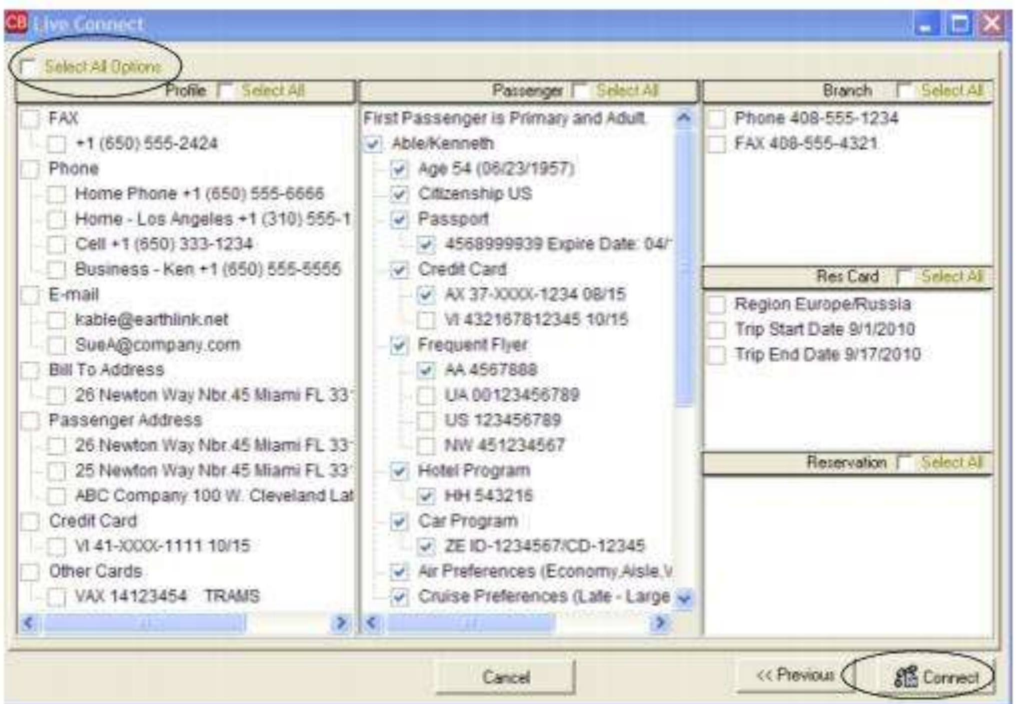
✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New POLAR Online Reservation

Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Select Princess Cruise Lines as the vendor, fill in the *Travel Category* and then click *Live Connect*.

Step 2) Select POLAR Online from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*. (You do not need to enter any login information as this is entered at the POLAR Online Web site.)

Step 3) Select any customer information to use to book the POLAR Online reservation. This data is **NOT** passed to POLAR Online, but you are able to view it at the top of your booking screen and can highlight it, copy, and paste it into the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site.

A page appears which verifies your username and password. Click *Create Reservation* to continue. Create the booking with all traveler information (none is passed to site through *ClientBase*, but you can highlight, copy and paste information at top of screen into booking fields) and when the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation* from the Live Connect area*.* Leave the confirmation number blank and click *OK.* Use POLAR Online to Query for the reservation made outside of *ClientBase*. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Login to the POLAR Online website, and click the retrieve reservation area. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled on-line is now located in the reservation fields in *ClientBase*.

RBC Insurance

To use Live Connect to sell RBC Travel Insurance, you must be a RBC Insurance appointed agency and establish user logins and passwords for selling RBC Insurance on-line. If not currently licensed to sell RBC Travel Insurance, contact RBC Travel Insurance Company directly at 1-800-387-4357.

Set Up RBC Insurance

Upon receiving a user login, password, and Account ID for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for RBC Insurance if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter RBC Insurance.

URL: Enter **https://www1.worldprotect.com/cgi-bin/rbaccess/rbunxcgi**

Travel Category: N/A

Import XML from: N/A

Step 2) ***RBC Insurance security advisors/specialists do not recommend storage of the user name and password within the ClientBase login, but instead completed each time agents connect to RBC using Live Connect.***

Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

> **Live Connect Provider:** Select RBC Insurance from the drop-down list.
>
> **User Name/Password:** Entering the user name and password here would eliminate the need to enter the user name and password each time agents connect to RBC, but may be a security risk if the *ClientBase* program is left running all day on agents' sets. (The Account ID provided to you upon registration is the Account Number.)

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

> **Live Connect Provider:** Select RBC Insurance from the drop-down list.
>
> **User Name/Password:** Entering the user name and password here would eliminate the need to enter the user name and password each time agents connect to RBC, but may be a security risk if the *ClientBase* program is left running all day on agents' sets. (The Account ID provided to you upon registration is the Account Number.)

Step 3) Next, setup the RBC Insurance vendor profile. From the profile manager, retrieve the vendor profile for RBC Insurance (or create the vendor profile if it is not in the database) and from the General Info Tab, click *Live Connect Providers*. From here, click *Add*, then select RBC Insurance booking engine from the drop-down list. The vendor code is left blank. Click *OK*.

RBC Insurance Features

RBC Insurance supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

_ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- _ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- _ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

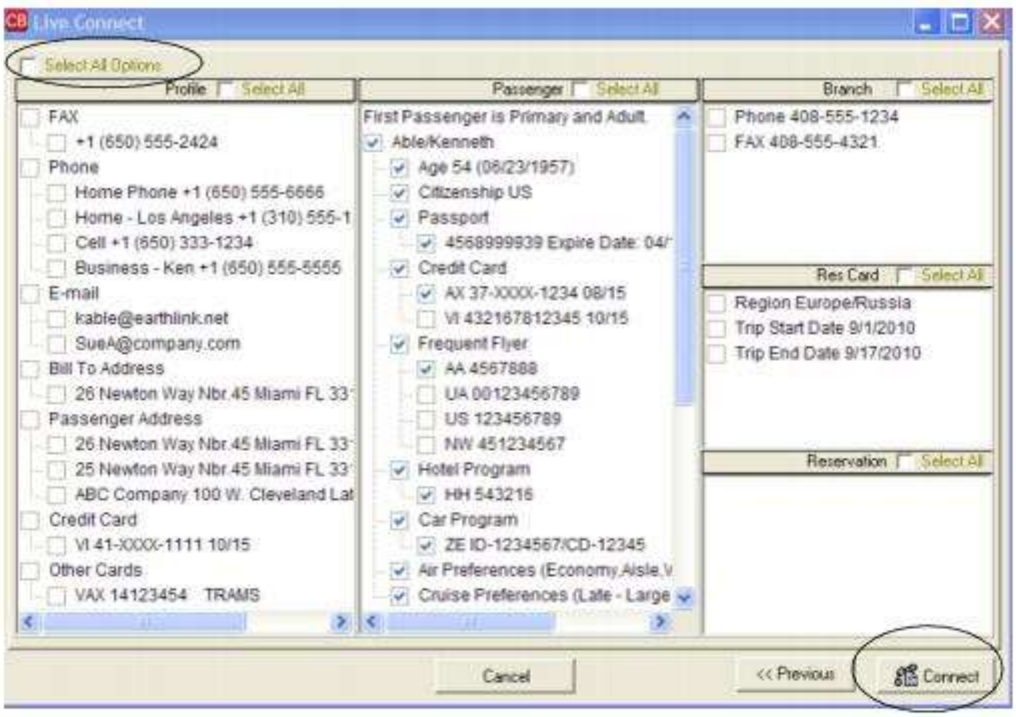
_ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New RBC Insurance Reservation

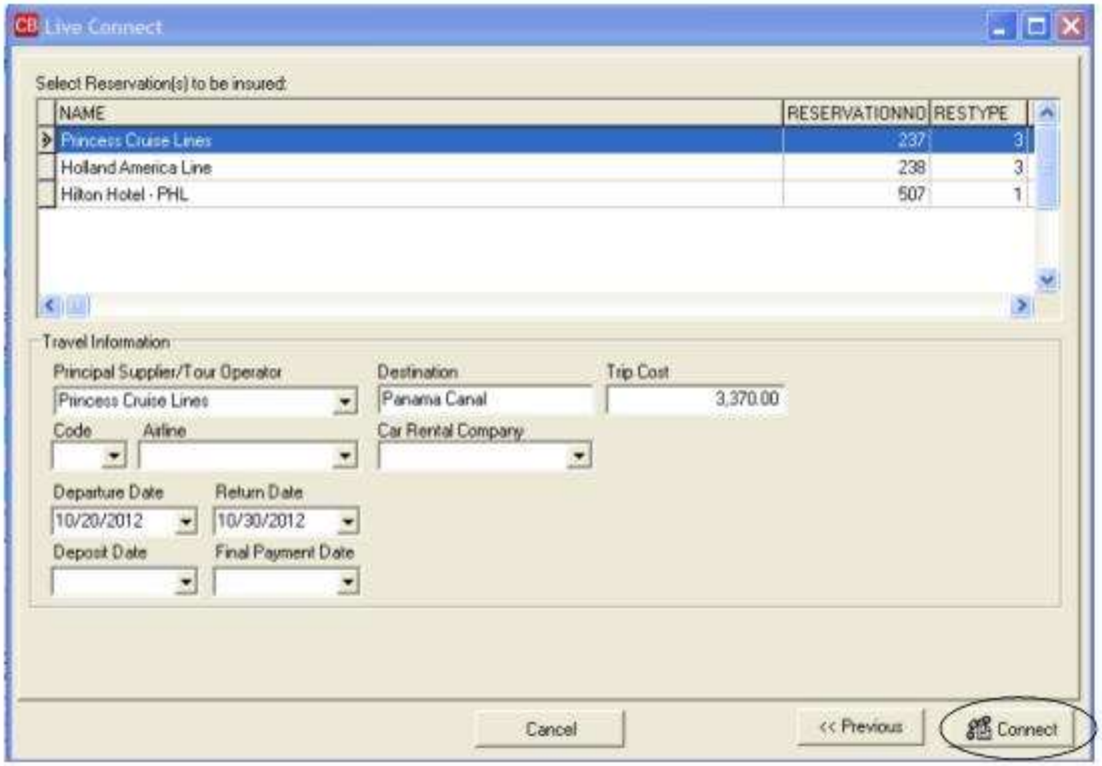
Step 1) Complete the initial Res Card information, Click the *Reservation* Tab and *Add*. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect*.

Step 2) Select RBC Insurance from the drop-down menu by *Connect To* (if not already defaulted), and add the User Name/Password/and Account Number. RBC Insurance security advisors/specialists do not recommend storage of the user name and password within the *ClientBase* Login, but instead completed each time agents connect to RBC using Live Connect. Click *Create New Reservations*.

Step 3) Select any customer information for use to book the RBC Insurance reservation. This data is automatically passed to RBC Insurance and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure by using the CTRL key in combination with mouse clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the RBC Insurance website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Regent Seven Seas - Partner Access

If you are not currently registered to book Regent Seven Seas - Partner Access on-line, go to the Travel Agent Center at http://www.rssc.com, sign in, and click *Book a Cruise with Partner Access*. Complete and submit the *Partner Access Service Request Form*. Your log-in information will be e-mailed to you.

Set Up Regent Seven Seas - Partner Access Live Connect

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Regent Seven Seas if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Regent Seven Seas - Partner Access.

URL: Enter **https://www.rssc.com/agent/webservices/*trams*livehandler.ashx**

Travel Category: Enter Cruise from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login. Click *Add* and enter the following information:

Live Connect Provider: Select *Regent Seven Seas - Partner Access* from the drop-down list.

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you when you contacted Regent Seven Seas - Partner Access. The account number is not applicable.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|MyLogin|Live Connect** and clicking *Add.*

Live Connect Provider: Select *Regent Seven Seas - Partner Access* from the drop-down list.

User Name, Password and Account Number: Enter the necessary fields based upon the login information provided to you when you contacted Regent Seven Seas - Partner Access. The account number is not applicable.

Step 3) Create a vendor profile in *ClientBase* if one does not exist. From the profile manager, retrieve the *Regent Seven Seas* vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select *Regent Seven Seas - Partner Access* from the drop-down list. The vendor code is left blank. Click *OK*.

Regent Seven Seas - Partner Access Features

Regent Seven Seas - Partner Access supports following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

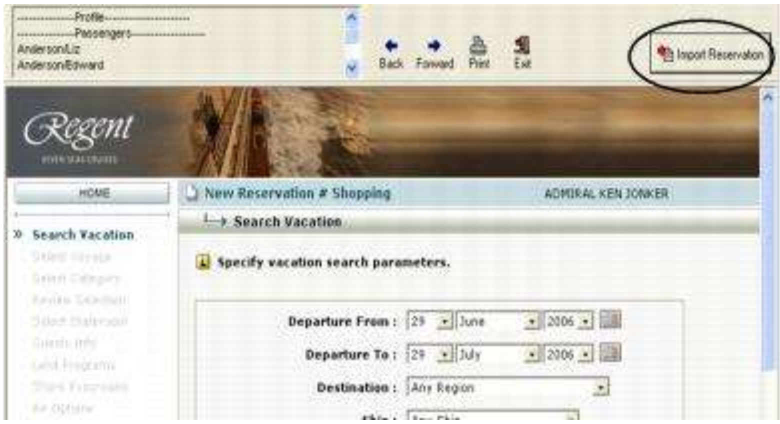
✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Regent Seven Seas - Partner Access Reservation

Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Select *Regent Seven Seas* as the vendor, fill in the *Travel Category,* and then click *Live Connect*.

Step 2) Select Regent Seven Seas - Partner Access from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Although still in *ClientBase*, you are now on-line at the booking site



Create the reservation with the traveler information passed from *ClientBase* by clicking *New Reservation* and use the instructions supplied by Regent Seven Seas - Partner Access when you registered. When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

Step 1) Create a new Res Card or open an existing one and launch Live Connect by clicking the Live Connect icon.

Step 2) Complete the Live Connect settings by identifying the vendor, the Live Connect Provider and appropriate Login information if not auto-populated.

Step 3) Enter the confirmation number for the reservation you want to import and click *Import Existing Reservation.*

Step 4) Depending on the Live Connect Provider, the system either locates the reservation using the confirmation number and automatically import all reservation details, or takes you to the Live Connect Provider's site for you to use its Retrieve Reservation feature to locate the reservation. Upon displaying the existing reservation, click *Import Reservation* and the reservation details are imported into the *ClientBase* Res Card.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

RezSaver

Agents are all eligible to use our software through an existing portal which they have access to using their AxtraWeb username and password.

Set Up RezSaver Live Connect

Take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for RezSaver if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter RezSaver.

URL: Enter **https://b2b.rezsaver.com/auth/liveConnectAuth**

Travel Category: Enter Cruise from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select Live Connect Login. Click *Add* and enter the following information:

Live Connect Provider: Select *RezSaver* from the drop-down list.

User Name, Password and Account Number: Use your AxtraWeb user name/password. The account number is not applicable.

Set Up Individual Agent Login Information: Users can set up their own logins by going to **Utilities|MyLogin|Live Connect** and clicking *Add.*

Live Connect Provider: Select *RezSaver* from the drop-down list.

User Name, Password and Account Number: Use your AxtraWeb user name/password. The account number is not applicable.

Step 3) Below is a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify RezSaver as the booking engine and enter the unique vendor identifier from chart. First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select RezSaver from the drop-down menu and enter the vendor code.

RezSaver Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
AZ	Azamara	RezSaver
CV	Carnival Cruise Lines	RezSaver
CB	Celebrity Cruises	RezSaver

CO	Costa Cruise Lines	RezSaver
CS	Crystal Cruises	RezSaver
CU	Cunard Cruises	RezSaver
DS	Disney Cruise Line	RezSaver
MSC	MSC Cruises	RezSaver
NC	Norwegian Cruise Line	RezSaver
PC	Princess Cruises	RezSaver
RC	Royal Caribbean International	RezSaver

RezSaver Features

RezSaver supports following Live Connect features if checked:

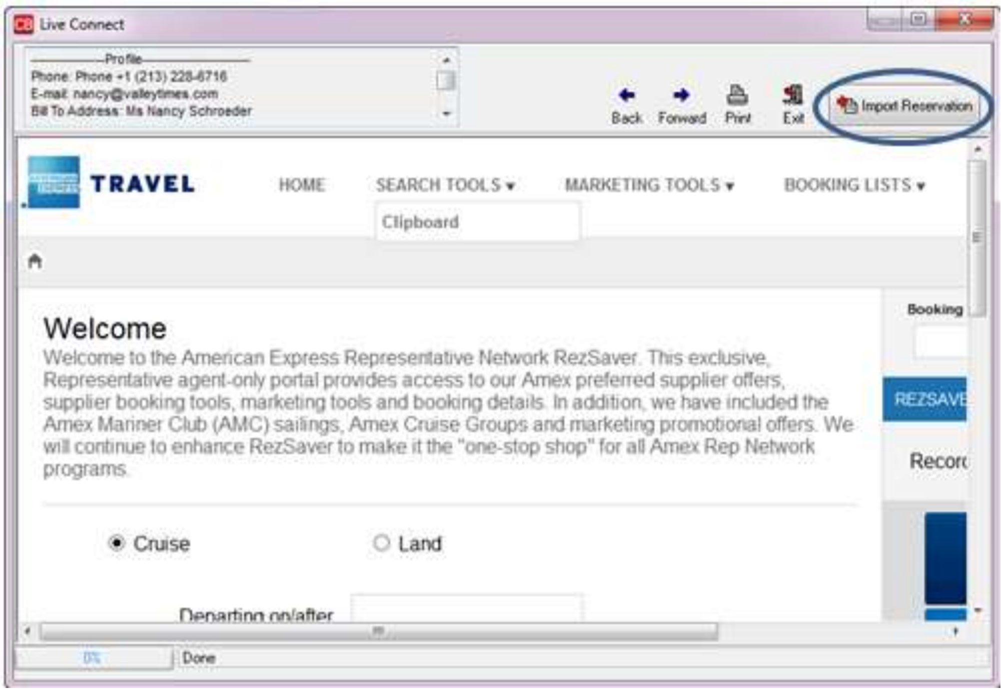
- ✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**
  - ✓ Populates booking engine with User Login data from *ClientBase*.
  - ✓ Populates booking engine with profile data from *ClientBase*.
  - ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.
- ✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**
  - ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
  - ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.
- ✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New RezSaver Reservation

Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Select *RezSaver* as the vendor, fill in the *Travel Category,* and then click *Live Connect*.

Step 2) Select RezSaver from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Although still in *ClientBase*, you are now on-line at the booking site.



Create the reservation with the traveler information passed from *ClientBase* by clicking *New Reservation* and use the instructions supplied by RezSaver. When the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Sabre Vacations Reservation Made Outside of *ClientBase*

Step 1) Create a new Res Card or open an existing one and launch Live Connect by clicking the Live Connect icon.

Step 2) Complete the Live Connect settings by identifying the vendor, the Live Connect Provider and appropriate Login information if not auto-populated.

Step 3) Enter the confirmation number for the reservation you want to import and click *Import Existing Reservation.*

Step 4) Depending on the Live Connect Provider, the system either locates the reservation using the confirmation number and automatically import all reservation details, or takes you to the Live Connect Provider's site for you to use its Retrieve Reservation feature to locate the reservation. Upon displaying the existing reservation, click *Import Reservation* and the reservation details are imported into the *ClientBase* Res Card.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Need help? Contact info@vectotechnology.com or call 888-995-7385.

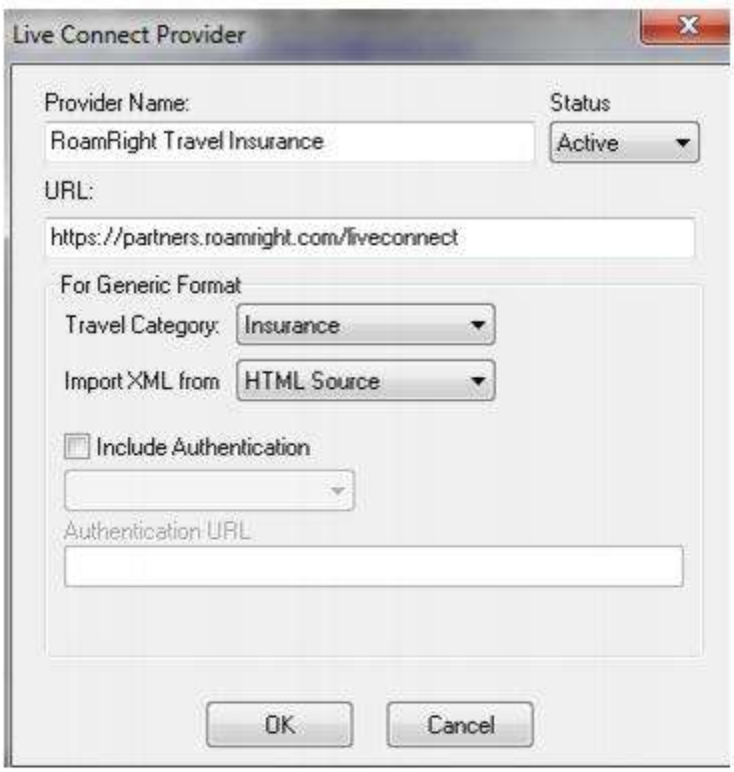
RoamRight Travel Insurance

To use Live Connect to purchase trip insurance with RoamRight Travel Insurance, register at https://www.roamright.com/partners/ or call us at 1-800-699-3845 to speak to a representative.

Set Up RoamRight Travel Insurance

Upon receiving a username, password and agency code, take the following steps to setup *ClientBase* Windows for Live Connect.

Step 1) Create a Live Connect Provider for RoamRight Travel Insurance if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)



Provider Name: Enter RoamRight Travel Insurance.

URL: Enter **https://partners.roamright.com/liveconnect**

Travel Category: Insurance

Import XML from: N/A

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select RoamRight Travel Insurance from the drop-down list.

User Name, Password and Account Code: Enter the User Name, Password and Agency Code you obtained from RoamRight. The Account Number is left blank.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select RoamRight Travel nsurance from the drop-down list.

User Name, Password and Account Code: Enter the User Name, Password and Agency Code you obtained from RoamRight. The Account Number is left blank.

Step 3) Next, setup the RoamRight Travel Insurance vendor profile. From the profile manager, retrieve the vendor profile for RoamRight Travel Insurance (or create the vendor profile if it is not in the database) and from the General Info Tab, click *Live Connect Providers*. From here, click *Add*, then select RoamRight Travel Insurance booking engine from the drop-down list. The vendor code is left blank. Click *OK*.

RoamRight Travel Insurance Features

RoamRight Travel Insurance supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- __ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

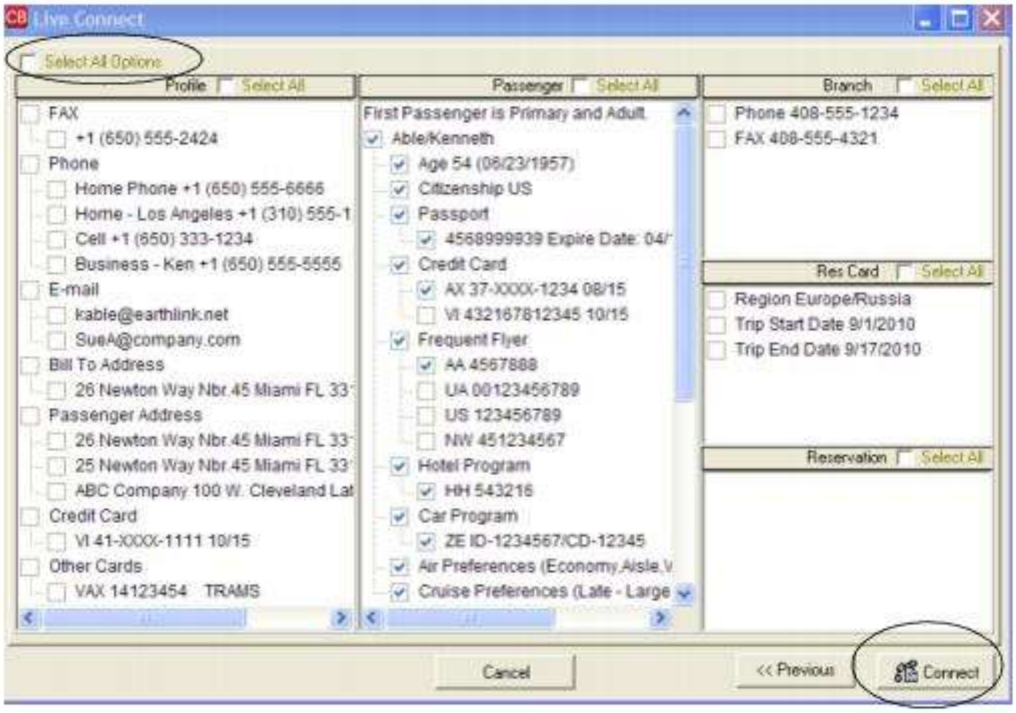
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Roam Right Travel Insurance Reservation

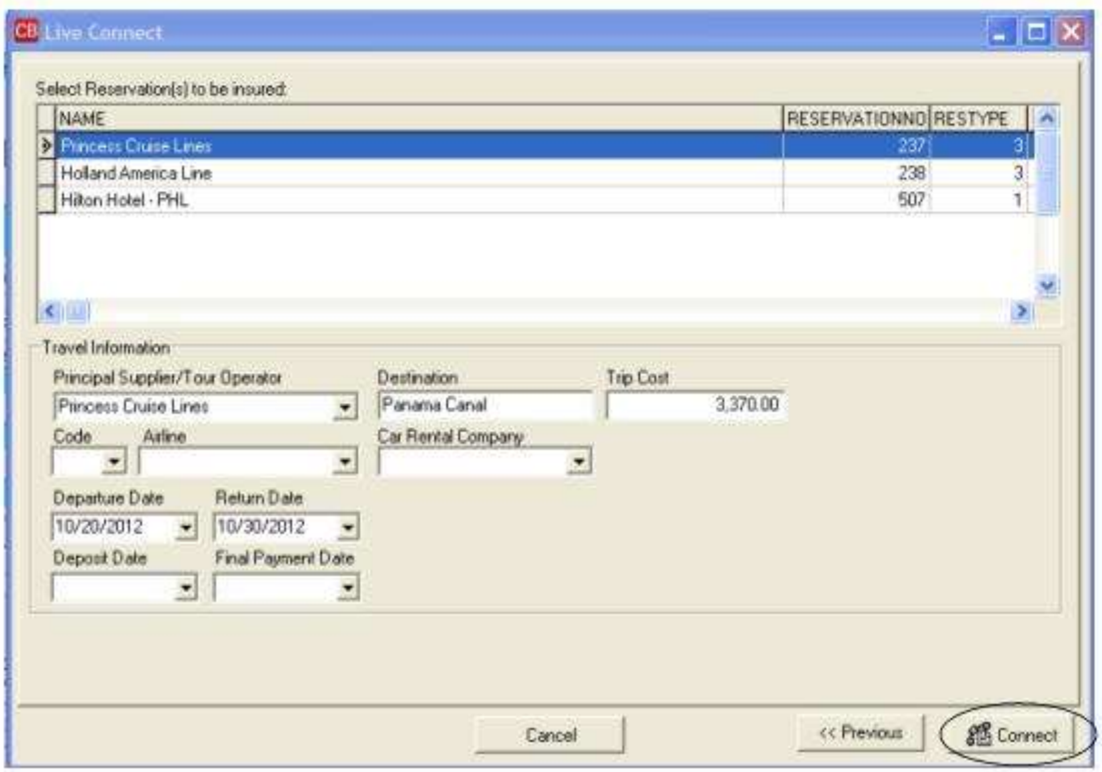
Step 1) Complete the initial Res Card information, Click the *Reservation* Tab and *Add*. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect*.

Step 2) Select RoamRight Travel Insurance from the drop-down menu by *Connect To* (if not already defaulted). Click *Create New Reservations*.

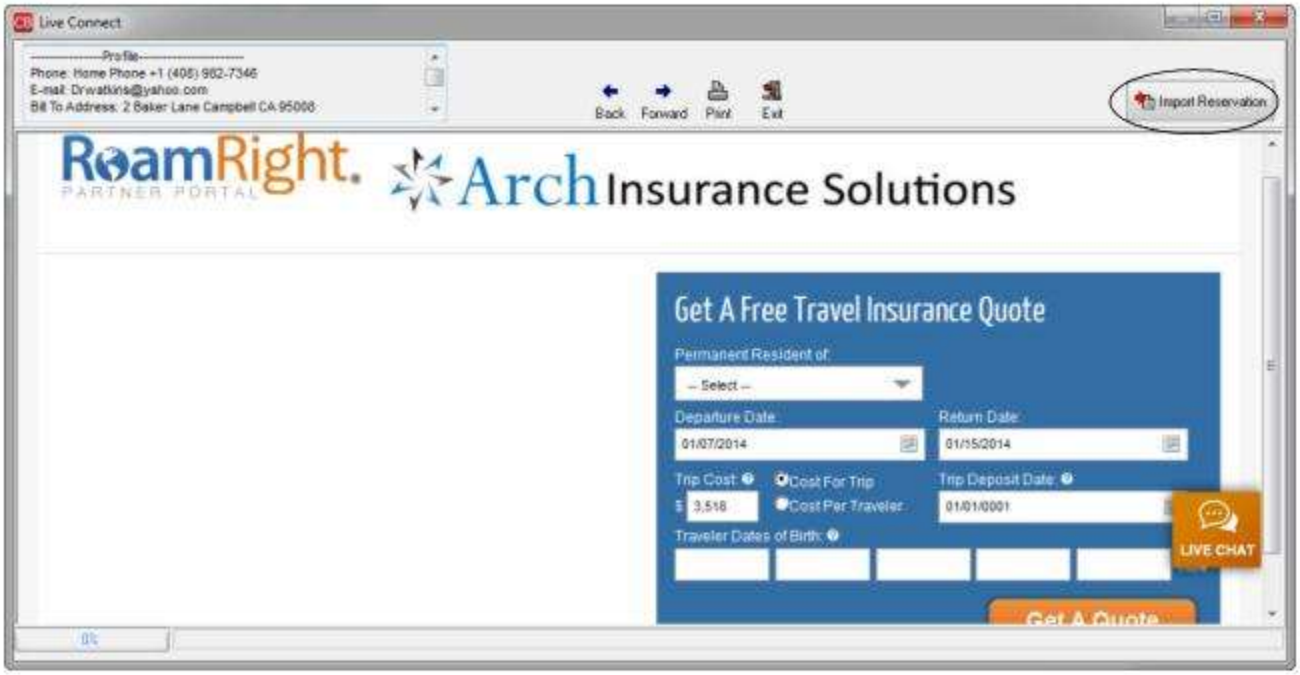
Step 3) Select any customer information for use to book the RoamRight Travel Insurance reservation. This data is automatically passed to RoamRight and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure by using the CTRL key in combination with mouse clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the RoamRight Travel Insurance website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



Sabre Cruises

To use Sabre Cruises, complete the following directions:

1) Every ClientBase customer is a Sabre customer and has a PCC. If you are a Sabre GDS subscriber, you already have your User ID and password to log into Sabre Cruises so proceed to step 3.

2) If you know your PCC because you are a Trams customer, but are NOT a Sabre GDS subscriber, go to Step 3. If you do not know your PCC, email Trams.Implementation@sabre.com to obtain it.

3) Once you know your Sabre PCC, register to use Sabre Cruises and obtain your User ID and temporary Password and ETR by going to:

http://www.sabre-holdings.com/registration/index_add.html. If you want your agents to have their own passwords, you need to include them on this form so a User ID and Password is sent to their email address. Best not to click on any other link on this page, but fill out this form which is the one you need to use.

4) You also have to contact each cruise vendor you are using to inform them that you will be using Sabre Cruises. Click here for a list of cruise vendors and contact phone numbers.

5) Once you have your User ID and Password, got to https://cruises.sabre.com/home.html and login. If you ever have to change or reset the password (because you got locked out) or need additional assistance, call: 800-413-5771.

6) Now set up *ClientBase* to use Sabre Cruises.

Set Up Sabre Cruises Live Connect in *ClientBase*

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) In order to use all Live Connect features in Sabre Cruises.

Note: If you book in Polar, you can import in Sabre Cruise.

Step 2) Make sure Sabre Cruises is set up correctly as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type Sabre Cruises.

URL: Type **https://cruises.sabre.com/SCDO/**

Travel Category: Select *Cruise* from the drop-down.

Import XML from: Select *HTML Source.*

Include Authentication: Check off and from the drop-down select *SiteMinder.*

Authentication URL: Type **https://eservices.sabre.com/tools/Community/Community.asp?form_action=ComDisplay&Com_Id=448&cust_type=*Trams***

Step 3) Login information is not passed from *ClientBase* to Sabre Cruise, so there is no reason to save your login information in *ClientBase*. You will be prompted once to use your regular Sabre login, password and PCC (Pseudo City Code) after you click on *Connect* upon launching Live Connect.

Step 4) When registering, Sabre Cruises provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify Sabre Cruises as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select Sabre Cruises from the drop-down menu and enter the Sabre Cruises vendor code.

Sabre Cruises Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
AM	AMA Waterways	Sabre Cruises
AZ	Azamara	Sabre Cruises
CV	Carnival Cruise Lines	Sabre Cruises
CB	Celebrity Cruises	Sabre Cruises
CO	Costa Cruise Lines	Sabre Cruises
CS	Crystal Cruises	Sabre Cruises
CU	Cunard Cruises	Sabre Cruises
DS	Disney Cruise Line	Sabre Cruises
HA	Holland America Line	Sabre Cruises
IC	Island Cruises	Sabre Cruises
MSC	MSC Cruises	Sabre Cruises
NC	Norwegian Cruise Line	Sabre Cruises
PC	Princess Cruises	Sabre Cruises

OE	Oceania Cruise Line	Sabre Cruises
RE	Regent Seven Seas Cruise Line	Sabre Cruises
RC	Royal Caribbean International	Sabre Cruises
VR	Viking River Cruises	Sabre Cruises

Live Connect Features Supported by Sabre Cruises

Sabre Cruises supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

__ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

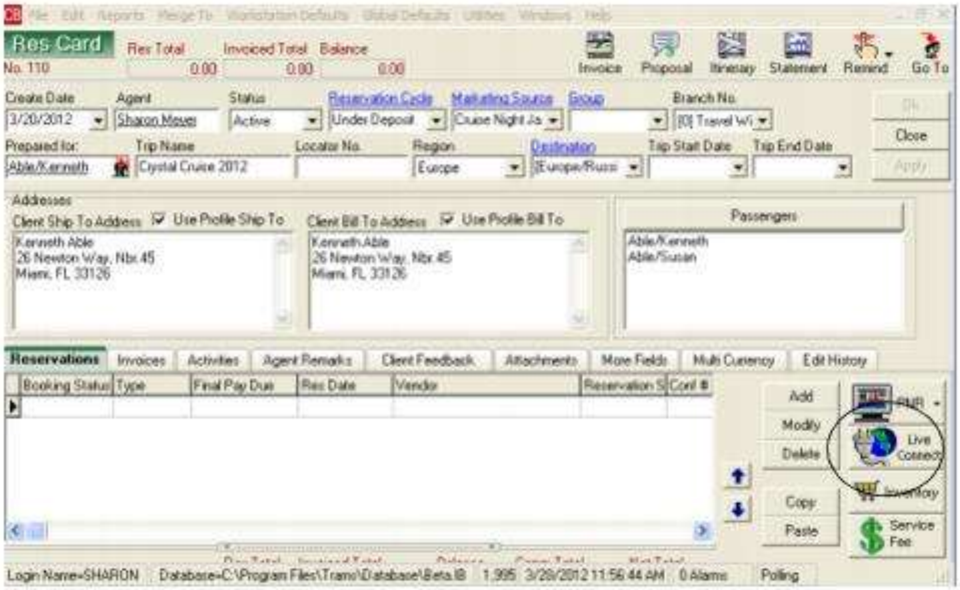
✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Reservation Using Live Connect

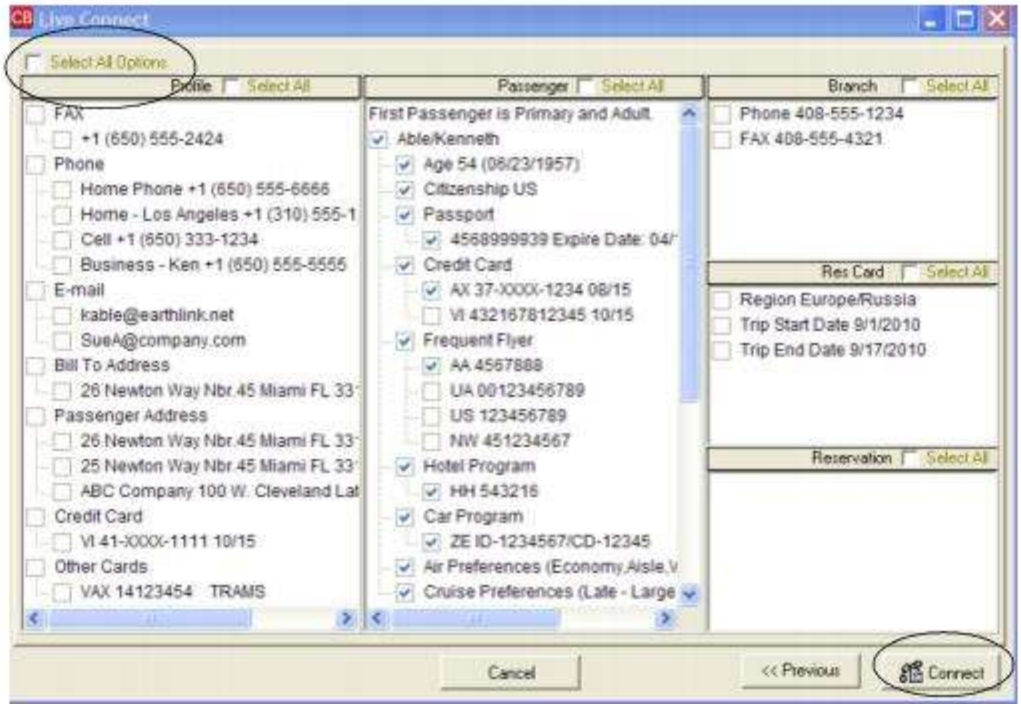
Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. If you do not know which vendor you will be using, click the Live Connect icon at the Res Card Level.



If you do know which vendor you will be using, click *Add Reservation* to start a new reservation. Select a *Vendor, the Travel Category,* and then click *Live Connect*.

Select *Sabre Cruises* from the drop-down by *Connect To.* ***Do not enter login information here*** and click *Create New Reservations****.***

Step 2) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 3) You arrive at the Sabre Cruise login page where you are prompted to use your regular Sabre login, password and PCC (Pseudo City Code in the *Agency Code* field). (If you do not clear your cache, you will not have to login again for a significant period of time.)

Step 4) Although still in *ClientBase*, you are now on-line at the Sabre Cruises booking site.

Complete your reservation as you normally would using Sabre Cruises' booking features. If you are not familiar with how to use Sabre Cruises booking tools, please contact your Sabre Software Help Desk, or access on-line documentation and virtual training via the eServices website. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* Reservation record.

NOTE: The following Sabre Cruises cruise lines only accept US residents when using immigration data. If traveler is not a US resident, you are unable to complete the reservation.

* Crystal Cruises

* Norwegian Cruise Lines

* Regent Seven Seas Cruises

* Seabourn Cruise Line

Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in Sabre Cruises website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Sabre Vacations - US

If you are a Sabre subscriber, sign up with Sabre Vacations by clicking the *Sabre Vacations* button from either the *Travel Products* menu on the Sabre Red agent booking portal, or via the Sabre Vacations community page on the Agency eServices information website. Sabre Vacations is a private labeled version of VAX VacationAccess and by using Sabre Vacations Live Connect you receive credit towards your Sabre productivity agreement for each booking!

Take these steps is you are not a Sabre subscriber:

1) Every *ClientBase* customer is a Sabre customer and has a PCC. If you know your PCC, go to Step 2 below. If you do not know your PCC, email Trams.Implementation@sabre.com to obtain it.

2) Once you know your Sabre PCC, contact leisure.epr@sabre.com to get a temporary password. You will be able to change the temporary password once you log in the first time at https://login.vaxsbr.vaxvacationaccess.com/default.aspx. If additional users are needed send a reply via email to leisure.epr@sabrecom when you receive your temporary password or you can do so at the Sabre Vacations website.

3) If a passcode reset/reactivation is needed (because you are locked out), contact leisure.epr@sabre.com or call 800-413-5771.

4) Once you have obtained password/s, you can start using Sabre Vacations once you have completed setting up *ClientBase* for use with Sabre Vacations.Anyone can use Sabre Vacations - US for Live Connect, but you must be registered.

Set Up Sabre Vacations

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for Sabre Vacations exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter Sabre Vacations.

URL: https://login.www.vaxvacationaccess.com/default.aspx

Travel Category: Select *Tour* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) The Sabre PCC must be supplied in the Agency Code field upon logging in. To enter the PCC, go to **Global Defaults|Res Card Defaults|Live Connect Login** and click *Add:*

(No other user login information is passed.)

Step 3) When registering, Sabre Vacations provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify Sabre Vacations as the booking engine and enter the unique vendor identifier.

F**irst clic**k *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select Sabre Vacations from the drop-down menu and enter the Sabre Vacations vendor code. (If you are using Sabre Vacations Dynamic, enter its unique vendor identifier.)

Sabre Vacations - Dynamic Participating Vendors and Vendor Codes

CODE	VENDOR NAME	LIVE CONNECT PROVIDER
AET	American Express Vacations	Sabre Vacations
BST	Blue Sky Tours	Sabre Vacations
FJ1	Funjet Vacations	Sabre Vacations
MMT	MGM Mirage Vacations	Sabre Vacations
PRV	Palace Resorts	Sabre Vacations
SAB	Sandals and Beaches Resorts	Sabre Vacations
WNT	Southwest Airlines Vacations	Sabre Vacations
TPV	TNT Vacations powered by Funjet	Sabre Vacations
TIM	Travel Impressions	Sabre Vacations
UNT	Universal Parks and Resorts Vacations	Sabre Vacations
AMW	US Airways Vacations	Sabre Vacations
VE1	Vacations Express	Sabre Vacations

Sabre Vacations Features

Sabre Vacations supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

__ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

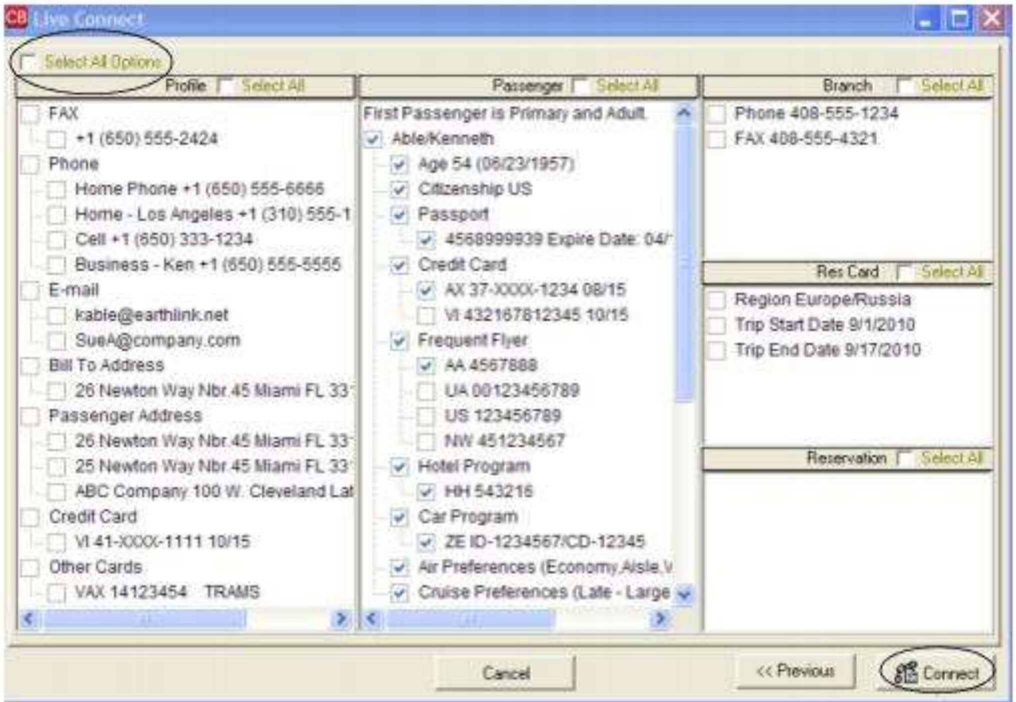
Create New Sabre Vacations Reservation

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. If the vendor is unknown, click *Live Connect* in the lower right hand corner of the main Res Card screen to launch from the Res Card level.

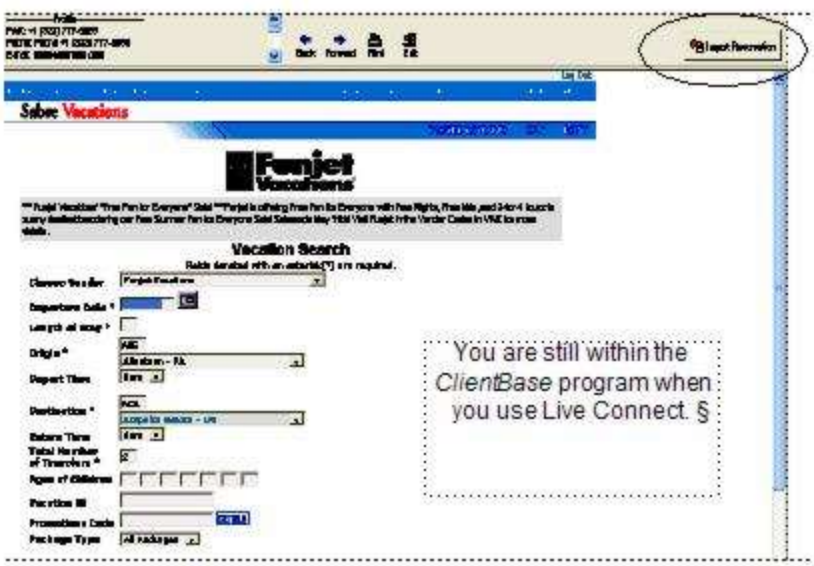
If you know the vendor, click *Add Reservation* to start a new reservation. Fill in the *Travel Category* and *Vendor* fields and then click *Live Connect*.

Step 2) Select the Sabre Vacations from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the Sabre Vacations booking site. Complete your reservation as you normally would using Sabre Vacations' booking features. If you are not familiar with how to use Sabre Vacations booking tools, please contact your Sabre Software Help Desk, or access on-line documentation and virtual training via the eServices website. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* Reservation record.



Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in Sabre Vacations website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Sabre Vacations - Canada

Anyone can use Sabre Vacations - Canada for Live Connect, but you must be registered.

Step 1) All Trams ClientBase customers have been assigned a unique Sabre PCC. If you do not know your Sabre PCC, e-mail Trams.Implementation@sabre.com to obtain it. If you do know your Sabre PCC, go to Step 2.

Step 2) You **must** register to obtain a Sabre Vacations Canada login and password.   To register, e-mailing sabrevac.ca@sabre.com with the subject line – *Sabre Vacations Canada Registration*. Include the following information: *Sabre PCC, Agency Name, Agency Owner, Agency Address, IATA/TIDS Number, Agency Phone number used to register accounts with the tour operators, the site administrator's e-mail address, and a list of all Tour Operators you are registered with.* Once you have obtained your Sabre Vacations Canada login and password, go to Step 3

Step 3) Set up accounts with each Tour Operator(s) for billing purposes and inform each Tour Operator(s) you will be booking through Sabre Vacations Canada (see Tour Operator list below). If you are already registered and set up with your Tour Operator(s), at this point, you may only need to advise them of your intentions to book through Sabre Vacations Canada.

Step 4) To activate your **Live Connect**, email sabrevac.ca@sabre.com with the subject line – *Sabre Vacations Canada Live Connect Activation*. Include your Agency Name, Sabre PCC and Agency Phone Number. **Please note, Live Connect will not function without completing this step.**

If you are experience any problems with this Sabre Vacations Canada setup, contact Sabre support at sabrevac.ca@sabre.com.

Additional Set Up in ClientBase for Sabre Vacations - Canada

Step 1) Create a Live Connect Provider for Sabre Vacations - Canada if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Enter Sabre Vacations - Canada.

URL: Enter **https://secured.softvoyage.com/cgi-bin/sab/entrance.cgi**

Travel Category: Select *Tour* from the drop-down.

Import XML from: Select *HTML Source.*

Click *OK* to save.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password, account number, and agency code), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Sabre Vacations - Canada from the drop-down list.

User Name, Password: Enter the necessary fields based upon the login information provided to you when you contacted Sabre Vacations - Canada.

Account Number: Leave blank.

Agency Code: Enter your Pseudo City Code.

Step 3) When registering, Sabre Vacations - Canada provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify Sabre Vacations - Canada as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select Sabre Vacations - Canada from the drop-down menu and enter the Sabre Vacations - Canada vendor code.

Sabre Vacations - Canada Tour Operator List

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
ACV	Air Canada Vacations	Sabre Vacations - Canada
VAT	Air Transat Holidays	Sabre Vacations - Canada
ALB	Alba Tours	Sabre Vacations - Canada
CJV	Canjet	Sabre Vacations - Canada
FUN	Fun Sun Vacations	Sabre Vacations - Canada
NOL	Nolitours	Sabre Vacations - Canada
SGN	Signature Vacations	Sabre Vacations - Canada
SQV	Sunquest Vacations	Sabre Vacations - Canada
SWG	Sunwing	Sabre Vacations - Canada
THN	The Holiday Network	Sabre Vacations - Canada
TTT	Titan Tours	Sabre Vacations - Canada
TMR	Tours Mont-Royal	Sabre Vacations - Canada
TMA	Tours Mason/Vacances Sunquest	Sabre Vacations - Canada
VAT	Transat Holidays	Sabre Vacations - Canada
VAR	Varaplaya	Sabre Vacations - Canada
WJV	West Jet Vacations	Sabre Vacations - Canada

Live Connect Features Supported by Sabre Vacations - Canada

Sabre Vacations - Canada supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

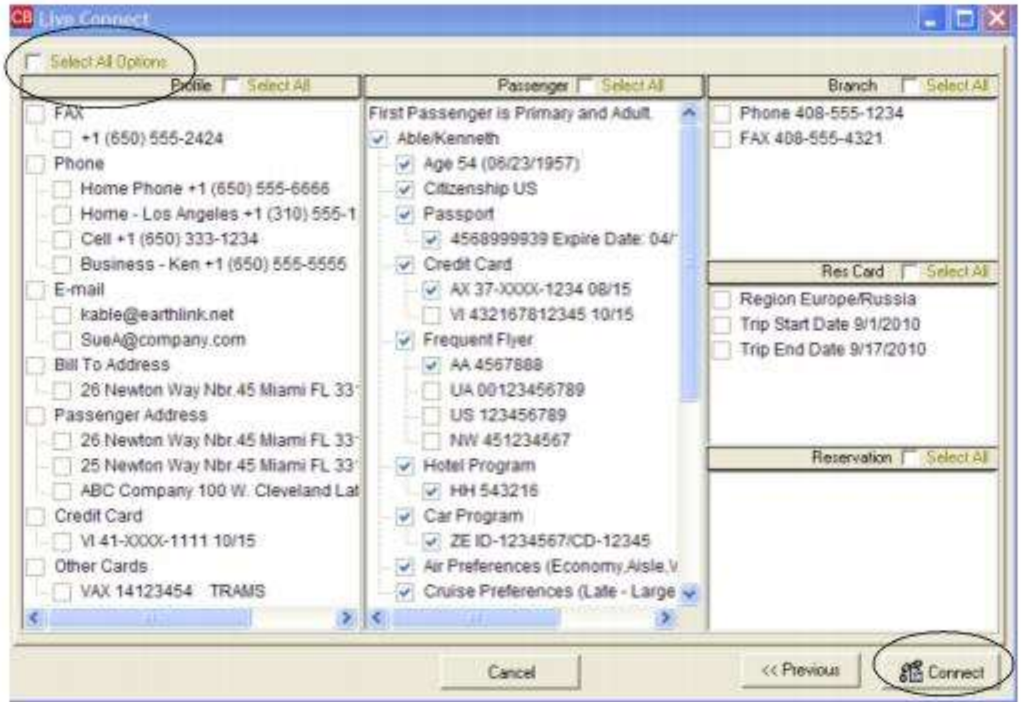
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Reservation Using Live Connect

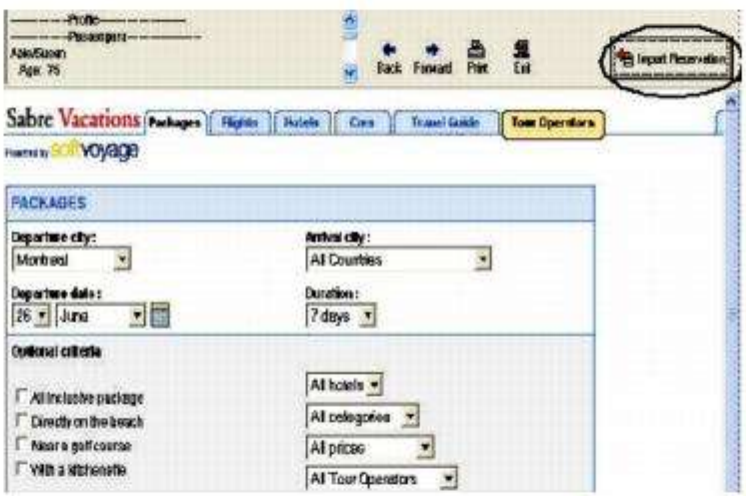
Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. Click *Add Reservation* to start a new reservation. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect*.

Step 2) Select the Sabre Vacations - Canada from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the Sabre Vacations - Canada booking site. Complete your reservation as you normally would using Sabre Vacations - Canada's booking features. If you are not familiar with how to use Sabre Vacations - Canada booking tools, please contact your Sabre Software Help Desk, or access on-line documentation and virtual training via the eServices website. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* reservation record.



ShoreTrips

If you are not currently registered to book ShoreTrips, go to www.shoretrips.com and click the *New Account* link at top of page. You may also call 888.355.0220 to register. After receiving a User ID and Password, use the following steps to setup ClientBase.

Set Up ShoreTrips

Step 1) Create a Live Connect Provider for ShoreTrips if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Enter ShoreTrips.

URL: Enter **https://www.shoretrips.com/integration/liveconnect**

Travel Category: Enter *Tour* from the drop-down menu.

Import XML from: Use the default, HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name and password), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select ShoreTrips from the drop-down list.

User Name: Enter ShoreTrips assigned user name.

Password: Enter the ShoreTrips assigned password.

Account Number/Agency Code: N/A.

Set Up Individual Agent Login Information: Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

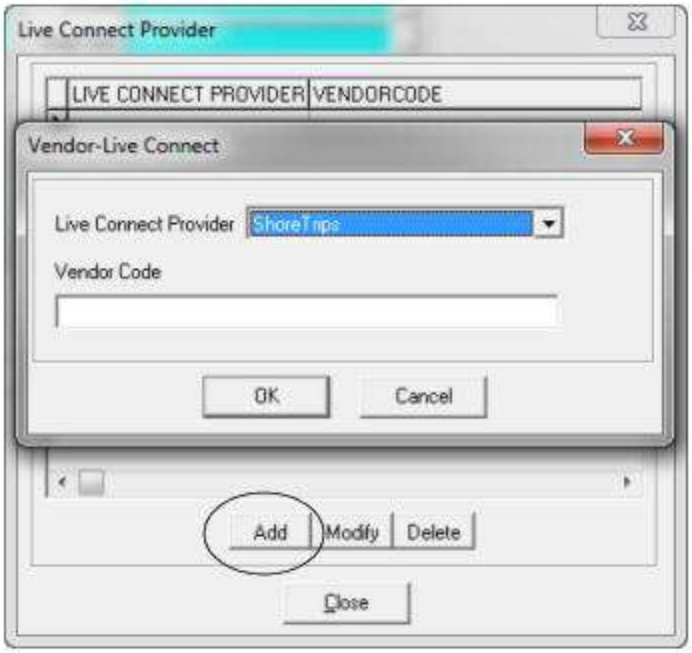
Live Connect Provider: Select ShoreTrips from the drop-down list.

User Name: Enter ShoreTrips assigned user name.

Password: Enter the ShoreTrips assigned password.

Account Number/Agency Code: N/A.

Step 3) Create a vendor profile for ShoreTrips. From the General Info tab, select *Tour* from the drop-down as the *Travel Category,* and click *Live Connect Providers*.



Click *Add,* and select ShoreTrips from the drop-down list. The vendor code is left blank.

ShoreTrips Features

ShoreTrips supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION** (Launch, Book & Import New Reservation)

- ✓ Automatically logs you in to booking engine with User Login data from *ClientBase.*
- ✓ Populates booking engine with profile data from *ClientBase.*
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION** (Imports new reservation booked outside of *ClientBase*)

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

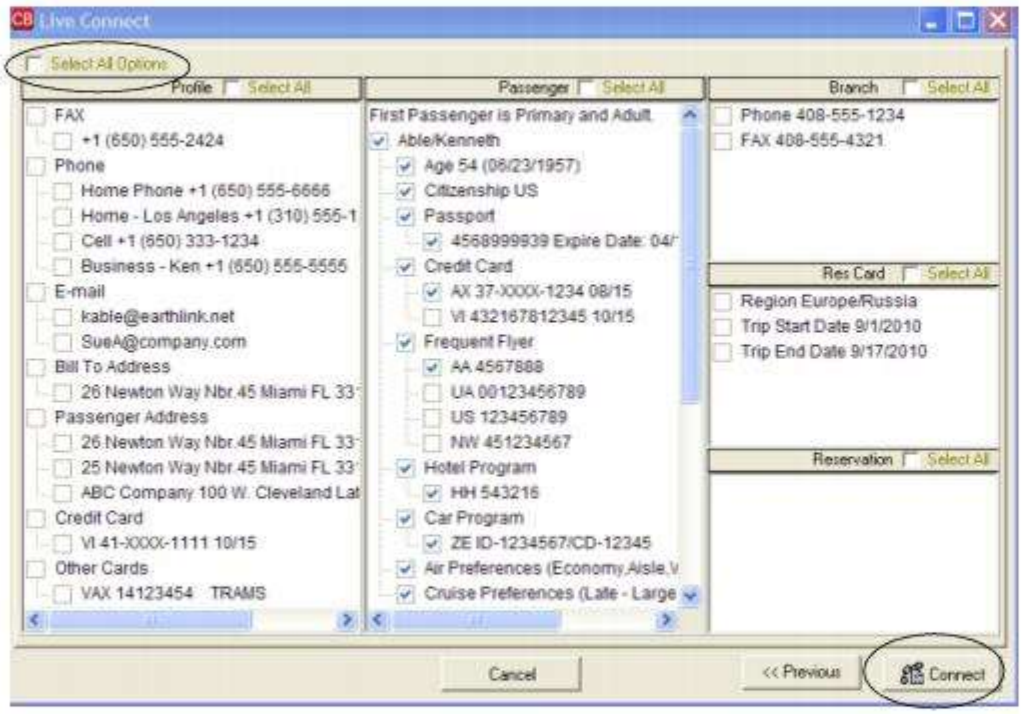
✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create ShoreTrips New Reservation

Step 1) When ready to book on-line, create a client's Res Card and fill in the *Agent/Branch, Status, Reservation Cycle, Region/Destination,* and *Trip Name* fields, and select the travelers.

Step 2) Click *Add Reservation* to start a new reservation. Fill in the *Vendor* and *Travel Category* fields and Live Connect should launch...if not click *Live Connect.*

Step 3) Select customer data to book the reservation *(Traveler, Credit Card*, *Phone,* and *Billing Address),* click *Connect:*



Step 4) Although still in *ClientBase*, you are now on-line at the ShoreTrips booking site. Complete the reservations using instructions supplied by ShoreTrips.

Step 5) Upon completion of the reservation and on the confirmation page, click

Import Reservation and all reservation details are imported back into the *ClientBase* reservation record.

Need ShoreTrips help? Email: igotaquestion@shoretrips.com

Phone: 888-355-0220 - The support staff is available 7 days a week and answers the phone during the hours below. If contacted during off hours, we have a live answering service that takes a message or contacts the assigned staff member in an emergency situation.

Mon-Thu 8am - 8pm

Fri 8am - 6pm

Sat 9am - 3pm

Sun 11am - 4pm

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number if known, or leave blank. If a confirmation number is entered, the system automatically retrieves and imports the reservation. If not known, when in ShoreTrips, click *My Stuff*|*My Bookings* to locate the reservation. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase* reservation record.

Signature CruiseConnection

This feature is only available to agencies who belong to Signature Travel Network as the CruiseConnection booking engine is exclusive to this group. For more information on CruiseConnection or Signature Travel Network, please contact Signature Travel Network directly at info@signaturetravelnetwork.com.

Signature members can log into the Signature Intranet, http://www.signaturetravelnetwork.com, and find setup instructions under *Support Training & Meetings*, in the *Communications* section. Scroll down to *Signature Hotels & Resorts* and access the setup document.

Set Up Signature CruiseConnection Live Connect in *ClientBase*

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Insure you have Signature CruiseConnection set up correctly as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add* or *Modify*.

Provider Name: Type Signature CruiseConnection.

URL: Type **https://cruiseconnection.signaturetravelnetwork.com/LiveConnect/login.cfm**

Travel Category: Select *Cruise* from the drop-down.

Import XML from: Select *HTML Source.*

Include Authentication: Not applicable.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select Signature CruiseConnection from the drop-down menu.

User Name and Password: Enter global Signature intranet login name and password here.

Account Number: Leave blank.

Agency Code: Enter agency's Signature agency key number here. Find this number on the agency profile in the Signature intranet. Click "Agency Tools" in the upper right, and find the "Agency Key" number on the right side of the profile. Click *OK* to save.

Set Up Individual Agent Login Information: Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Signature CruiseConnection from the drop-down menu.

User Name and Password: Enter global Signature intranet login name and password here.

Account Number: Leave blank.

Agency Code: Enter agency's Signature agency key number here. Find this number on the agency profile in the Signature intranet. Click "Agency Tools" in the upper right, and find the "Agency Key" number on the right side of the profile. Click *OK* to save.

Step 4) When registering, Signature CruiseConnection provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify Signature CruiseConnection as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select Signature CruiseConnection from the drop-down menu and enter the vendor code.

Signature CruiseConnection Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***

CV	**Carnival Cruise Lines**	**Signature CruiseConnection**
CB	**Celebrity Cruises**	**Signature CruiseConnection**
CO	**Costa Cruise Lines**	**Signature CruiseConnection**
CS	**Crystal Cruises**	**Signature CruiseConnection**
CU	**Cunard Cruises**	**Signature CruiseConnection**
DS	**Disney Cruise Line**	**Signature CruiseConnection**
HA	**Holland America Line**	**Signature CruiseConnection**
IC	**Island Cruises**	**Signature CruiseConnection**
NC	**Norwegian Cruise Line**	**Signature CruiseConnection**
PC	**Princess Cruises**	**Signature CruiseConnection**
RE	**Regent Seven Seas Cruises**	**Signature CruiseConnection**
RC	**Royal Caribbean International**	**Signature CruiseConnection**
VR	**Viking River Cruises**	**Signature CruiseConnection**

Signature CruiseConnection Features

Signature CruiseConnection supports the following Live Connect Features:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)¶**

__ Automatically logs you in to booking engine with User Login data from *ClientBase*.¶

✓ Populates booking engine with profile data from *ClientBase*.¶

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.¶

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)¶**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.¶

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.¶

✓ **RETRIEVE RESERVATION** - Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.§

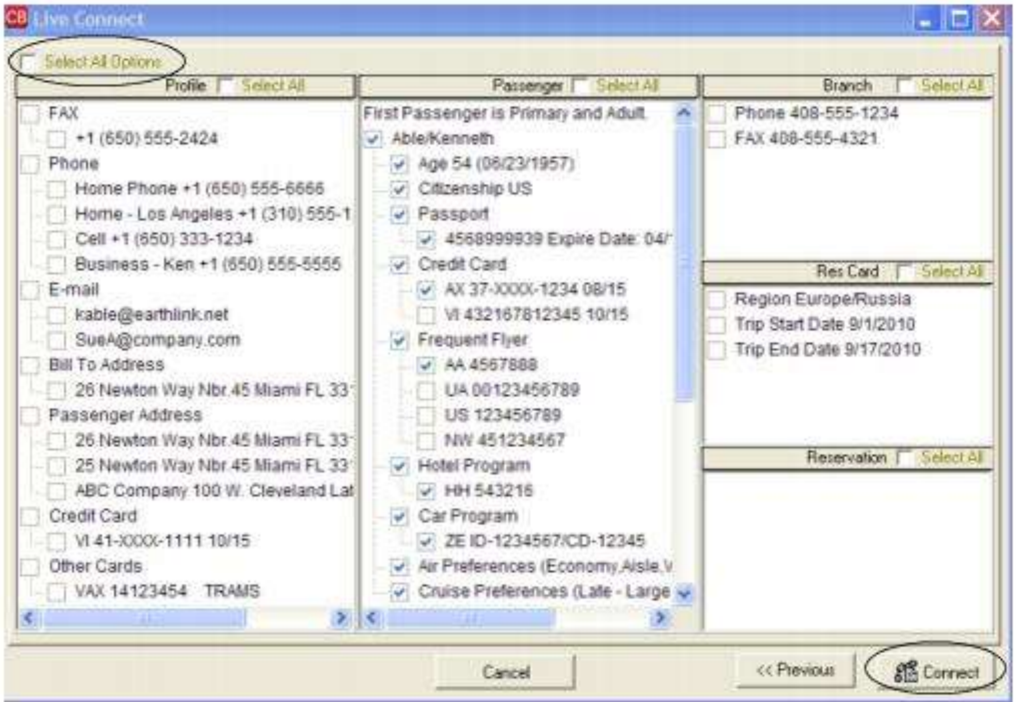
Create New Signature CruiseConnection Reservation

Step 1) Once the setup steps have been completed, retrieve the desired client profile and start or retrieve a Res Card. If the cruise vendor is unknown, click *Live Connect* in the lower right hand corner of the main Res Card screen to launch Signature CruiseConnection right from the Res Card level.

If you do know the vendor, use *Add Reservation* to start a new reservation at the reservation level. From within the *ClientBase* reservation record, select the desired cruise line as the vendor, fill in the *Travel Category* and click *Live Connect* to launch Signature CruiseConnection.

Step 2) Verify the default login information and select *Create New Reservation*. A window appears with default CruiseConnection login information. The *Connect To* should read Signature CruiseConnection. If it does not, click the drop-down arrow and select it from the list. Any of the login information defaulting in this window can be changed if desired. Click *Create New Reservations* to book a new reservation.

Step 3) Prior to connecting to the Signature CruiseConnection site, a client selection screen appears to select the desired client data to automatically pass to Signature CruiseConnection. Passing this data saves time during the booking process, as fewer fields need to be completed by hand.



Step 4) Use Cruise Finder to find the "perfect cruise". Proceed into CruiseConnection by clicking *Check Availability for All Categories* below the pricing section of each offer. When prompted for traveler information, select each traveler using the CruiseConnection *Search for a Client* feature. Or, if the client is not in the Signature database, use *Click Here to Add New Client* for each traveler traveling.

Step 5) Use CruiseConnection to finish confirming the reservation and upon receiving a confirmation number, click *Import* to bring all the reservation details into *ClientBase*. Use *Connect* to connect to Signature CruiseConnection. The CruiseConnection program looks just as it does when used outside of *ClientBase*, but is running within a *ClientBase* window. Now use CruiseConnection to complete the cruise reservation.

Notice how the client information screens get completed automatically. Upon completion of the reservation and upon receiving a confirmation number, use *Import Reservation*, located at the top right corner of the window, and all reservation details are imported back to the *ClientBase* reservation record. This reservation information is now available to invoice, to create Reminders to track the administrative tasks involved in managing the trip and to report on for future marketing purposes.

Import Existing CruiseConnection Reservation Made Outside of *ClientBase*

First, create a new reservation in *ClientBase* and after clicking entering vendor information, click *Live Connect* and *Import an Existing Reservation.* Do not enter a confirmation number, but when in Signature Travel Network booking site, locate the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Signature HotelConnection

This feature is only available to agencies who belong to Signature Travel Network as the Signature HotelConnection booking engine is exclusive to this group. Signature members can log into the Signature Intranet, www.signaturetravelnetwork.com, and find setup instructions under Support Training & Meetings, in the Communications section. Just scroll down to "Signature Hotels & Resorts" and access the setup document. For more information on Signature HotelConnection or Signature Travel Network, please contact Signature Travel Network directly at info@signaturetravelnetwork.com.

Set Up Signature HotelConnection

Step 1) Create a new or check that a Live Connect Provider for Signature HotelConnection exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter Signature HotelConnection.

URL: Enter **https://web2.sigtn.com/liveconnecthotel/login.cfm**

Travel Category: Select Hotel from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Each agent can set up a login for HotelConnection by going to **Utilities|My Login** and clicking on the Live Connect tab. Click *Add* and enter the following information:

Live Connect Provider: Select Signature HotelConnection from the drop-down list.

User Name, Password and Account Number: Enter your Signature Intranet user Name and Password. There is no account number.

Step 3) Create a vendor profile for Signature Hotels if you do not want to use individual hotel profiles when launching Live Connect. (See below for detailed instructions on this.) From the Profile Manager, create a new profile called *Signature Hotels.* From the General Info tab, click Live Connect Providers. From here, click *Add*, and select Signature HotelConnection from the drop-down list. The vendor code is left blank. Click *OK* to save.

Signature HotelConnection Features

Signature HotelConnection support the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

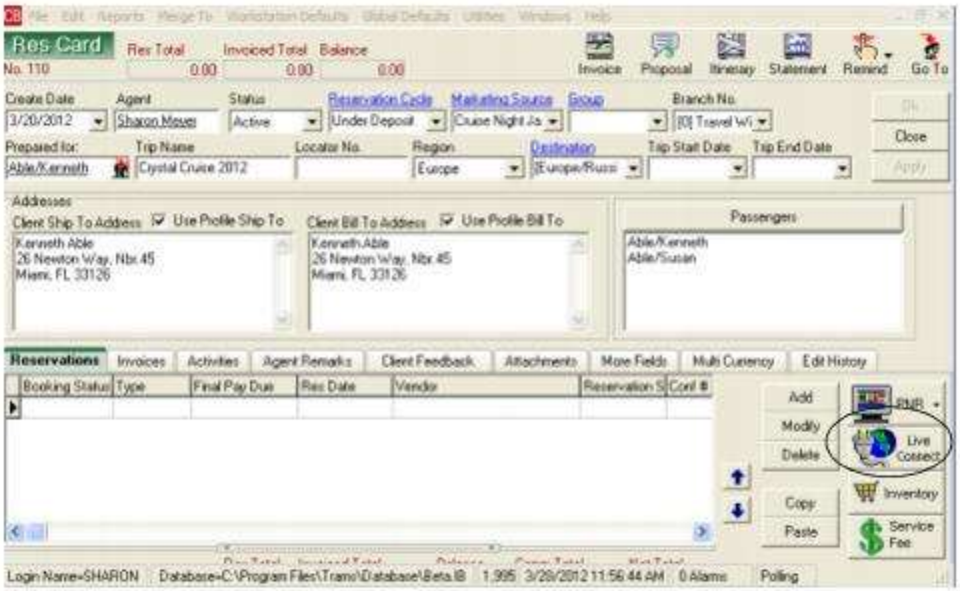
- __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Signature HotelConnection Reservation

Step 1) Use the *ClientBase* Res Card to launch Signature HotelConnection.

Once the setup steps have been completed, retrieve the desired client profile and start or retrieve a Res Card. If you do not know the hotel vendor you will be using, click the Live Connect button in the lower right hand corner of the main **Res Card screen** to launch Signature HotelConnection right from the Res Card level.



Upon completion of the hotel reservation, the system will have you search for the hotel profile you have booked. If you do not find it in your system after you have queried, you must create a hotel profile by clicking **File|New|Vendor Profile.** (Make sure you click the Live Connect button in the Vendor Profile before you save it to link Signature HotelConnection to it by clicking *Add.* Next time you need to use this profile, it'll be in the system.)

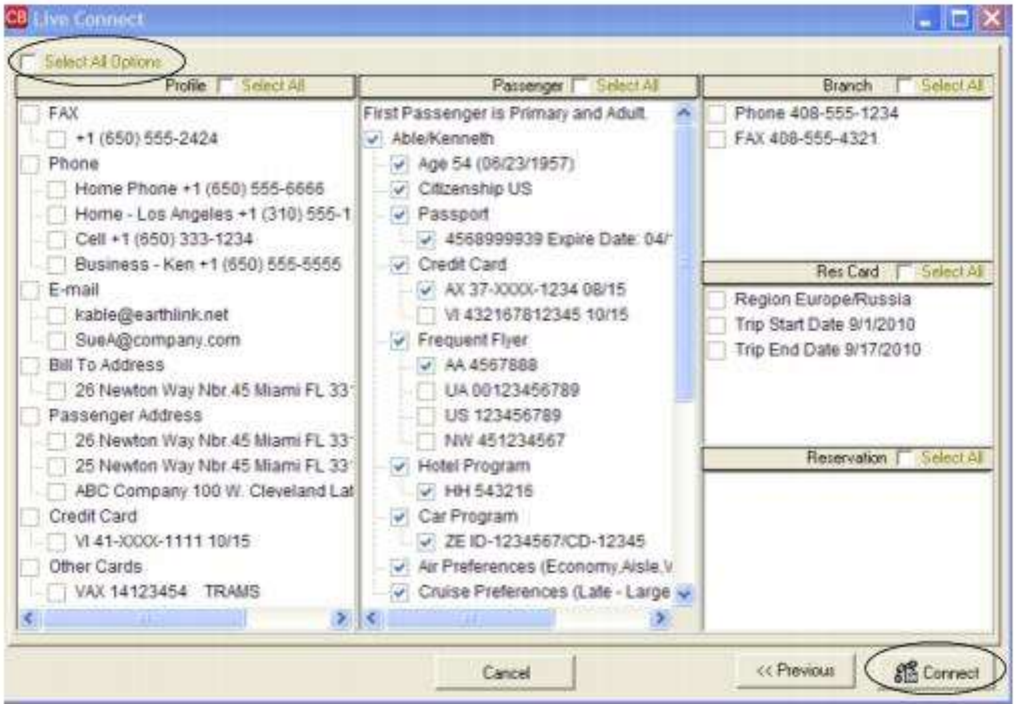
If you want to use the Signature Hotels profile you created for all hotel bookings you book through HotelConnection, so you don't have to search for existing hotel profiles or create new ones when importing the reservations, use the *Add Reservation* button to start a new Reservation.

From within the *ClientBase* Reservation record, select *Signature Hotels* as the Vendor and click the Live Connect button to launch Signature HotelConnection. When imported back into the system, the hotel you booked will populate the Service Provider area of the reservation.

Step 2) Verify the default Login information and select "Create New Reservation".

A window appears with your default HotelConnection login information. The Connect To should read Signature HotelConnection. If it does not, click the drop down arrow and select it from the list. Any of the login information defaulting in this window can be changed if desired. Use the *Create New Reservations* button to book a new reservation.

Step 3) Select the desired client information to pass to HotelConnection. Prior to connecting you to the Signature HotelConnection site, a client selection screen appears, allowing you to select the desired client data you would like to automatically pass to Signature HotelConnection. Passing this data helps you save time during the booking process, as fewer fields need to be completed by hand.



Step 4) Use Hotel Finder to find the "perfect hotel". When prompted for traveler information select each traveler using the HotelConnection "Search for a Client" feature. Or, if the client is not in the Signature database, use "Click Here to Add New Client" for each traveler traveling.

Step 5) Use HotelConnection to finish confirming your Reservation and upon receiving a confirmation number click "Import" to import the reservation details into your *ClientBase* database for managing further. Remember if you have launched Live Connect at the Res Card level so you can use separate Hotel Vendors, the system will have you search for the hotel profile you have booked. If you do not find it in your system after you have queried, you must create a hotel profile by clicking **File|New|Vendor Profile.** (Make sure you click the Live Connect button in the Vendor Profile before you save it to link Signature HotelConnection to it by clicking *Add.* Next time you need to use this profile, it'll be in the system.)

If you used the Signature Hotels Profile at the reservation level to launch Live Connect, the hotel booking will come into *ClientBase* with the hotel name in the Service Provider area of the reservation.

This reservation information is now available for you to invoice, to create Reminders to track the administrative tasks involved in managing the trip and to report on for future marketing purposes.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation in *ClientBase* and after clicking *Add a New Reservation* and entering vendor information, click *Live Connect* and *Import an Existing Reservation.* Do not enter a confirmation number, but when in Signature HotelConnection booking site, locate the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Squaremouth Travel Insurance

To use Live Connect to purchase trip insurance with Squaremouth Travel Insurance, you must obtain a Travel Partner Number to sell Squaremouth Travel Insurance. If not currently licensed to sell Squaremouth Travel Insurance, contact Squaremouth Travel Insurance directly at 800-240-0369 or sign up on their website at http://www.squaremouth.com/travel-partner-signup.php.

Set Up Squaremouth Travel Insurance

Once you obtain your Affiliate Number, take the following steps to setup *ClientBase* for Live Connect:

Step 1) Create a new or check that a Live Connect Provider for Squaremouth Travel Insurance exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter Squaremouth Travel Insurance.

URL: Enter **https://www.squaremouth.com/travel-insurance/**

Travel Category: Select Insurance from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select Squaremouth Travel Insurance from the drop-down list.

User Name, Password and Account Number: Leave User Name & Password blank. In *Account Number,* enter your *Affiliate Number* you obtained from Squaremouth Travel Insurance.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Squaremouth Travel Insurance from the drop-down list.

User Name, Password and Account Number: Leave User Name & Password blank. In *Account Number,* enter your *Affiliate Number* you obtained from Squaremouth Travel Insurance.

Step 3) Create a vendor profile for Squaremouth Travel Insurance. From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select the desired booking engine (Squaremouth Travel Insurance) from the drop-down list. The vendor code is left blank.

Step 4) Set up insurance prompting by going to **Global Defaults|Res Card Defaults|Insurance Prompting**. (See chapter, *Setting Up ClientBase for Your Agency*.)

Squaremouth Travel Insurance Features

Squaremouth Travel Insurance supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

__ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

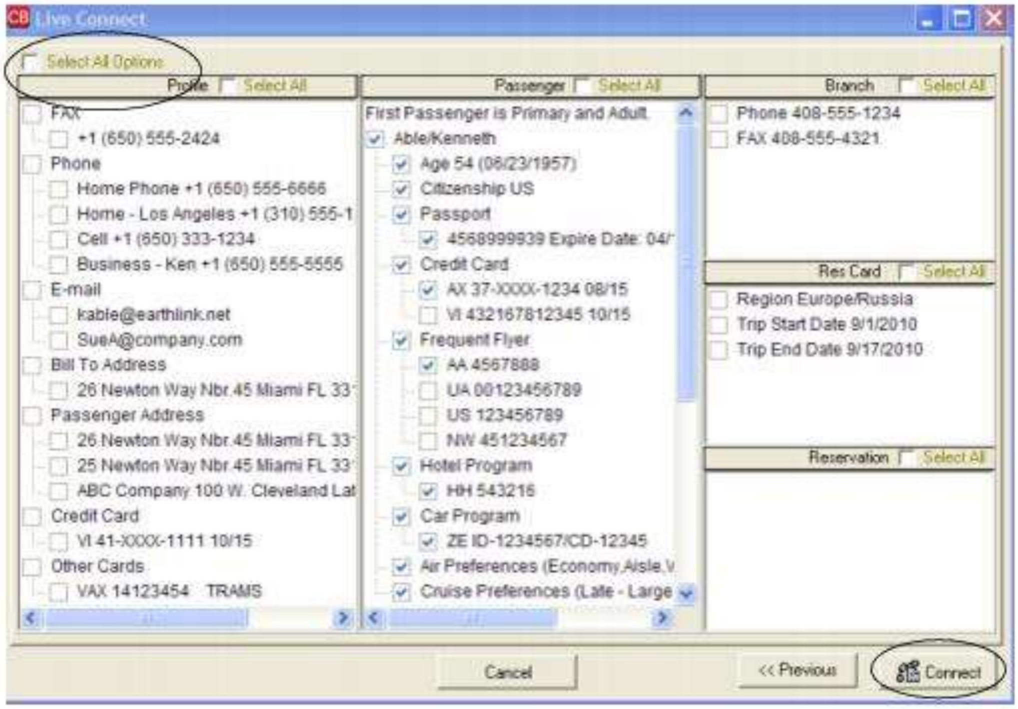
__ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

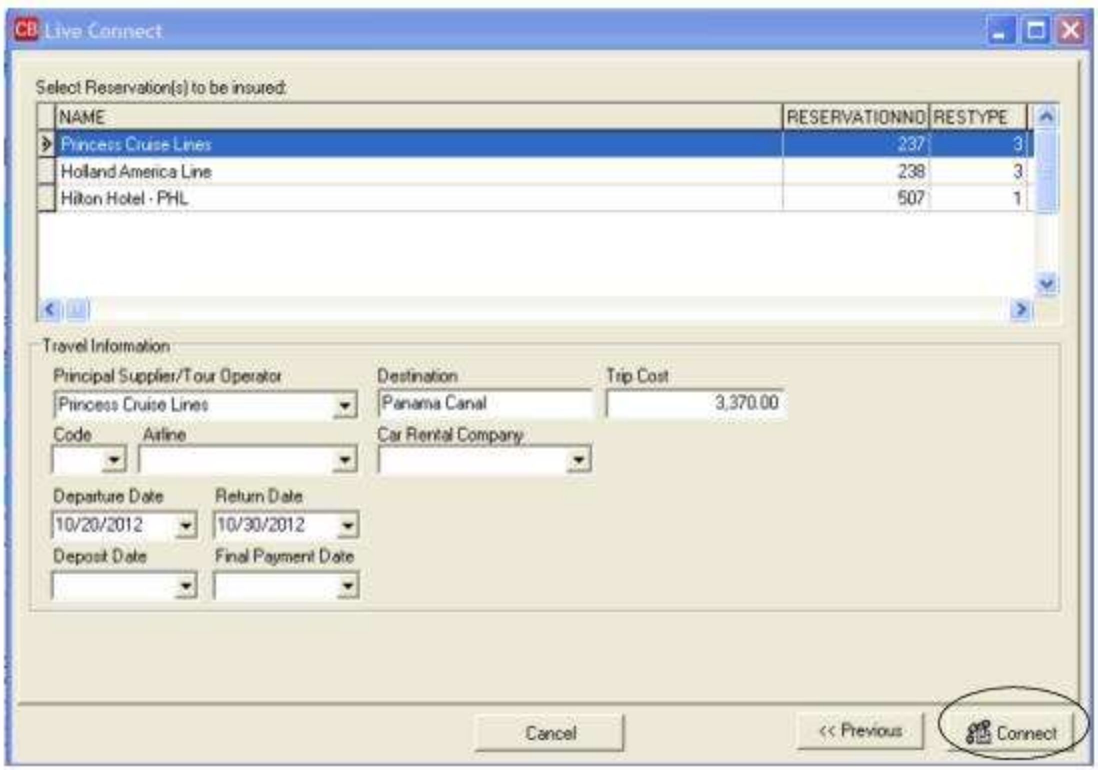
Create New Squaremouth Travel Insurance Reservation

Step 1) When ready to book on-line, create a client's Res Card and fill in the *Agent, Status, Reservation Cycle, and Trip Name* fields and select the travelers. Click the reservation tab and *Add*. Fill in the Vendor and Travel Category, and click *Live Connect* and *Create New Reservations:*

Step 2) Select any customer information for use to book the Squaremouth Travel Insurance reservation. This data is automatically passed to Squaremouth Travel Insurance and saves time during the booking process, as less fields need to be completed manually. Click *Connect.*



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations, use the CTRL key in combination with clicking. Again, this step is designed to save time during the insurance booking process, as less fields need to be completed manually. Any missing or incomplete data can be updated on the Squaremouth Travel Insurance website confirming the insurance booking. Click *Connect*.



Step 5) Although still in *ClientBase*, you are on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation* and all reservation data booked on-line is now located in the reservation in *ClientBase*.

Tandem from Passport Online

Tandem from Passport Online is an on-line cruise booking engine. To contact Tandem from Passport Online for use, e-mail sales@passportonlineinc.com or call (503) 626-7766 Ext. 1. After successfully completing registration, obtain a unique user name, and password for use in *ClientBase*.

Set Up Tandem from Passport Online Live Connect in *ClientBase*

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Since we are releasing Tandem from Passport Online between *ClientBase* releases, set it up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type Tandem from Passport Online.

URL: Type **https://secure.latesttraveloffers.net/apps/portal/cbcollect.asp**

Travel Category: Select *Cruise* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select Tandem from Passport Online from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted provider. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Set Up Individual Agent Login Information: To set up Live Connect for **each** user login, click the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Tandem from Passport Online by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Live Connect Provider: Select Tandem from Passport Online from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted provider. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Step 3) When registering, Tandem from Passport Online provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify Tandem as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select Tandem from Passport from the drop-down menu and enter the vendor code.

Tandem from Passport Online Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
AZA	Azamara Cruises	Tandem from Passport Online
CCL	Carnival Cruise Lines	Tandem from Passport Online
CEL	Celebrity Cruises	Tandem from Passport Online
CST	Costa Cruise Lines	Tandem from Passport Online
CUN	Cunard Cruises	Tandem from Passport Online
HAL	Holland America Line	Tandem from Passport Online
MSC	MSC Cruises	Tandem from Passport Online
NCL	NCL America	Tandem from Passport Online
NCL	Norwegian Cruise Lines	Tandem from Passport Online
OCL	Oceania Cruises	Tandem from Passport Online
PCL	Princess Cruises	Tandem from Passport Online
RCC	Royal Caribbean International	Tandem from Passport Online
SBN	Seabourn Cruise Line	Tandem from Passport Online

Live Connect Features Supported by Tandem from Passport Online

Tandem supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

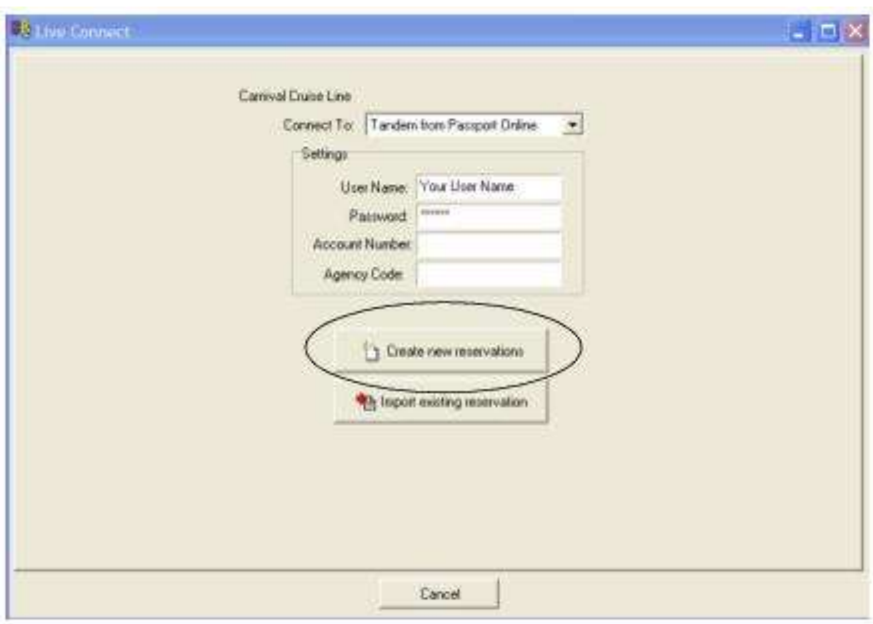
✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

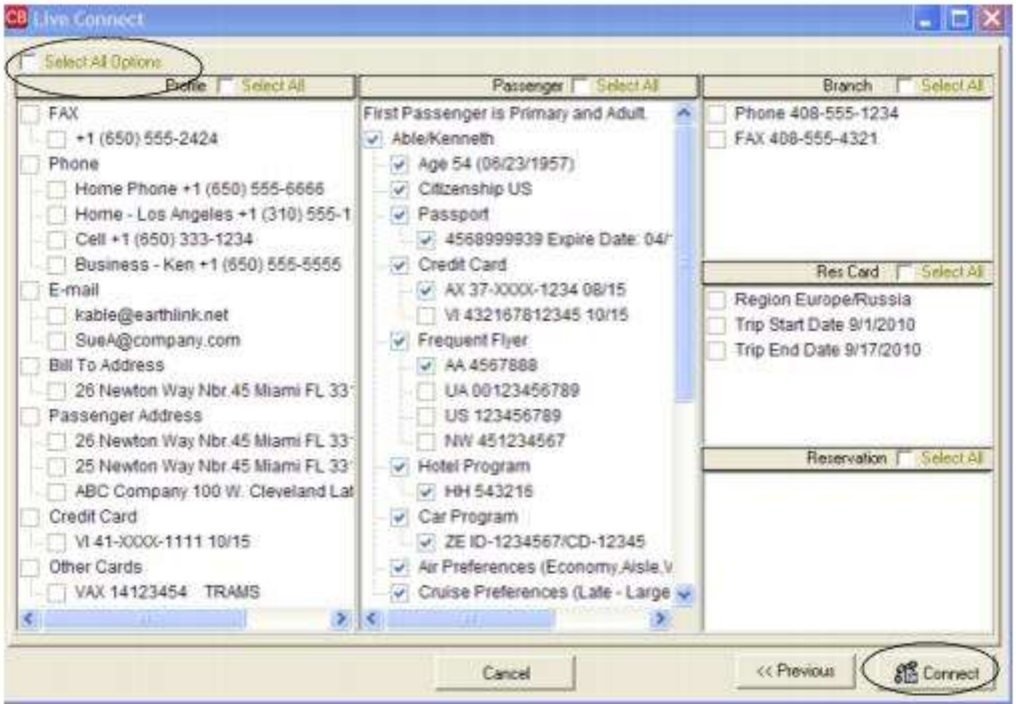
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. Click *Add Reservation* to start a new reservation. Select the *Vendor*, *Travel Category* and then click *Live Connect*.

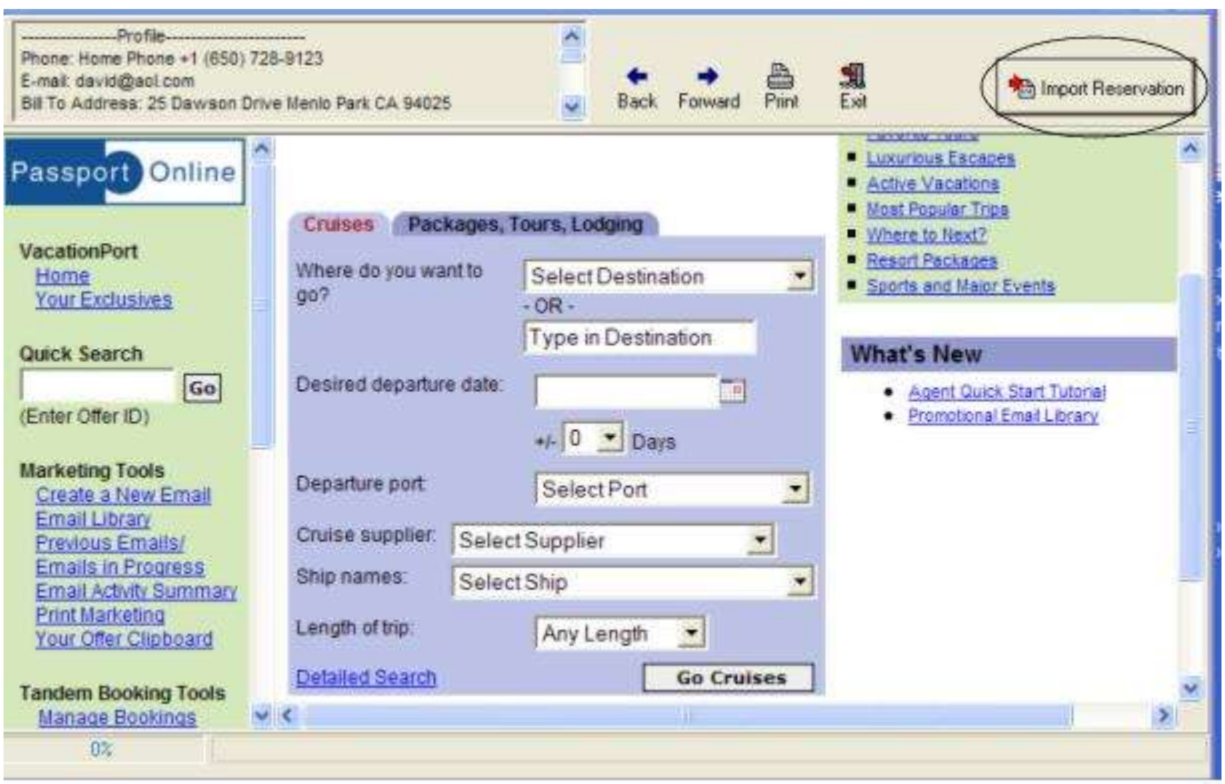
Select *a Tandem from Passport Online vendor* from the drop-down by *Connect To; i.e. Carnival* and click *Create New Reservations.*



Step 2) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 3) Although still in *ClientBase*, you are now on-line at the Tandem from Passport Online booking site. Complete your reservation as you normally would using Tandem's booking features. If you are not familiar with how to use Tandem booking tools, please contact tandem@passportonlineinc.com **or call 503 270 5859**. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* Reservation record.



Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in Tandem from Passport Online website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

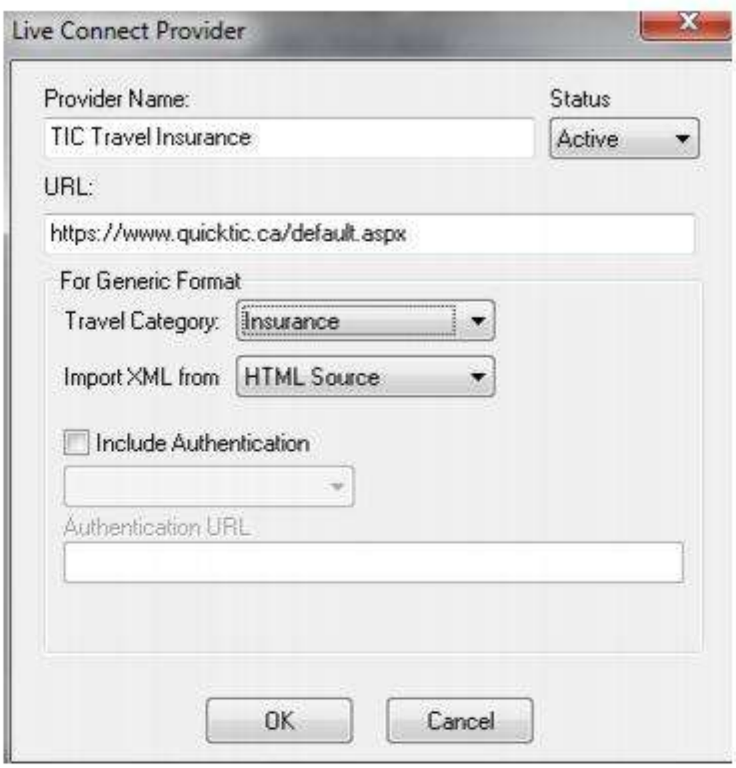
TIC Travel Insurance

You must be an existing TIC advisor to use to book online with Live Connect.

Set Up TIC Travel Insurance

Upon receiving TIC onboarding, take the following steps to setup *ClientBase* Windows for Live Connect.

Step 1) Create a Live Connect Provider for TIC Travel Insurance if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)



Provider Name: Enter TIC Travel Insurance.

URL: Enter **https://www.quicktic.ca/default.aspx**

Travel Category: Insurance

Import XML from: N/A

Step 2) Next, setup the TIC Travel Insurance vendor profile. From the profile manager, retrieve the vendor profile for TIC Travel Insurance (or create the vendor profile if it is not in the database) and from the General Info Tab, click *Live Connect Providers*. From here, click *Add*, then select TIC Travel Insurance booking engine from the drop-down list. The vendor code is left blank. Click *OK*.

TIC Travel Insurance Features

TIC Travel Insurance supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- __ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

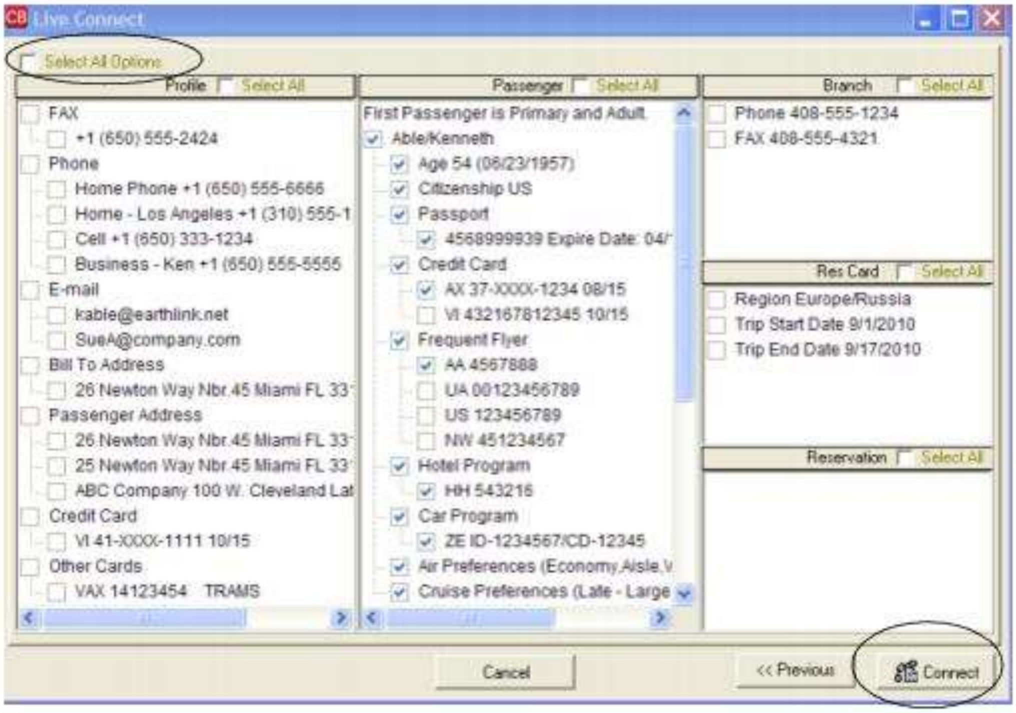
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New TIC Travel Insurance Reservation

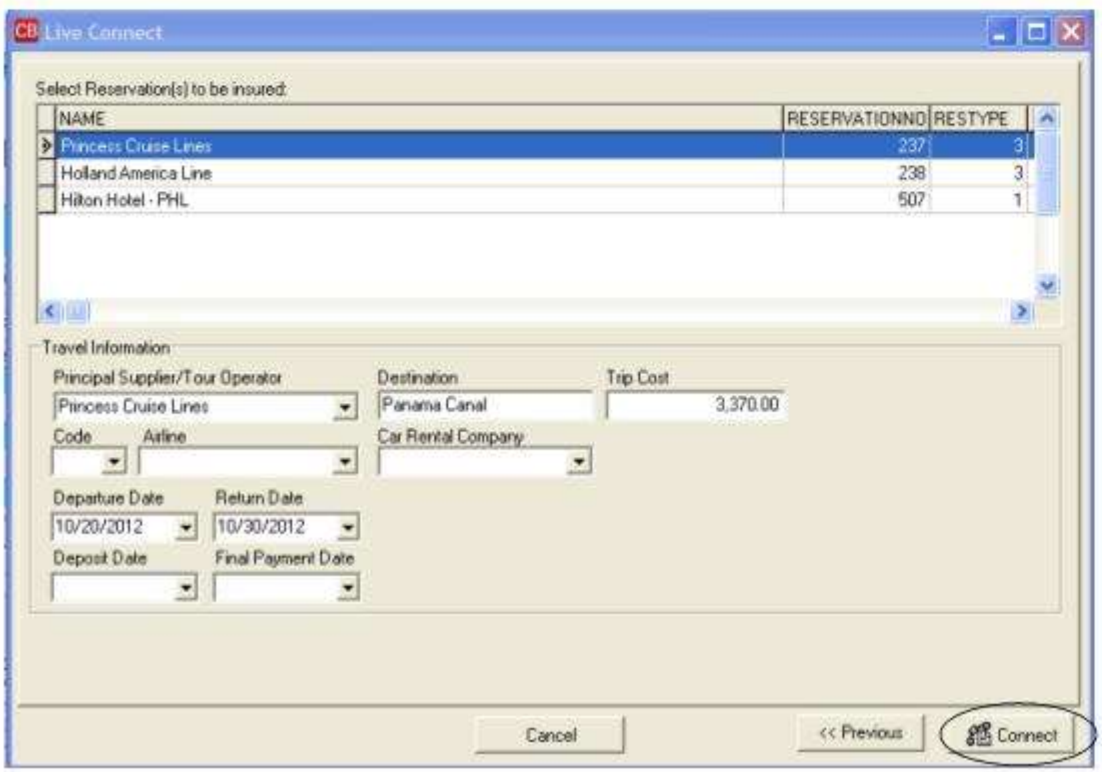
Step 1) Complete the initial Res Card information, Click the *Reservation* Tab and *Add*. Fill in the *Vendor* and *Travel Category* fields and then click *Live Connect*.

Step 2) Select TIC Travel Insurance from the drop-down menu by *Connect To* (if not already defaulted). Click *Create New Reservations*.

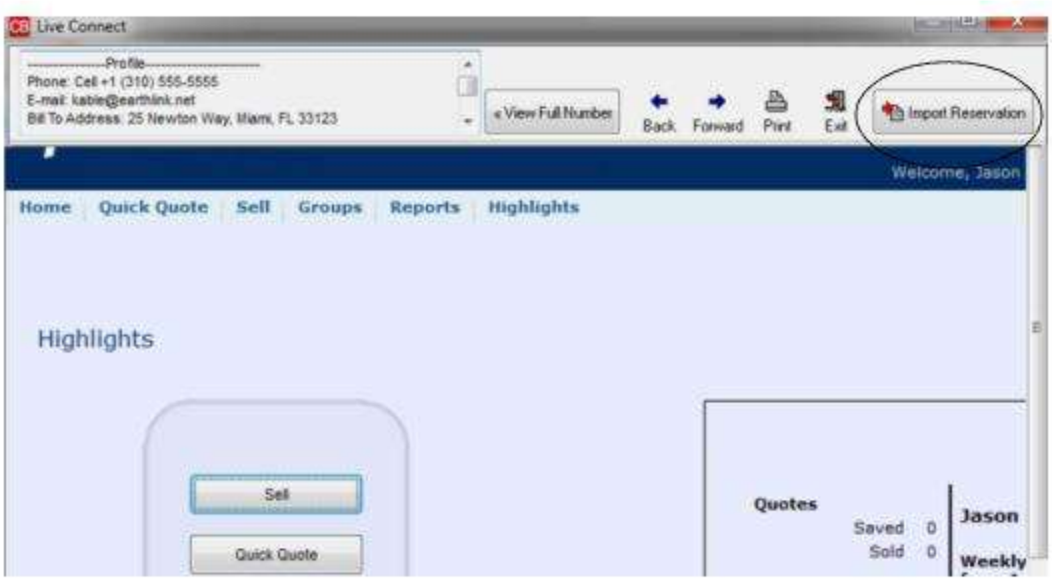
Step 3) Select any customer information for use to book the TIC Travel Insurance reservation. This data is automatically passed to TIC Insurance and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure by using the CTRL key in combination with mouse clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the TIC Insurance website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



Need help? QuickTIC questions can be answered by calling Agency Services at 1-800-465-4279.

Import Existing TIC Travel Insurance Reservation Made Outside of *ClientBase*

First, create a new reservation in *ClientBase* and after clicking entering vendor information, click *Live Connect* and *Import an Existing Reservation.* Enter a confirmation number or leave blank, but when in booking site, locate the retrieve reservation area. Once the reservation details are showing, exit the booking. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site and brings up the reservation. Edit or cancel the reservation using instructions supplied by the booking engine, and exit the booking.

Step 4) When the reservation changes are confirmed, click *Import Reservation.*

All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Trafalgar

If you are not currently registered to book Trafalgar, register to make bookings as a new agency set-up, by visiting http://www.tltc.com/agencyupdates or call Trafalgar at 1-800-854-0103. Upon completion of the registration you will receive a User ID and Password and can take the following steps to setup *ClientBase*.

Set Up Trafalgar Live Connect

Upon receiving User ID and Password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Since we are releasing Trafalgar between *ClientBase* releases, set it up as a Live Connect Provider by going to **Utilities|Live Connect Providers**, and clicking *Add*.

Provider Name: Type Trafalgar.

URL: Type **https://book.trafalgartours.com/BookingWizard/*Trams*LiveConnect.aspx?sc=TTUSAS**

Travel Category: Select *Tour* from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Live Connect Login.** Click *Add* and enter the following information:

Live Connect Provider: Select Trafalgar from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted Trafalgar. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Set Up Individual Agent Login Information: To set up Live Connect for **each** user login, click the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Trafalgar by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Live Connect Provider: Select Trafalgar from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted Trafalgar. (The Agency Number and Agency Code is not applicable.) Click *OK to save.*

Step 3) Retrieve the Trafalgar vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the *Live Connect Providers* button. Click *Add,* and select *Trafalgar* booking engine from the drop-down list. The Vendor Code is left blank. In the *Travel Category* profile field, select *Tour* from the drop-down menu.

Live Connect Features Supported by Trafalgar

Trafalgar supports the following Live Connect Features if checked :

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

_ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- _ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- _ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

_ **RETRIEVE RESERVATION** (Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.)

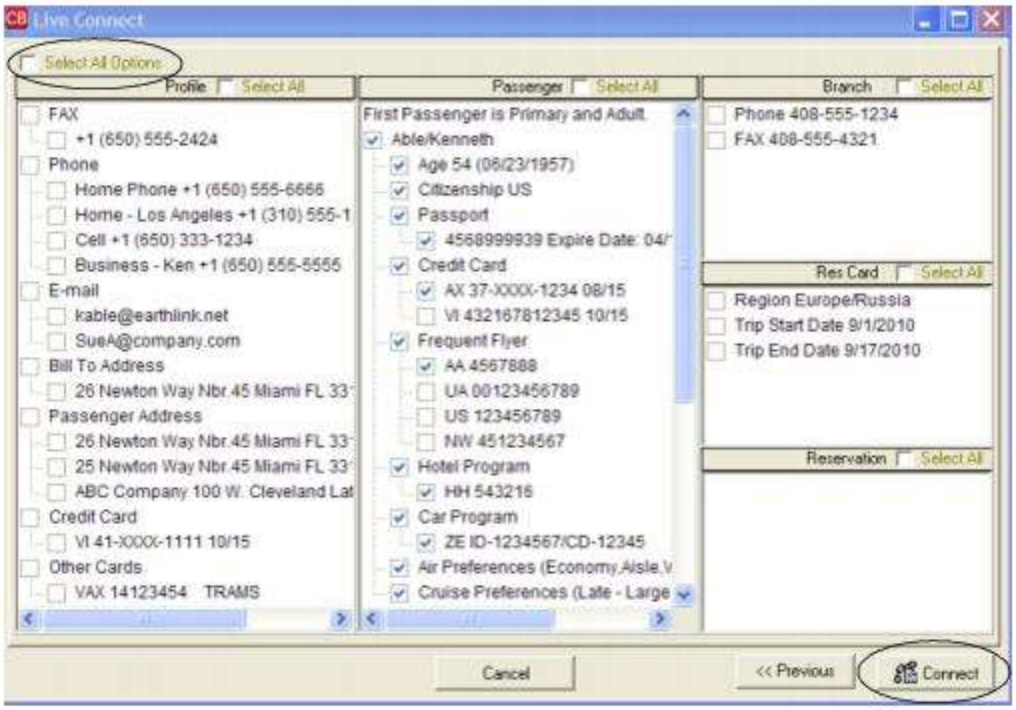
Create New Reservation in Live Connect

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

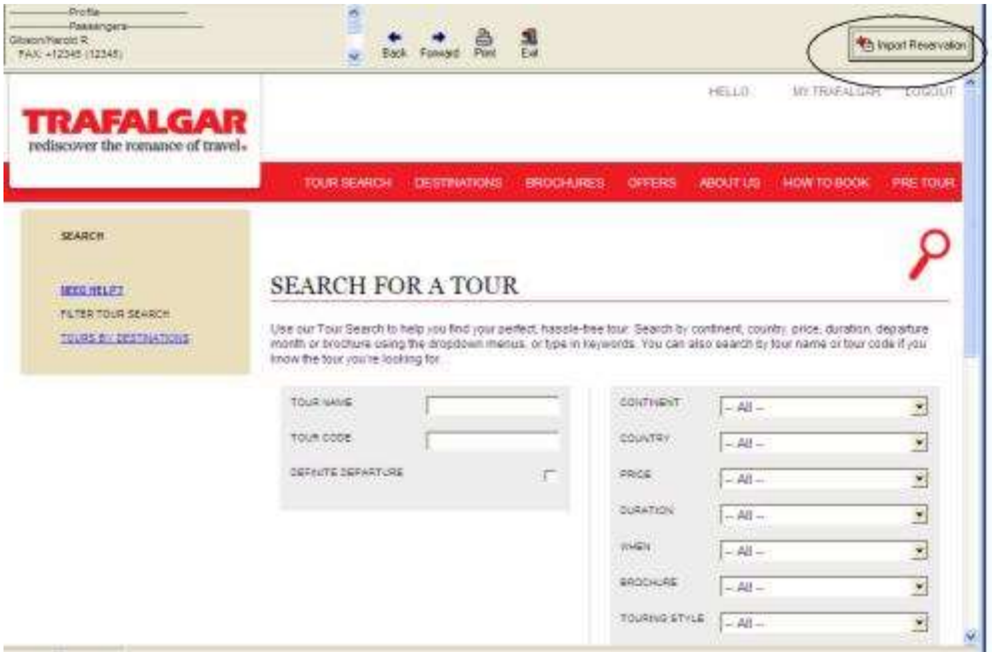
Step 2) Use the *Add Reservation* button to start a new reservation. Fill in the *Vendor, Travel Category* and click *Live Connect.*

Step 3) Select the Trafalgar from the drop-down menu by *Connect To* (if not already defaulted), and then click *Create New Reservations*.

Step 4) Select any customer information to use to book the Trafalgar reservation. Click *Connect*.



Step 5) Although still in *ClientBase*, you are now on-line at the Trafalgar booking site. Complete the reservations using instructions supplied by Trafalgar upon registration. When the reservation is confirmed, it automatically imports into the *ClientBase* reservation. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.



If you need help using the Trafalgar booking site, call Trafalgar at 1-800-854-0103.

Transat Travel Insurance

All agencies wishing to use Transat Travel Insurance Live Connect should contact their insurance Client Manager:

Quebec: Louise Dufort

Phone: 514-913-7503

E-mail: louise.dufort@ps-travelinsurance.com

Rest of Canada: Andrei Losinski

Phone: 905-856-6574 x359

E-mail: andrei.losinski@ps-travelinsurance.com

Set Up Transat Travel Insurance

Upon receiving a User ID and Account Number for your agency, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Make sure you have a correct URL for your agency. To do so, go to **Utilities|Live Connect Providers,** and scroll down to see if Transat Travel Insurance is one of the providers. If not click *Add.*

Provider Name: Transat Travel Insurance

Status: *Active.*

URL: https://www.igoinsured.com/travelweb/login.aspx?twa=LIVECON

Travel Category: Insurance.

Import XML from: HTML Source.

Include Authentication, etc.: Not applicable.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select Transat Travel Insurance from the drop-down list.*

User Name, Password and Agency Code Enter the necessary fields based upon the login information provided to you when you contacted provider (the Agency # is not applicable).

Set Up Individual Agent Login Information: Users can setup their own logins by going to **Utilities|MyLogin|Live Connect**. The database administrator can also do this for **each** user login by clicking on the Live Connect tab in the User Settings after logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Transat Travel Insurance by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Complete the following fields (the other fields are not applicable):

Live Connect Provider: Select Transat Travel Insurance from the drop-down list.*

User Name, Password and Agency Code Enter the necessary fields based upon the login information provided to you when you contacted provider (the Agency # is not applicable).

Step 2) From the profile manager, retrieve the Transat Travel Insurance vendor profile (or create if it is not in database). From the General Info tab click *Live Connect Providers*. From here, click *Add*, then select Transat Travel Insurance from the drop-down list. The vendor code is left blank. Click *OK*.

Step 3) Setup insurance prompting by going to **Global Defaults|Res Card Defaults|Insurance Prompting**. (See chapter, *Setting Up ClientBase for Your Agency.)*

Transat Travel Insurance Features

Transat Travel Insurance supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- __ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

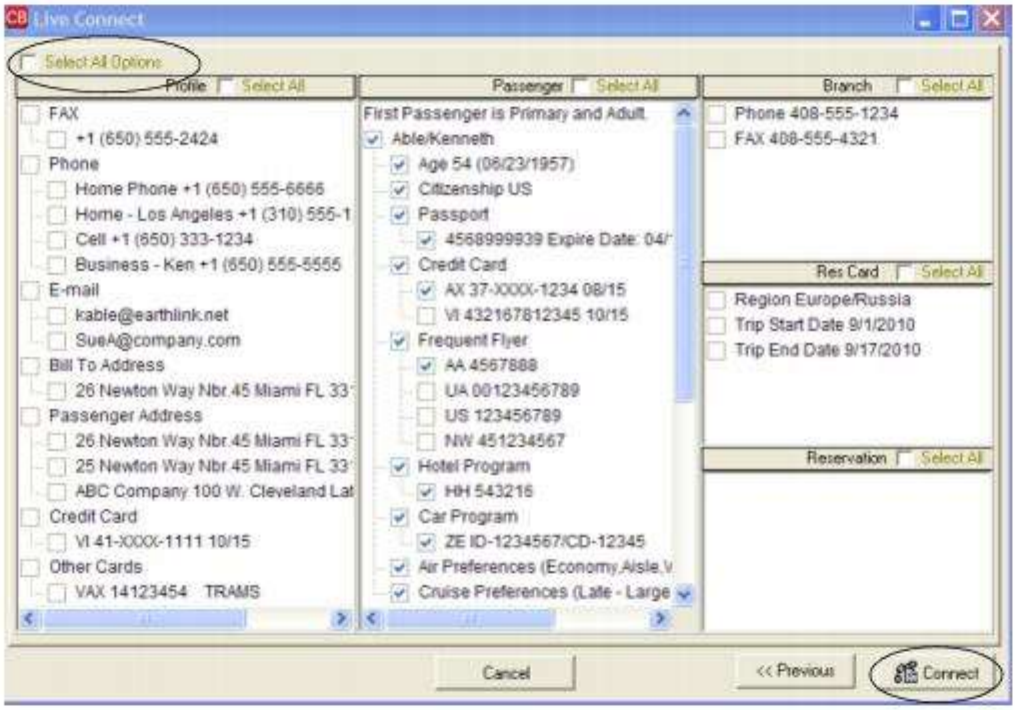
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Transat Travel Insurance Reservation

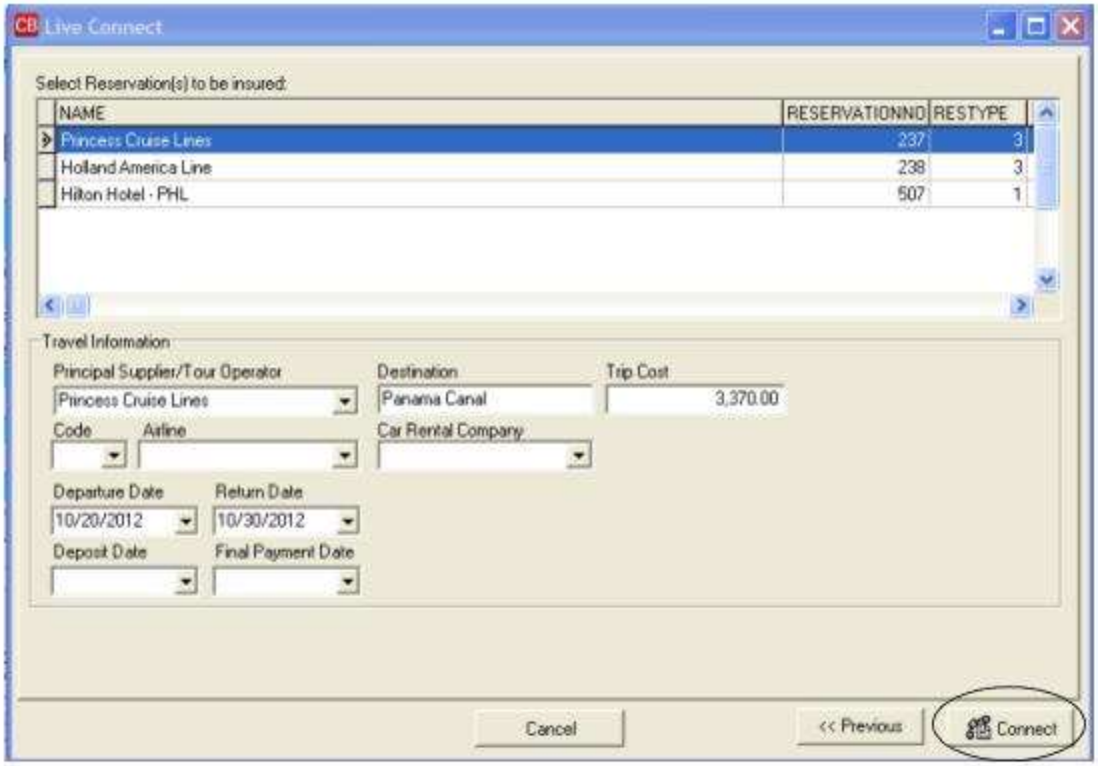
Step 1) After filling in the Res Card information, click the *Reservation* Tab and *Add*. Select Transat Travel Insurance as the vendor and fill in the *Travel Category,* click *Live Connect.*

Step 2) Select Transat Travel Insurance from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the reservation. This data is automatically passed to Transat Travel Insurance and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the Transat Travel Insurance website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation* on top right of the screen

All reservation data booked on-line is now located in the reservation fields in *ClientBase*. Need help booking in Transat Travel Insurance? Transat Help Desk French: 1-800-752-1143 and Transat Help Desk English: 1-800-263-2356.

Travel Bound - Canada

If you are not currently registered to book with Travel Bound - Canada on-line, the Travel Bound registration site and form is here: http://booktravelbound.com/TravelAgentSite/newAgency.html

Upon registering as a new user, you are provided with login information.

Set Up Travel Bound - Canada

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Travel Bound Canada if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Travel Bound Canada.

URL: Enter **https://rbs.booktravelbound.com/*Trams*US**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select Travel Bound Canada from the drop-down list.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Travel Bound Canada. User name is e-mail address and your selected password.

Account Number: Enter Account Number (assigned Agent ID).

Agency Code: Agent's License Number (Example License/IATA/PCC Code).

Set Up Individual Agent Login Information: Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Travel Bound Canada from the drop-down list.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Travel Bound Canada. User name is e-mail address and your selected password.

Account Number: Enter Account Number (assigned Agent ID).

Agency Code: Agent's License Number (Example License/IATA/PCC Code).

Step 3) Create a vendor profile in *ClientBase* for Travel Bound Canada if one does not exist. From the profile manager, retrieve the Travel Bound vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Travel Bound from the drop-down list. The vendor code is left blank. Click *OK*.

Travel Bound Canada Features

Travel Bound Canada supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

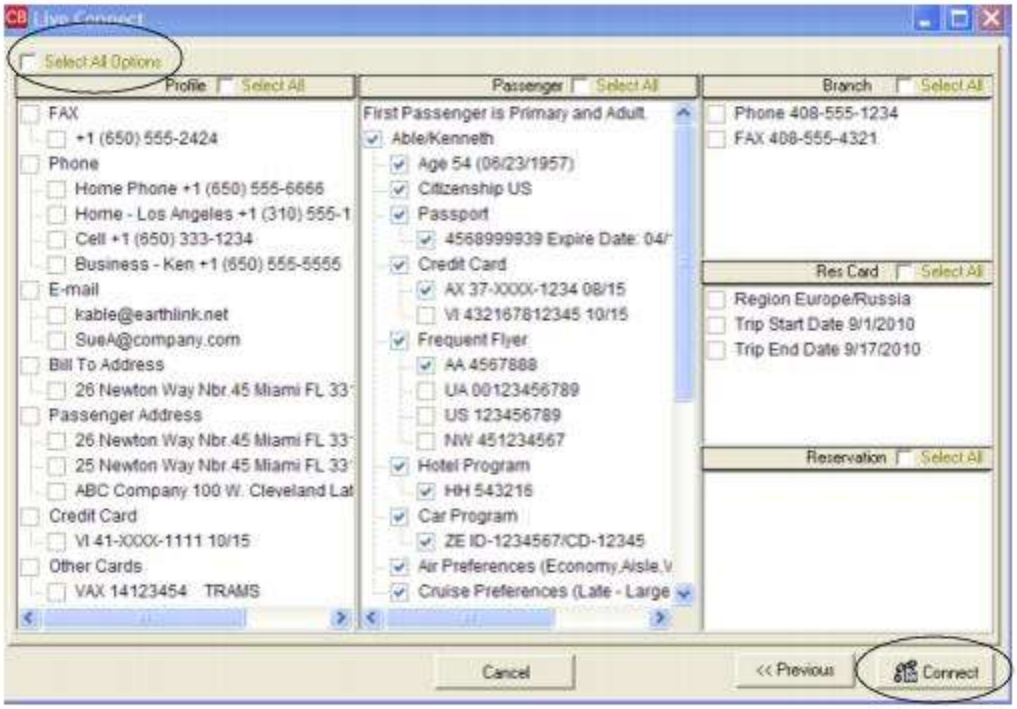
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Travel Bound Canada Reservation

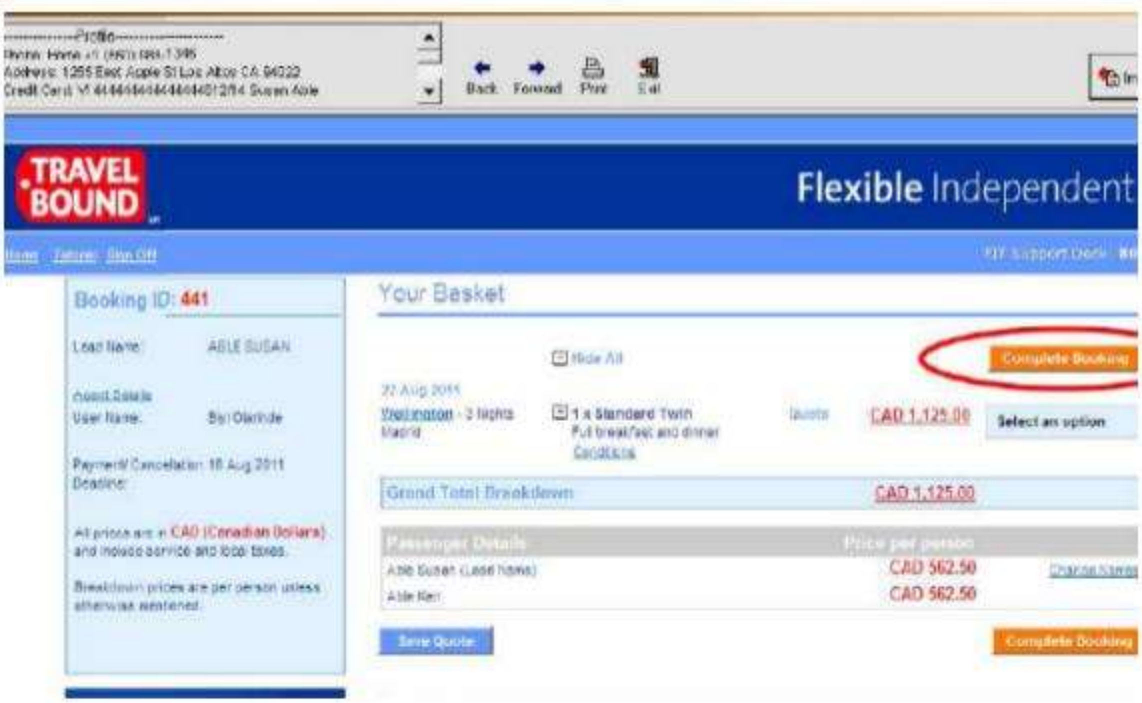
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Travel Category and select Travel Bound Canada as the vendor, fill in the Travel Category, and then click *Live Connect*.

Step 2) Select Travel Bound Canada from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

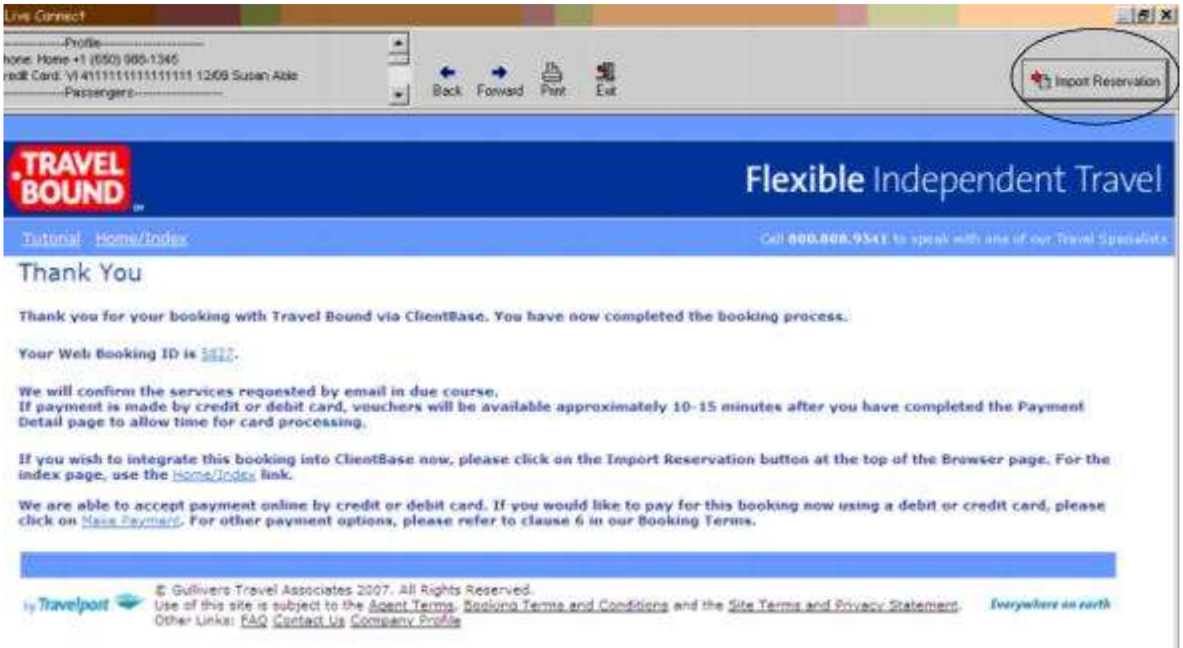
Step 3) Select any customer information to use to book the reservation. This data is automatically passed to Travel Bound Canada and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. Create the booking and when done, exit the booking.



When the reservation is confirmed on the *Thank You Page*, click *Import Reservation.*

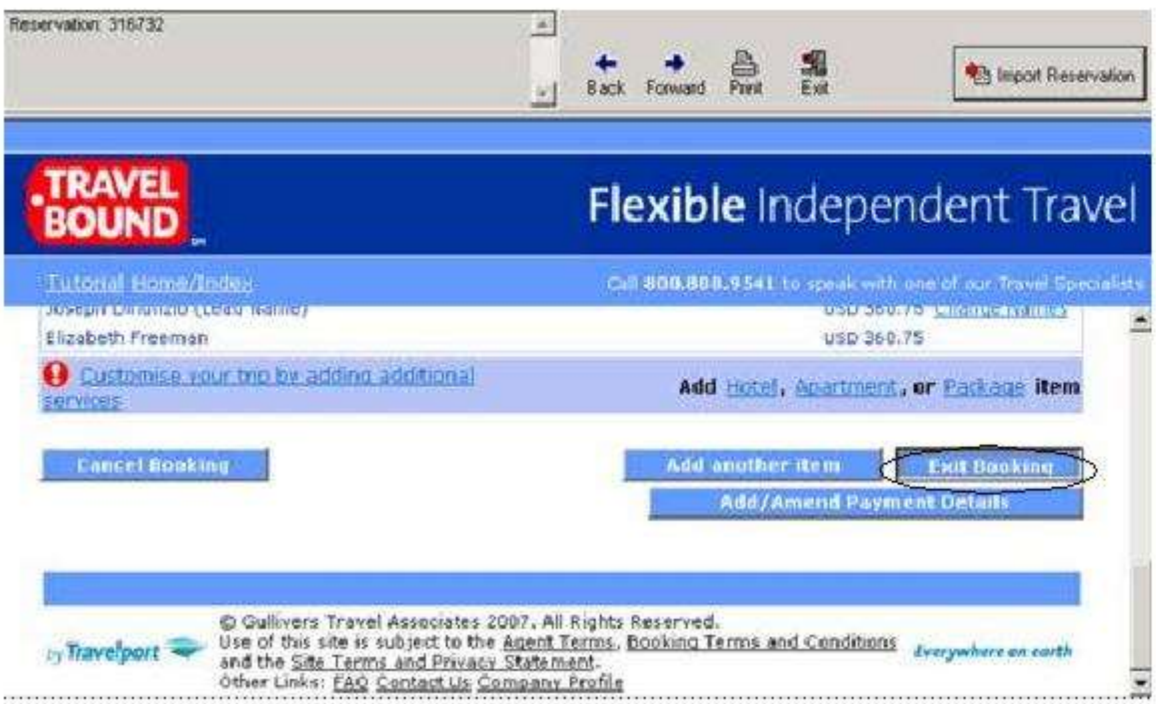


All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

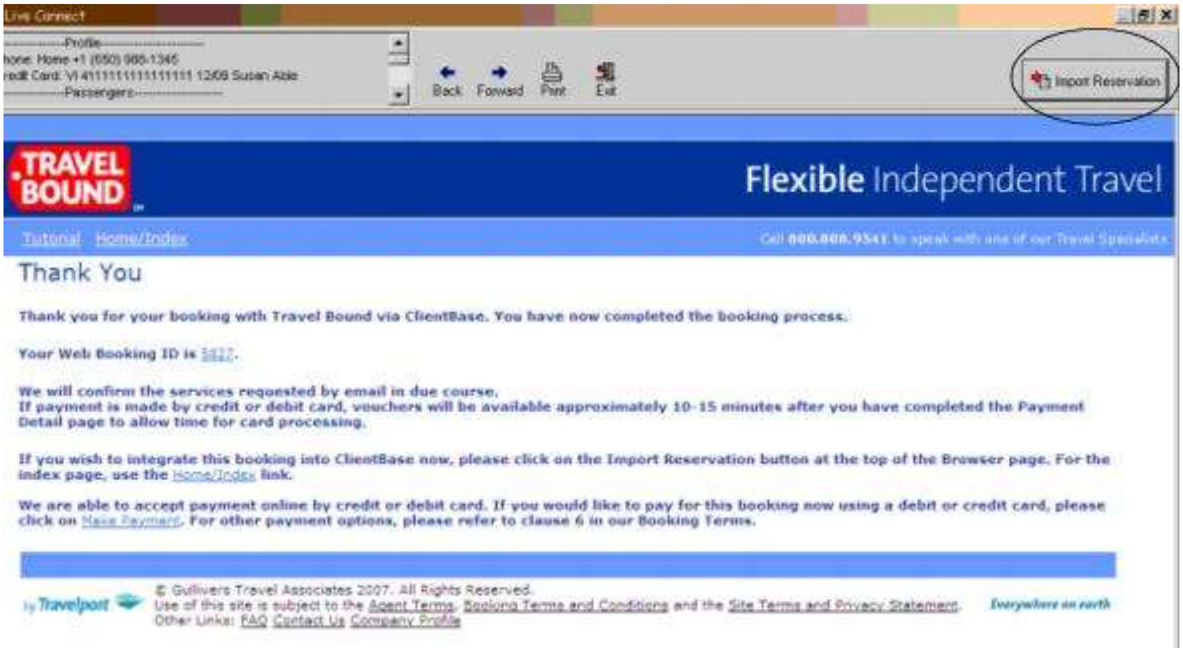
Need help on Travel Bound site? Agents should contact the Travel Bound Operation Support Team by calling their designated support number or send an e-mail to **fit.nyc@gta-travel.com.**

Import Existing Travel Bound Reservation Made Outside of *ClientBase*

First, create a new reservation in *ClientBase* and after clicking entering vendor information, click *Live Connect* and *Import an Existing Reservation*. Enter a confirmation number or leave blank, but when in booking site, locate the retrieve reservation area. Once the reservation details are showing, exit the booking.



When the reservation is confirmed on the *Thank You Page*, click *Import Reservation.*



All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

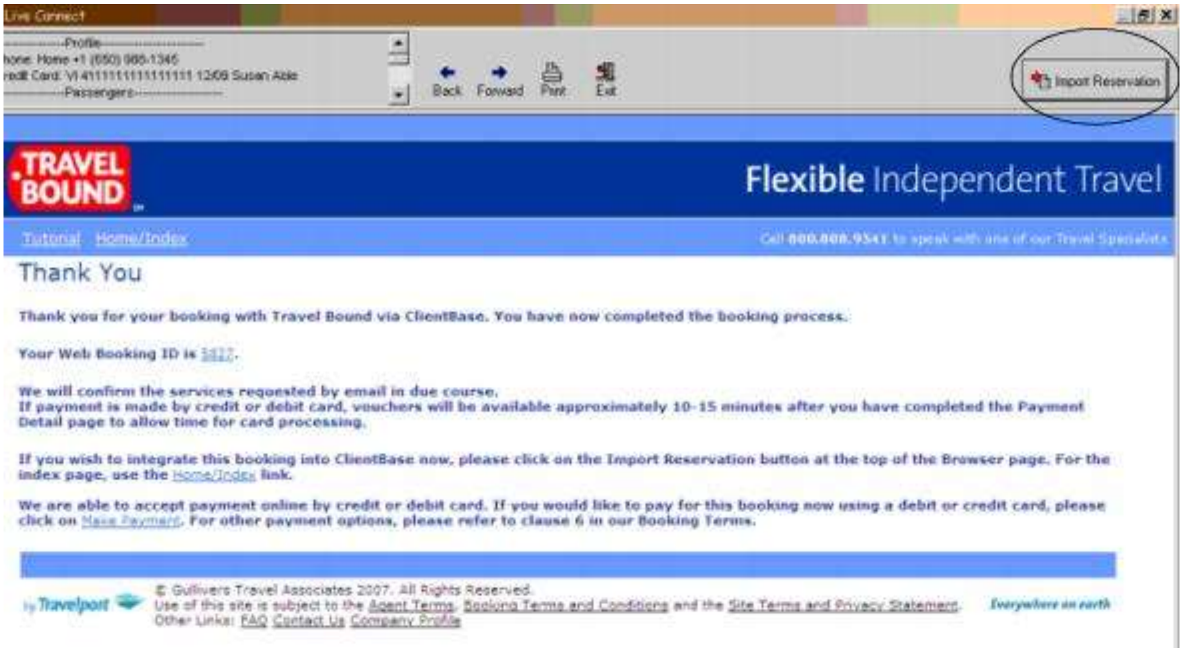
To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site and brings up the reservation. Edit or cancel the reservation using instructions supplied by the booking engine, and exit the booking.

Step 4) When the reservation is confirmed on the *Thank You Page*, click *Import Reservation.*



All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Travel Bound

If you are not currently registered to book with Travel Bound on-line, the Travel Bound registration site and form is here:

http://booktravelbound.com/TravelAgentSite/newAgency.html

Upon registering as a new user, you are provided with login information.

Set Up Travel Bound

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Travel Bound if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Travel Bound.

URL: Enter **https://rbs.booktravelbound.com/*Trams*US**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select Travel Bound from the drop-down list.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Travel Bound. User name is e-mail address and your selected password.

Account Number: Enter Account Number (assigned Agent ID).

Agency Code: Agent's License Number (Example License/IATA/PCC Code).

<u>Set Up Individual Agent Login Information:</u> Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Travel Bound from the drop-down list.

User Name/Password: Enter the necessary fields based upon the login information provided to you when you contacted Travel Bound. User name is e-mail address and your selected password.

Account Number: Enter Account Number (assigned Agent ID).

Agency Code: Agent's License Number (Example License/IATA/PCC Code).

Step 3) Create a vendor profile in *ClientBase* for Travel Bound if one does not exist. From the profile manager, retrieve the Travel Bound vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Travel Bound from the drop-down list. The vendor code is left blank. Click *OK*.

Travel Bound Features

Travel Bound supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

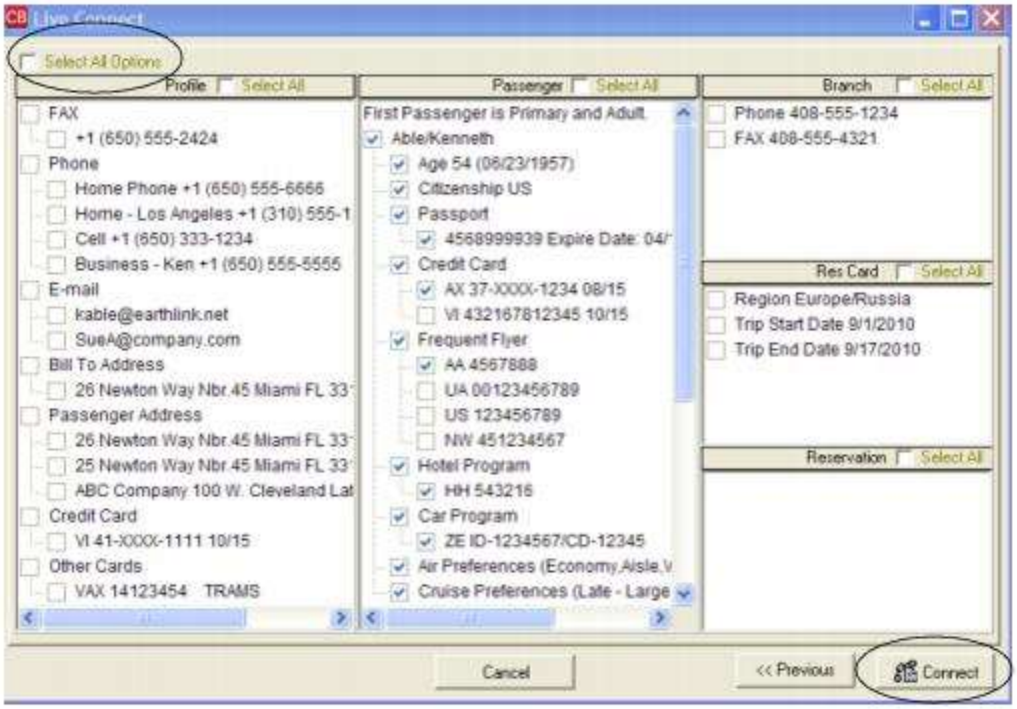
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Travel Bound Reservation

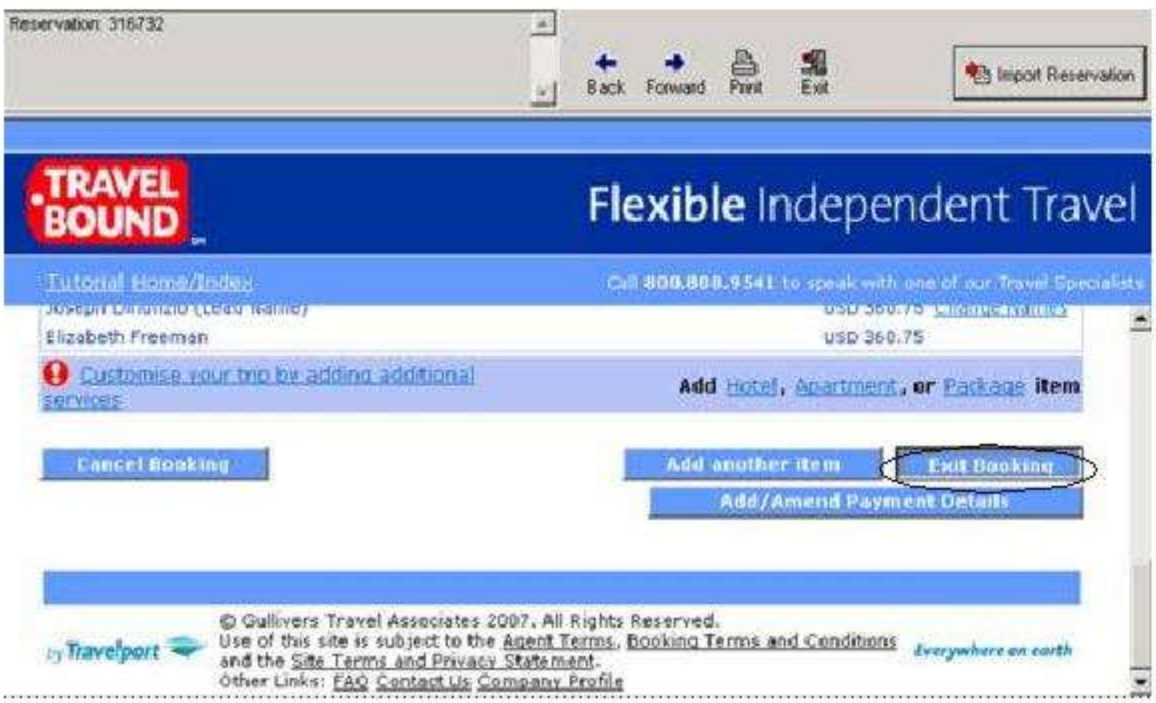
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Travel Category and select Travel Bound as the vendor, fill in the Travel Category, and then click *Live Connect*.

Step 2) Select Travel Bound from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

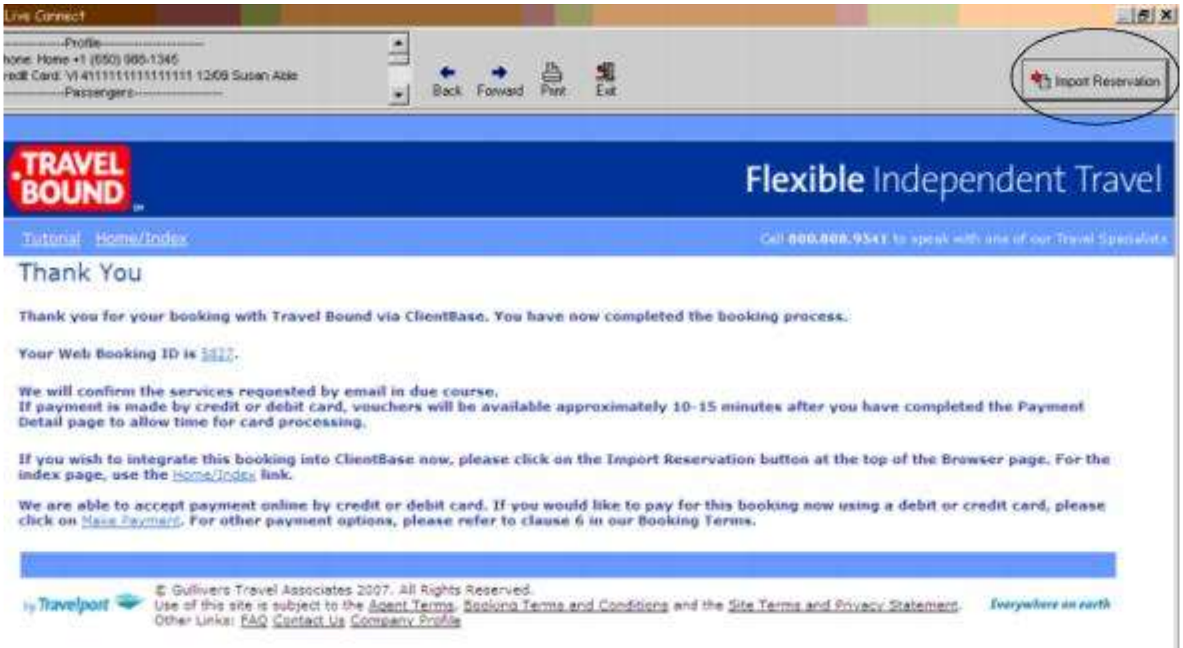
Step 3) Select any customer information to use to book the reservation. This data is automatically passed to Travel Bound and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. Create the booking and when done, exit the booking.



When the reservation is confirmed on the *Thank You Page*, click *Import Reservation.*

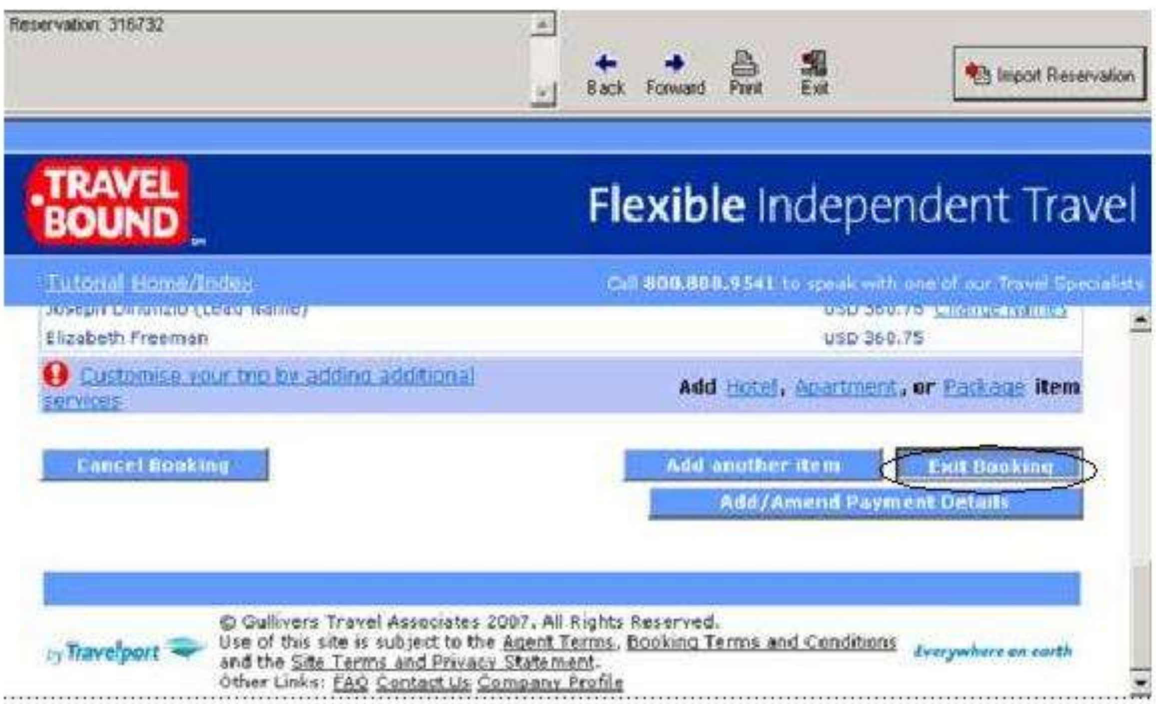


All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

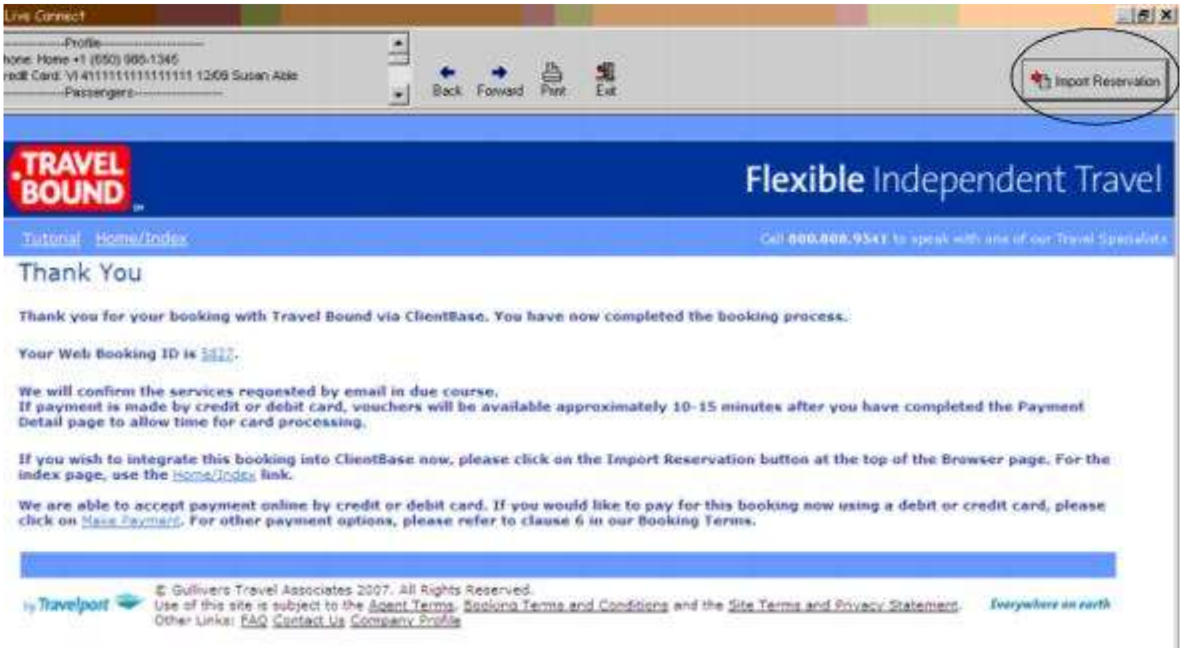
Need help on Travel Bound site? Agents should contact the Travel Bound Operation Support Team by calling their designated support number or send an e-mail to **fit.nyc@gta-travel.com.**

Import Existing Travel Bound Reservation Made Outside of *ClientBase*

First, create a new reservation in *ClientBase* and after clicking entering vendor information, click *Live Connect* and *Import an Existing Reservation*. Enter a confirmation number or leave blank, but when in booking site, locate the retrieve reservation area. Once the reservation details are showing, exit the booking.



When the reservation is confirmed on the *Thank You Page*, click *Import Reservation.*



All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

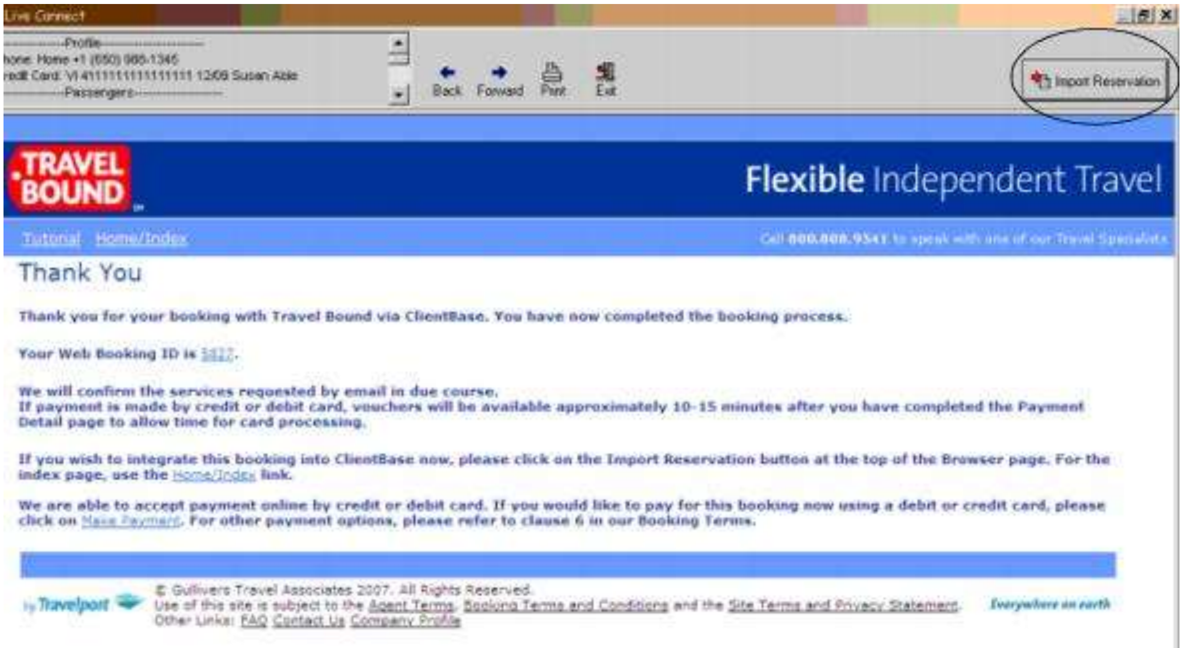
To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site and brings up the reservation. Edit or cancel the reservation using instructions supplied by the booking engine, and exit the booking.

Step 4) When the reservation is confirmed on the *Thank You Page*, click *Import Reservation.*



All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Travel Guard ezTips

TravelGuard's ezTips can now be used with *ClientBase*. The installation and support is all handled by TravelGuard. Contact TravelGuard (ezTips Support) at 866-729-5215 for their assistance with the installation and other questions that you may have about ezTips use.

Travel Guard

If already licensed to sell Travel Guard your account number is the IATA, CLIA, or Travel Guard account number. If you are not currently licensed to sell Travel Guard, contact Travel Guard directly at 800-826-1300 or go to http://www.travelguard.com/info/salesform.asp and complete the form.

Set Up Travel Guard

Upon receiving an account number, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for Travel Guard exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

> **Provider Name:** Enter Travel Guard.
>
> **URL: http://www.travelguard.com/cgi-bin-/directSubmit.asp?**
>
> **Travel Category:** N/A
>
> **Import XML from:** N/A

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

> **Live Connect Provider:** Select the appropriate Travel Guard Live Connect provider to connect to its booking engine.

Account Number: Enter the account number, and click *OK*.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select the appropriate Travel Guard Live Connect provider to connect to its booking engine.

Account Number: Enter the account number, and click *OK*.

Step 3) Create a vendor profile in *ClientBase* for Travel Guard. From the profile manager, retrieve the Travel Guard vendor profile (or create if it is not in your database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select your desired booking engine (Travel Guard) from the drop-down list. The vendor code is left blank. Click *OK*.

Travel Guard Features

Travel Guard supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

_ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

_ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

_ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

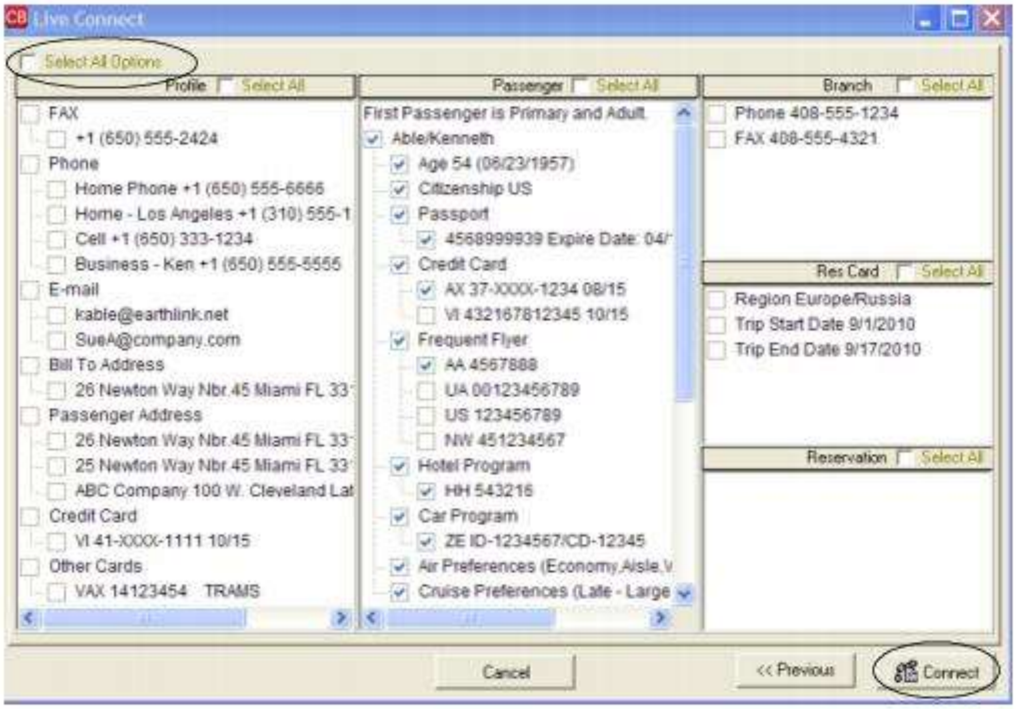
_ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Travel Guard Reservation

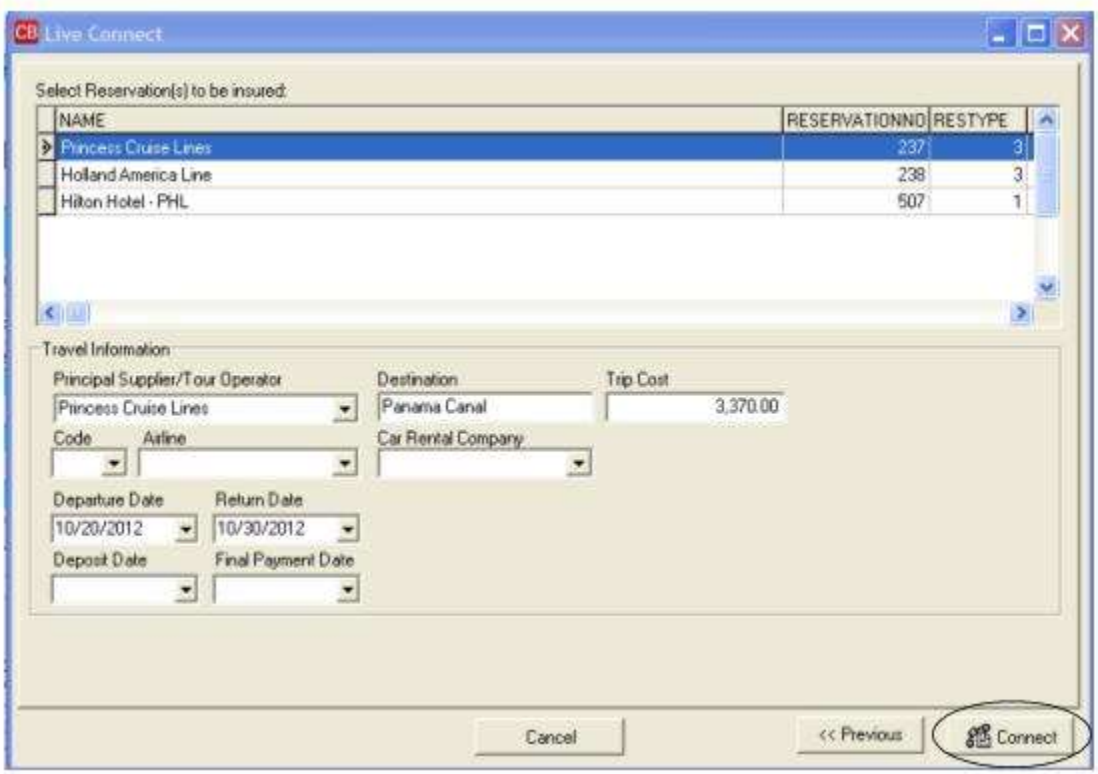
Step 1) Fill in the Res Card information needed and click the *Reservation* Tab and *Add*. Select Travel Guard as the vendor, fill in the Travel Category and click *Live Connect.*

Step 2) Select Travel Guard from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the Travel Guard reservation. This data is automatically passed to Travel Guard and saves time during the booking process, as less fields need to be completed manually. Click *Connect* to continue.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation you want to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the Travel Guard website confirming the insurance booking. Click *Connect.*



Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.

All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Travel Impressions

If you are not currently registered with Travel Impressions, register with them by logging on to www.travelimpressions.com and log-in to the agent section on the website. Locate the *New User Registration* link. Upon creating a User Name and Password for each agent in your office, set up *ClientBase* for Live Connect.

Set Up Travel Impressions

Step 1) Create a new or check that a Live Connect Provider for Travel Impressions exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter Travel Impressions.

URL: https://quest.travimp.com/phase1/agents.html

Travel Category: Select Tour from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) User Login Data does not populate in Live Connect so no set up is required, but create a vendor profile in *ClientBase* if one does not exist. From the profile manager, retrieve the *Travel Impressions* vendor profile (or create if it is not in database). From the General Info tab, click Live Connect Providers. From here, click *Add*, and select *Travel Impressions* from the drop-down list. The vendor code is left blank. Click *OK*.

Travel Impressions Features

Travel Impressions supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

__ Populates booking engine with User Login data from *ClientBase*.

__ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

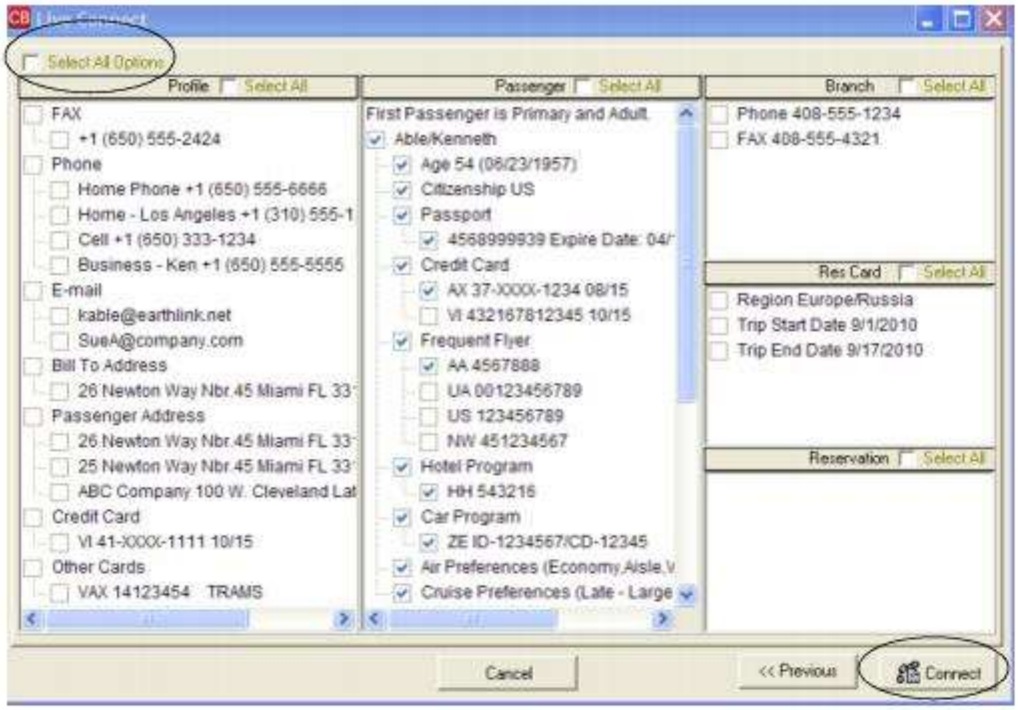
✓ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Travel Impressions Reservation

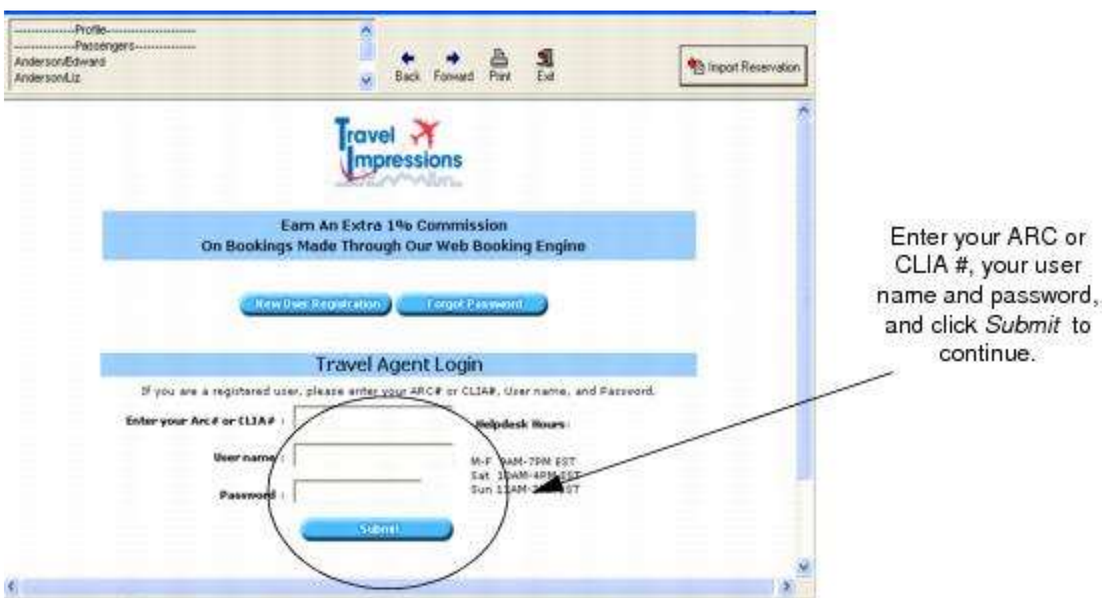
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter *Travel Impressions* as the vendor, fill in the Travel Category, and then click *Live Connect*.

Step 2) Select Travel Impressions from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the Travel Impressions reservation. This data is **NOT** passed to Travel Impressions, but you are able to view it at the top of your booking screen and can highlight it, copy, and paste it into the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. A page appears which verifies your ARC or CLIA #, User Name, login, and password the first time you sign in (and is pre-populated with this data thereafter).



Create the booking by clicking *Make a Reservation* with all traveler information (none is passed to site through *ClientBase*, but you can highlight, copy and paste information at top of screen into booking fields) and when the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen. All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in Travel Impressions website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase*.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

Travel Insured

To use Live Connect to purchase insurance with Travel Insured, you must be registered to sell Travel Insured insurance. If not currently licensed to sell Travel Insured, or have not been setup to book on-line, contact Travel Insured directly by e-mailing info@travelinsured.com .

Set Up Travel Insured

Upon receiving login information from Travel Insured, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for Travel Insured exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter Travel Insured.

URL: https://www.travelinsured.com/*trams*login.aspx

Travel Category: Select Insurance from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select Travel Insured from the drop-down list.*

User Login: Enter the Login ID supplied upon registration.

User Password: Enter the password supplied upon registration.

Account Number: Leave blank.

Agency Code: Leave blank. Click *OK* to save.

Note: *You are also given a Username and Agency number. These are not used here.*

<u>Set Up Individual Agent Login Information:</u> Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select Travel Insured from the drop-down list.*

User Login: Enter the Login ID supplied upon registration.

User Password: Enter the password supplied upon registration.

Account Number: Leave blank.

Agency Code: Leave blank. Click *OK* to save.

Note: *You are also given a Username and Agency number. These are not used here.*

Step 3) From the profile manager, retrieve the Travel Insured vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Travel Insured from the drop-down list. The vendor code is left blank. Click *OK*.

Travel Insured Features

Travel Insured supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

_ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

_ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

_ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

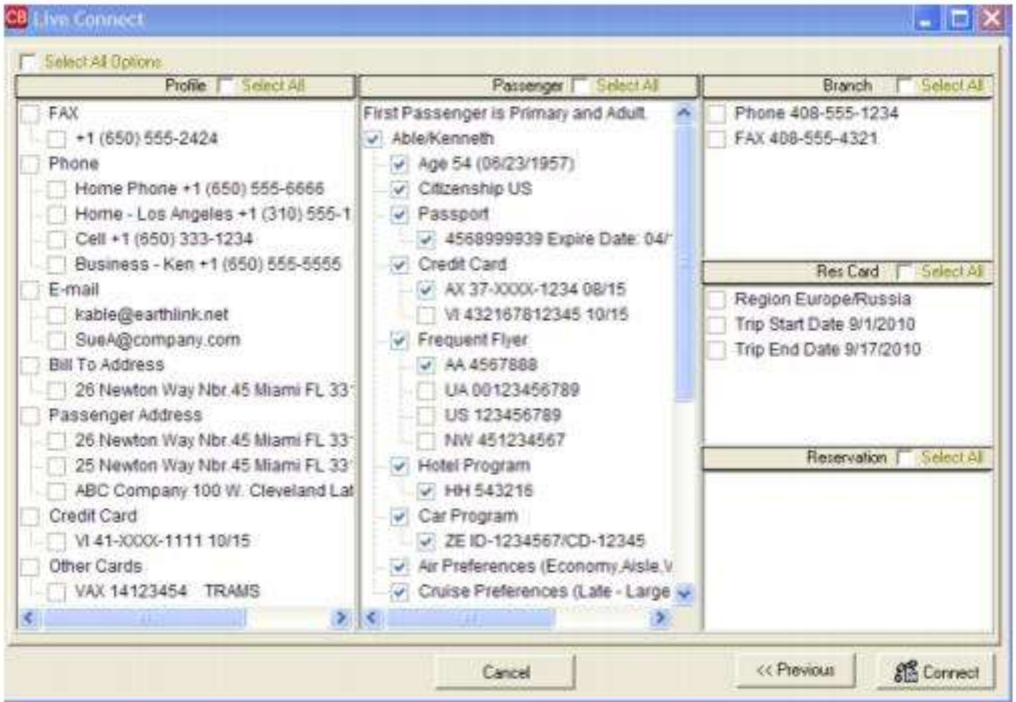
_ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Travel Insured Reservation

Step 1) Click *Reservation* tab and *Add* in the Res Card. Select Travel Insured as the vendor and click *Live Connect.*

Step 2) Select Travel Insured from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the Travel Insured reservation. This data is automatically passed to Travel Insured and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the Travel Insured website confirming the insurance booking. Click *Connect.*

Step 5) Although in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*. All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Travel2/Islands In The Sun/Qantas Vacations

It is not necessary to register to use Live Connect for brands Travel2, Islands In The Sun and Qantas Vacations. For questions - please contact us at (888) 410-5770.

Set Up Travel2/Islands In The Sun/Qantas Vacations

Take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a Live Connect Provider for Travel2/IslandInTheSun/QantasV if none exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (It's a good idea to check if the URL is correct.)

Provider Name: Enter Travel2/IslandInTheSun/QantasV.

URL: Enter **https://csgconn.stellatravelusa.com/InfoRequest**

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Create vendor profiles in *ClientBase* for Travel2 (United States or Canada); Island In The Sun (United States); and Qantas Vacations (United States or Canada) if they do not exist.

From the profile manager, retrieve the Travel2, Islands In The Sun and Qantas Vacations vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Travel2/IslandInTheSun/QantasV from the drop-down list. The vendor codes are as follows:

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
ATT2	Travel2 (United States)	Travel2/IslandInTheSun/QantasV
T2CA	Travel2 (Canada)	Travel2/IslandInTheSun/QantasV
ATIS	Islands In The Sun	Travel2/IslandInTheSun/QantasV
QAVUS	Qantas Vacations (United States)	Travel2/IslandInTheSun/QantasV
QAVCA	Qantas Vacations (Canada)	Travel2/IslandInTheSun/QantasV

Click *OK* to save.

Travel2/Islands In The Sun/Qantas Vacations Features

Travel2/Islands In The Sun/Qantas Vacations supports the following Live Connect Features if checked:

__ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- __ Populates booking engine with User Login data from *ClientBase*.
- __ Populates booking engine with profile data from *ClientBase*.
- __ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

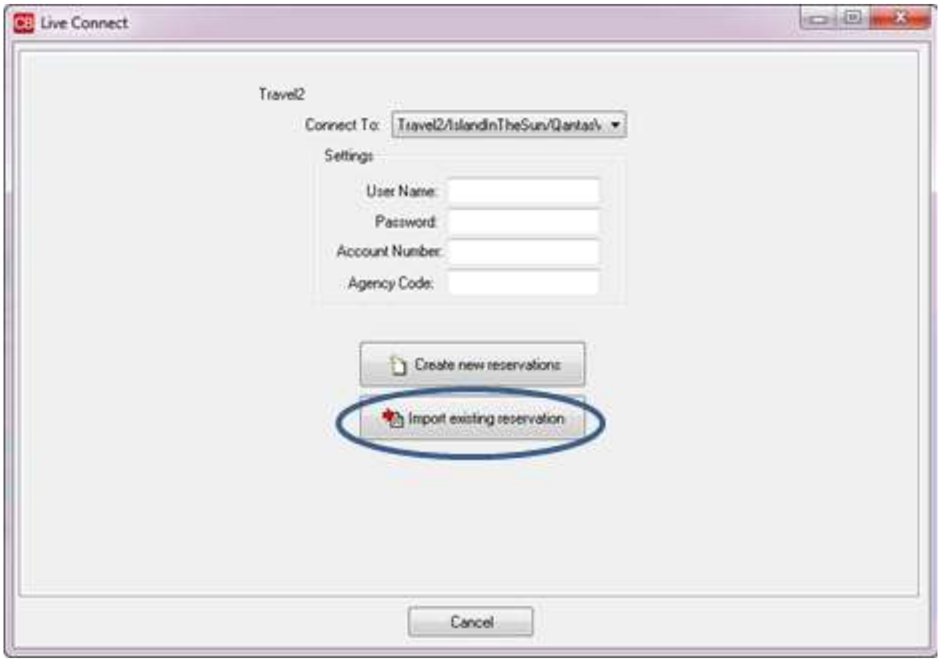
- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- __ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

__ **RETRIEVE RESERVATION** - Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Import Previously Made Travel2, Islands In The Sun, or Qantas Vacations Reservation Details

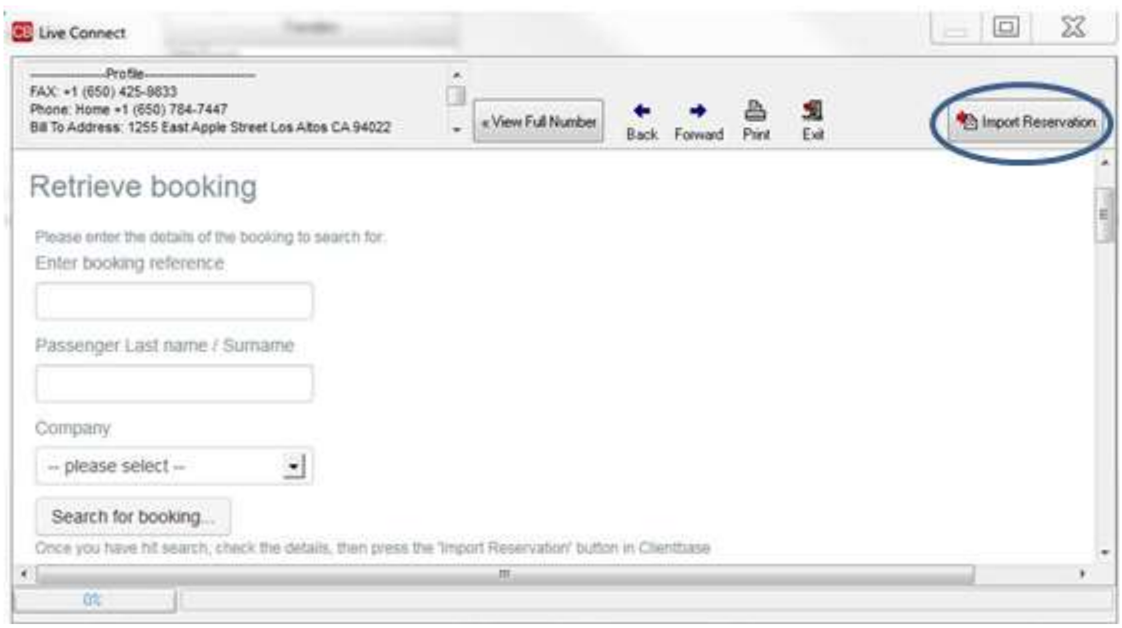
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name*, and add a reservation. Select either Travel2, Islands In The Sun, or Qantas Vacations as the vendor and enter the *Travel Category* and then click *Live Connect*.

Step 2) Select Travel2/IslandInTheSun/QantasV from the drop-down menu by Connect To (if not defaulted), and then click *Import existing reservation*. (No login information is necessary.)



Step 3) Enter the confirmation number for the reservation (i.e. 123456. No letters, i.e. AT, are needed). Then enter the client's last name you want to import into *ClientBase*. Click *OK*.

Step 4) Although still in *ClientBase*, you are now on-line at the vendor booking site. Once the reservation is displayed on your screen, click *Import Reservation* at the top of the *ClientBase* screen. All reservation data booked on-line is now located in the *ClientBase* reservation screen.



Need help? Email salessupport@travel2-us.com .

Travelex Insurance Services

If already licensed to sell Travelex Insurance Services, use the Travelex location number as the account number when using Live Connect. If not currently licensed to sell Travelex, call Travelex Sales Support at 1-800-537-8052.

Set Up Travelex Insurance Services

Once you have a Travelex location number, take the following steps to setup *ClientBase* for Live Connect:

Step 1) Create a new or check that a Live Connect Provider for Travelex Insurance Services exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

> **Provider Name:** Enter Travelex Insurance.
>
> **URL: https://www.travelexinsurance.com/EntryPoint*Trams*.aspx**
>
> **Travel Category:** Select Insurance from the drop-down.
>
> **Import XML from:** Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

<u>Set Up Global Agent Login Information:</u> To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

> **Live Connect Provider:** Select the appropriate Travelex Live Connect Provider to connect to its booking engine.
>
> **User Name:** Enter User Name.
>
> **Password:** No password is needed.
>
> **Account Number:** Enter the Travelex location number issued at the time of registration as the account number. Click *OK* to save.

Complete the following fields (the other fields are grayed out as they are not applicable):

<u>Set Up Individual Agent Login Information:</u> Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

> **Live Connect Provider:** Select the appropriate Travelex Live Connect Provider to connect to its booking engine.
>
> **User Name:** Enter User Name.
>
> **Password:** No password is needed.
>
> **Account Number:** Enter the Travelex location number issued at the time of registration as the account number. Click *OK* to save.

Complete the following fields (the other fields are grayed out as they are not applicable):

Step 3) Create a vendor profile in *ClientBase* for Travelex Insurance Services. From the Profile Manager, retrieve the Travelex vendor profile (or create one). From the General Info Tab, click *Live Connect Providers*. From here, click *Add*, then select the desired booking engine (Travelex) from the drop-down list. The vendor code is left blank. Click *OK*.

Travelex Insurance Services Features

Travelex Insurance Services supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Populates booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

_ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

_ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

_ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

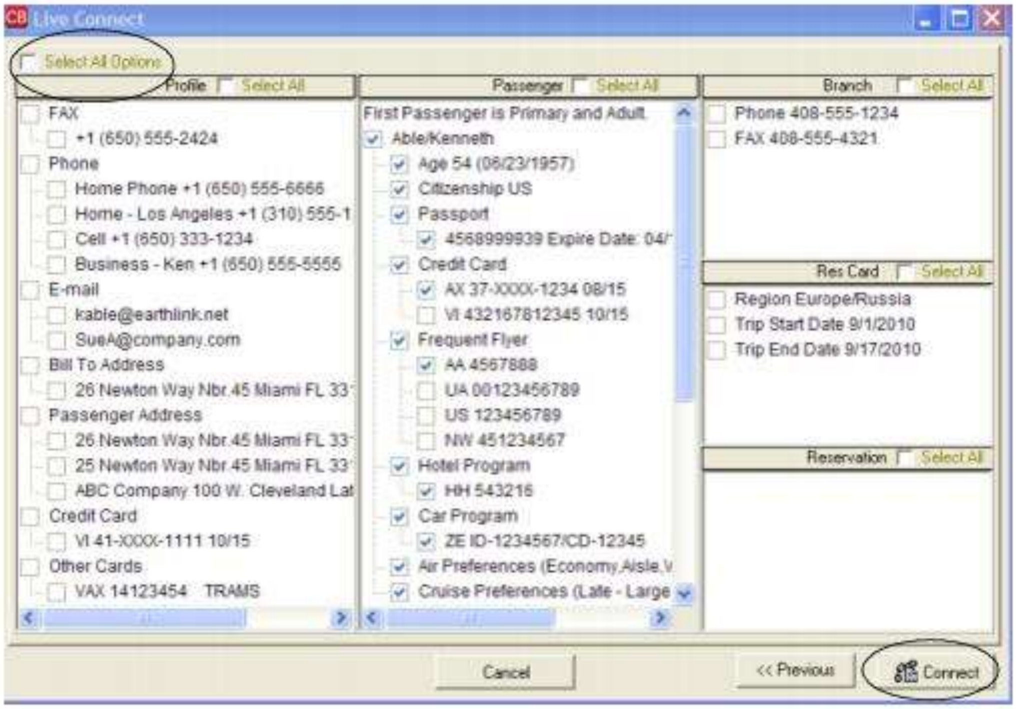
_ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Travelex Insurance Services Reservation

Step 1) Enter the Res Card information needed and click the *Reservation* Tab and *Add* in the Res Card. Fill in the *Travel Category* and *Vendor* fields and then click *Live Connect*.

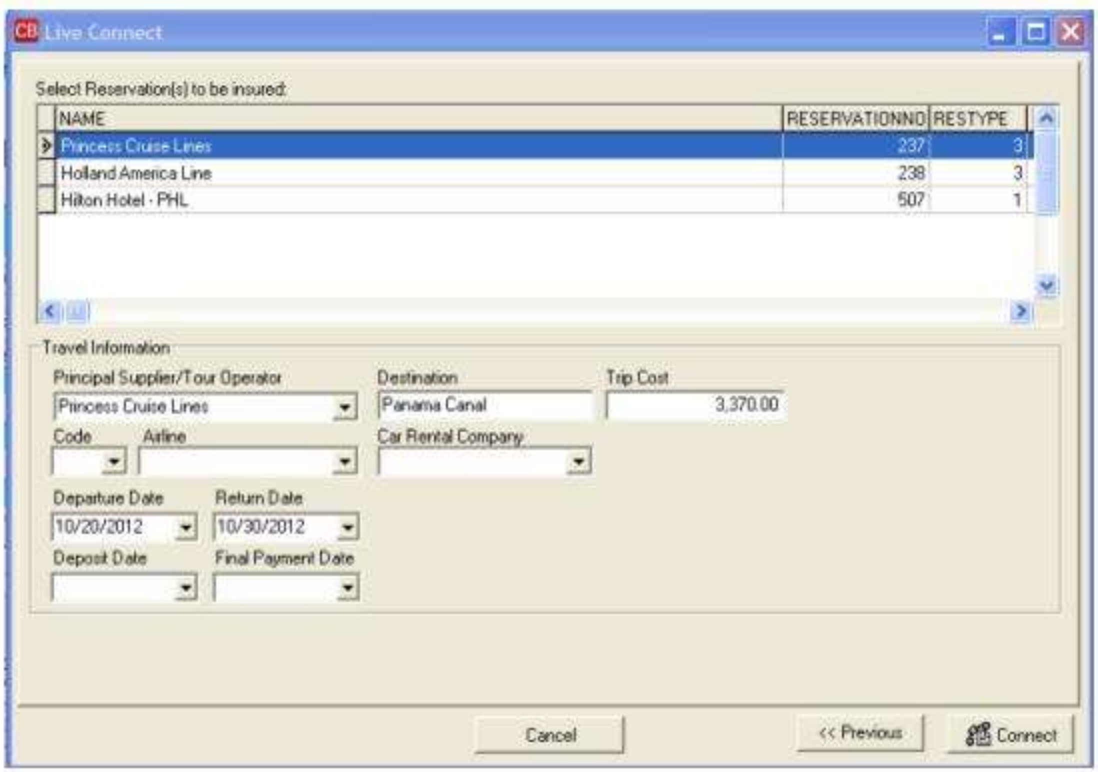
Step 2) Select Travelex from the drop-down menu by *Connect To* (if not defaulted), and then click *Create New Reservations*.

Step 3) Select any customer information for use to book the Travelex reservation.



This data is automatically passed to Travelex and saves time during the booking process, as less fields need to be completed manually. Click *Connect.*

Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the Travelex website confirming the insurance booking. Click *Connect.*

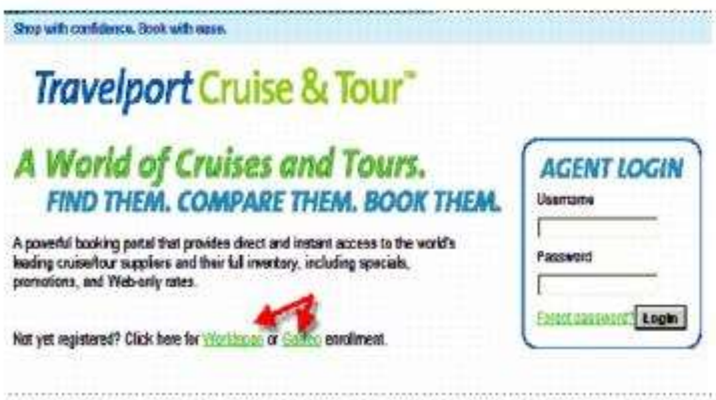


Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.

All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Travelport Cruise and Tour

Your agency must be registered to use Travelport Cruise and Tour through Galileo or Worldspan and have a valid User Name and Password. An agency product registration form link can be found on the homepage at www.travelportcruiseandtour.com.



Set Up Travelport Cruise and Tour Live Connect in *ClientBase*

Upon receiving login information, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for Travelport exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

FOR GAILEO USERS

Provider Name: Type Travelport Cruise and Tour.

URL: Type https://lcv.travelportcruiseandtour.com/

Travel Category: Select *Cruise* from the drop-down.

Import XML from: Select *HTML Source.*

Include Authentication/URL: Not Applicable

FOR WORLDSPAN USERS

Provider Name: Type Travelport Cruise and Tour.

URL: Type **https://lcv-worldspan.travelportcruiseandtour.com/**

Travel Category: Select *Cruise* from the drop-down.

Import XML from: Select *HTML Source.*

Include Authentication/URL: Not Applicable

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name and password, or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select Travelport Cruise and Tour from the drop-down list.

User Name, Password: Enter your user name and password.

Account Number: Does not apply.

Agency Code: Does not apply.

Set Up Individual Agent Login Information: Agents can set up their own user names and passwords by going to **Utilities|My Login|Live Connect** and clicking *Add.* The SYSDBA can set up for **each** user login by clicking the Live Connect tab in the User Settings by going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for provider by first clicking the *Live Connect Tab* under *User Settings* and then *Add.*

Live Connect Provider: Select Travelport Cruise and Tour from the drop-down list.

User Name, Password: Enter your user name and password.

Account Number: Does not apply.

Agency Code: Does not apply.

Step 3) When registering, Travelport Cruise and Tour provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* (if none exists) for each vendor and specify Travelport Cruise and Tour as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select Travelport Cruise and Tour from the drop-down menu and enter the correct vendor code.

Travelport Participating Vendors and Vendor Codes for Galileo Users

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
CCL	Carnival Cruise Line	Travelport Cruise and Tour
CEL	Celebrity Cruises	Travelport Cruise and Tour
CST	Costa Cruise Lines	Travelport Cruise and Tour
CRS	Crystal Cruises	Travelport Cruise and Tour
CUN	Cunard Cruises	Travelport Cruise and Tour
DCL	Disney Cruise Line	Travelport Cruise and Tour
HAL	Holland America Line	Travelport Cruise and Tour
NCL	Norwegian Cruise Line	Travelport Cruise and Tour

PLC	Princess Cruises	Travelport Cruise and Tour
RCC	Royal Caribbean International	Travelport Cruise and Tour

Travelport Participating Vendors and Vendor Codes for Worldspan Users

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
CV	Carnival Cruise Line	Travelport Cruise and Tour
CB	Celebrity Cruises	Travelport Cruise and Tour
CO	Costa Cruise Lines	Travelport Cruise and Tour
CS	Crystal Cruises	Travelport Cruise and Tour
CU	Cunard Cruises	Travelport Cruise and Tour
DS	Disney Cruise Line	Travelport Cruise and Tour
HA	Holland America Line	Travelport Cruise and Tour
NC	Norwegian Cruise Line	Travelport Cruise and Tour
PC	Princess Cruises	Travelport Cruise and Tour
RC	Royal Caribbean International	Travelport Cruise and Tour

Live Connect Features Supported by Travelport Cruise and Tour

Travelport Cruise and Tour supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

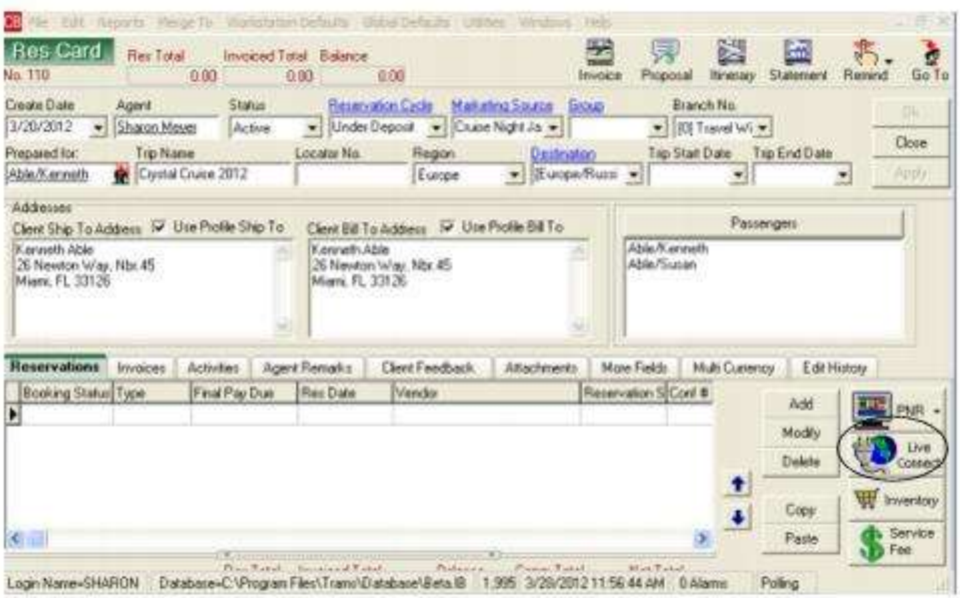
✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Reservation in Live Connect

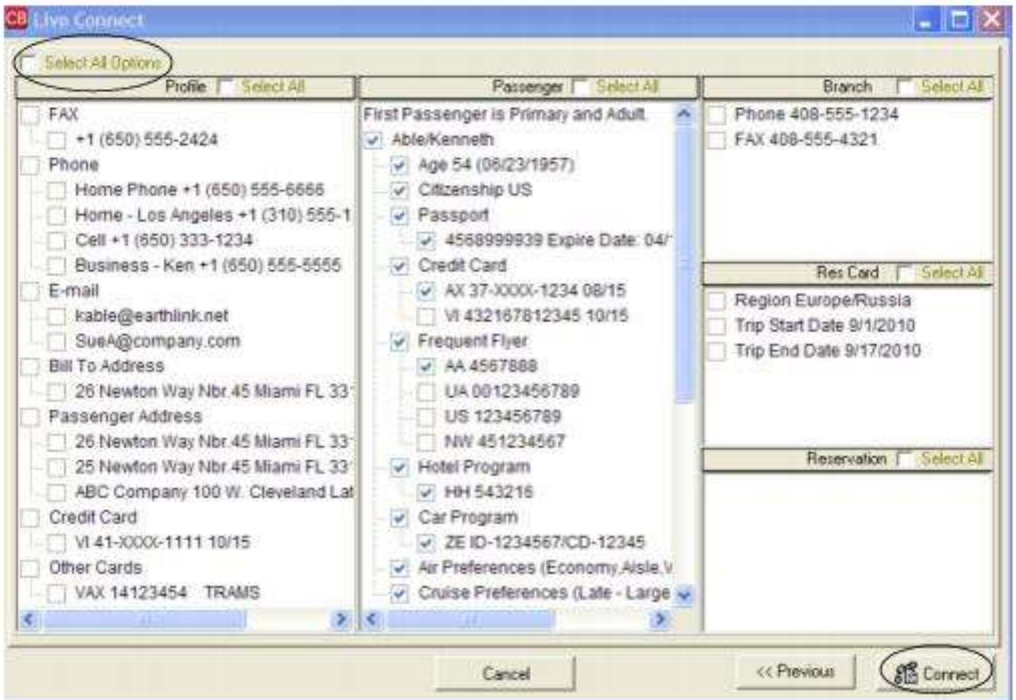
Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. If you do not know which vendor you will be using, click the Live Connect icon at the Res Card Level.



If you do know which vendor you will be using, click *Add Reservation* to start a new reservation. Select a *Vendor*, *Travel Category*, and then click *Live Connect*.

Select Travelport from the drop-down by *Connect To* and click *Create New Reservations.*

Step 2) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 3) Although still in *ClientBase*, you are now on-line at the Travelport Cruise and Tour booking site. Complete your reservation as you normally would using Travelport's booking features. If you are not familiar with how to use the booking tools, for Galileo, contact the North American Help Desk by calling their designated support number. This can vary by agency depending on the contract with Galileo.

NO HELP designated for Worldspan users.

When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* Reservation record**.**

TravelSafe Vacation Insurance

To use Live Connect to purchase TravelSafe Vacation Insurance, you must be an authorized TravelSafe representative with a current User ID (Travel Agency Code). If currently authorized, use your User ID to sell TravelSafe through *ClientBase*. The User ID is pre-printed on your current TravelSafe brochures/certificates. You also need a password and account number. Please call the TravelSafe office to receive this information. If not licensed or authorized to sell TravelSafe Vacation Insurance, please contact TravelSafe directly at 1-800-523-8020 to provide you with the necessary forms.

Set Up TravelSafe Vacation Insurance

Upon receiving a User ID and password for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for TravelSafe Vacation Insurance exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter TravelSafe Vacation Insurance.

URL: https://www.travelsafe.com/index.php/affiliates/tramspost

Travel Category: Select Insurance from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select the appropriate TravelSafe Live Connect provider to connect to its booking engine.

User Name: Enter the TravelSafe ID Code.

Password: Enter the TravelSafe password here.

Account Number: Enter the agency code obtained from TravelSafe here.

Agency Code: Leave blank. Click *OK.*

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

Live Connect Provider: Select the appropriate TravelSafe Live Connect provider to connect to its booking engine.

User Name: Enter the TravelSafe ID Code.

Password: Enter the TravelSafe password here.

Account Number: Enter the agency code obtained from TravelSafe here.

Agency Code: Leave blank. Click *OK.*

Step 3) From the Profile Manager, retrieve the TravelSafe Vendor Profile (or create if it is not in database). From the General Info tab click *Live Connect Providers*. From here, click *Add*, then select TravelSafe from the drop-down list. The vendor code is left blank. Click *OK*.

TravelSafe Features

TravelSafe supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

__ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- __ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

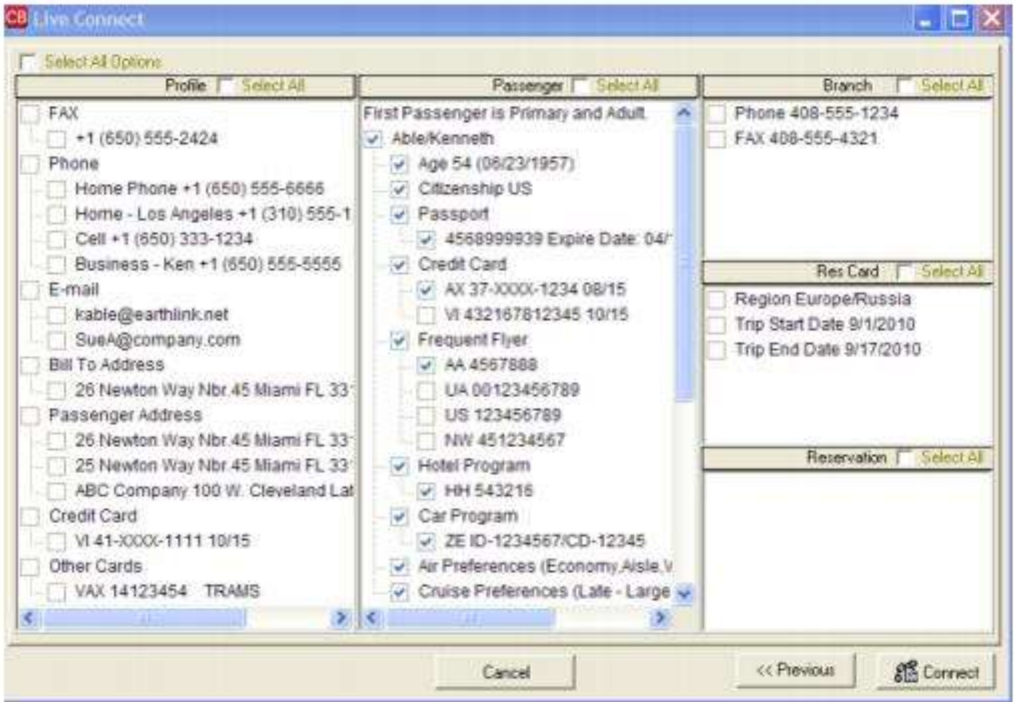
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New TravelSafe Reservation

Step 1) Click *Reservation* Tab and *Add* in the Res Card. Select TravelSafe as the vendor and click *Live Connect.*

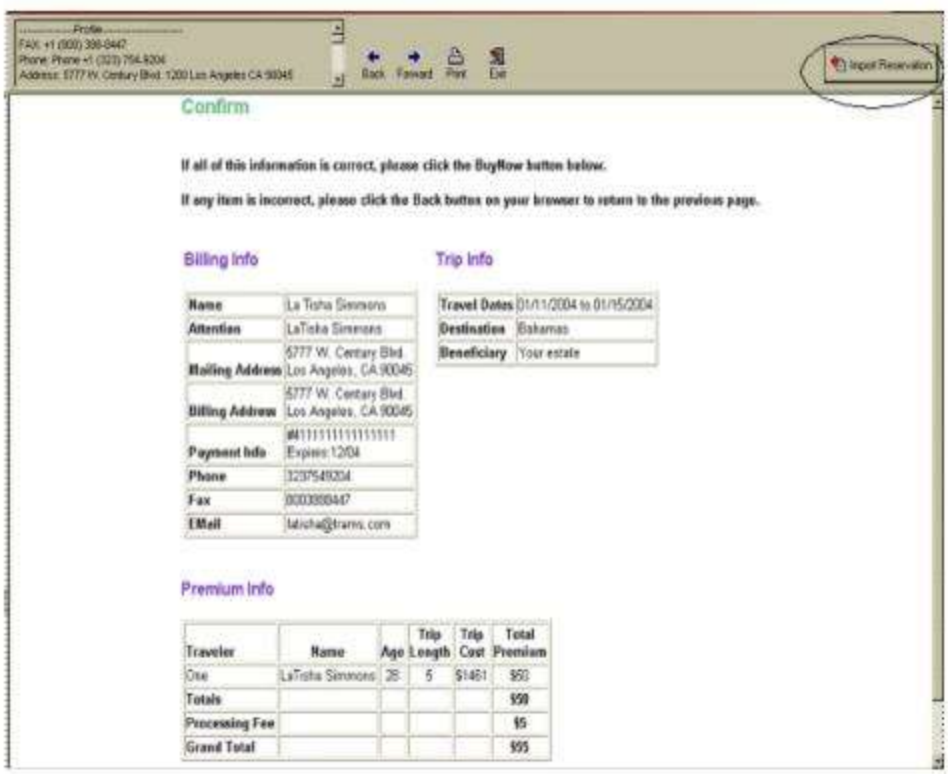
Step 2) Select TravelSafe from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select any customer information to use to book the TravelSafe reservation. This data is automatically passed to TravelSafe and saves time during the booking process, as less fields need to be completed manually. Click *Connect*.



Step 4) The system prompts with the reservation records included in this Res Card. Highlight each reservation to insure. To highlight and select multiple reservations to insure, use the CTRL key in combination with clicking, and the system completes the summary trip information. Again, this step is designed to save time during the insurance booking process. Any missing or incomplete data can be updated on the TravelSafe website confirming the insurance booking. Click *Connect.*

Step 5) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.



All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

TravTech CruiseBase

If you are not currently registered to use TravTech CruiseBase, contact TravTech Sales at 800-531-9246 or via e-mail at sales@travtech.com. Upon registering as a new user, login credentials are provided. After receiving this information for each agent, take the following steps.

Set Up TravTech CruiseBase

Step 1) Create a new or check that a Live Connect Provider for TravTech CruiseBase exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

> **Provider Name:** Enter TravTech CruiseBase.
>
> **URL: http://www.cruisebase.com/abc16/sd/lc/LiveConnectLogin.aspx**
>
> **Travel Category:** Select Cruise from the drop-down.
>
> **Import XML from:** Select *HTML Source.*

Step 2) Having obtained your login information, Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

> **Live Connect Provider:** Select TravTech CruiseBase from the drop-down list.
>
> **User Name, Password and Account Number:** Enter the necessary fields based upon the login information provided to you when you contacted TravTech CruiseBase.

Set Up Individual Agent Login Information: Users can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.*

> **Live Connect Provider:** Select TravTech CruiseBase from the drop-down list.
>
> **User Name, Password and Account Number:** Enter the necessary fields based upon the login information provided to you when you contacted TravTech CruiseBase.

Step 3) When you registered, TravTech CruiseBase provided you with a list of participating vendors and vendor codes. Locate or create a new profile in *ClientBase* for each vendor on the table below. From the Profile General Info tab, click *Live Connect Providers*. Click *Add* and select *TravTech CruiseBase* the drop-down list. Enter the vendor code from the table below. Click *OK*.

TravTech CruiseBase Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
566	Carnival Cruise Lines	TravTech CruiseBase
568	Celebrity Cruises	TravTech CruiseBase
578	Costa Cruise Lines	TravTech CruiseBase
579	Crystal Cruises	TravTech CruiseBase
580	Cunard Line	TravTech CruiseBase
582	Disney Cruise Line	TravTech CruiseBase

608	Holland America Lines	TravTech CruiseBase
624	Norwegian Cruise Lines	TravTech CruiseBase
636	Princess Cruises	TravTech CruiseBase
638	Royal Caribbean International	TravTech CruiseBase

TravTech CruiseBase Features

TravTech CruiseBase supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New TravTech CruiseBase Reservation

Step 1) When ready to book on-line, create a client res card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. If you do not know the vendor you are using, click the *Live Connect* button in the lower right hand corner of the main Res Card screen to launch TravTech CruiseBase from the Res Card level. If you do know the vendor you are booking, use the *Add Reservation* button to start a new reservation. Select *Vendor* and then click *Live Connect*.

Step 2) Select the TravTech CruiseBase from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.

Step 4) Although still in *ClientBase*, you are now on-line at the TravTech CruiseBase booking site. Complete your reservation as you normally would using TravTech CruiseBase's booking features. If you are not familiar with how to use TravTech CruiseBase booking tools, please e-mail TravTech support, helpdesk@travtech.com. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* Reservation record.

Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation*. Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in TravTech CruiseBase website, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve Existing Reservation Made Outside of *ClientBase*

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation*.

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation*. All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

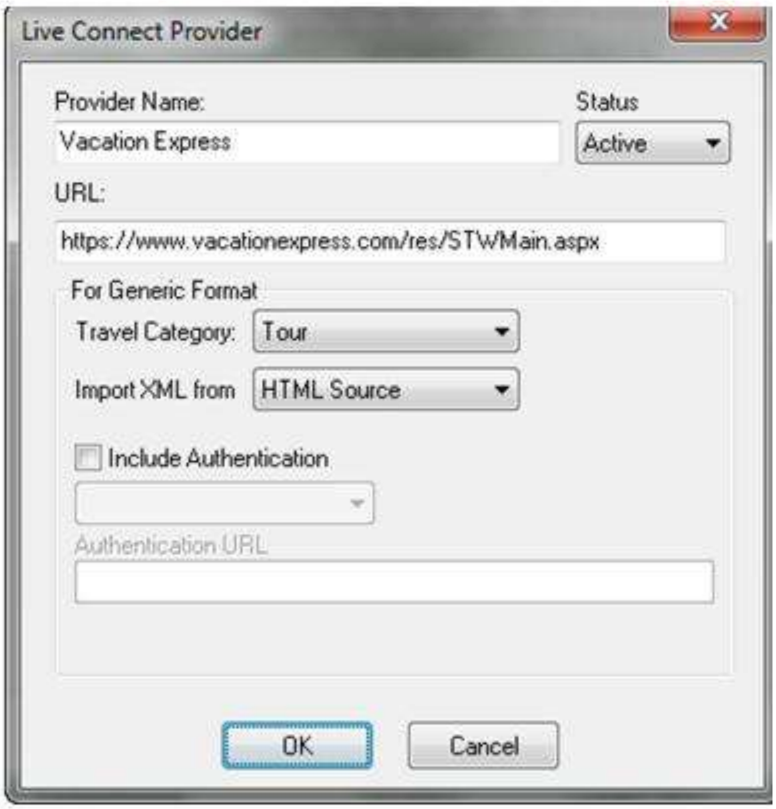
Vacation Express

Register to use Vacation Express at http://www.vacationexpress.com/NewAgencyApp.aspx**.** You may also contact the Sales Department for assistance by phone at (800) 486-9777, or by email at sales@vacationexpress.com**.**

Set Up Vacation Express

Upon receiving login information, take the following steps to setup ClientBase for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for Vacation Express exists by going to **Utilities|Live Connect Providers**, and clicking Add. (Make sure the URL is correct if Provider is present.)



Provider Name: Enter Vacation Express.

URL: https://www.vacationexpress.com/res/STWMain.aspx

Travel Category: Select Tour from the drop-down.

Import XML from: Select HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to **Global Defaults|Res Card Defaults|Live Connect Login**. Click *Add* and enter the following information:

Live Connect Provider: Select Vacation Express from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted Vacation Express. *(The Agency Number and Agency Code are not applicable.)*

Set Up Individual Agent Login Information: To set up Live Connect for each user login, click the Live Connect tab in the User Settings after logging into ClientBase as the SYSDBA and going to **Utilities|User Logins|User List**. For each user login, add a Live Connect login for Vacation Express by first clicking the Live Connect Tab under User Settings and then Add. OR….Each agent can set up their own User Name and Password by going to **Utilities|My Login|Live Connect** and then Add.

Live Connect Provider: Select Vacation Express from the drop-down list.

User Name/Password: Enter the User Name and Password based upon the login information provided to you when you contacted Vacation Express. *(The Agency Number and Agency Code are not applicable.)*

Step 3) Retrieve the Vacation Express vendor profile from the Profile Manager (or create one if not in your database). From the General Info tab, click the Live Connect Providers button. Click Add, and select Vacation Express booking engine from the drop-down list. The Vendor Code is left blank. In the Travel Category profile field, select Tour from the drop-down menu.

Vacation Express Live Connect Features

Vacation Express supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

✓ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

_ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

_ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

_ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

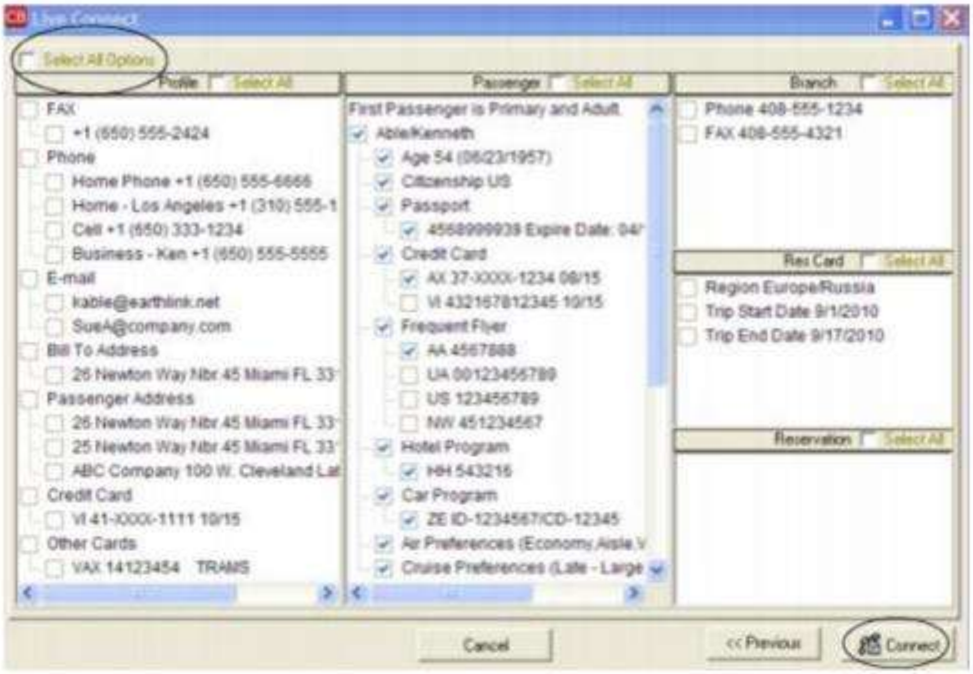
_ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Vacation Express Select Reservation

Step 1) When ready to book on-line, create a client Res Card and fill in the Reservation Cycle, Trip Name fields, Region/Destination, and select the Travelers.

Step 2) Use the Add Reservation button to start a new reservation. Enter Vacation Express as the vendor, and the Live Connect dialog box pops up for you to select Create new reservations.

Step 3) Select any customer information to use to book the Travel Express reservation. Click Connect.



Step 4) Although still in ClientBase, you are now on-line at the Vacation Express booking site. Complete the reservations using instructions supplied to you upon registration. When on the confirmation page, click Import Reservation.

All reservation data booked on-line is now located in the reservation fields in ClientBase.

VacationSelect

Sign up with Worldspan VacationSelect by selecting the VacationSelect link from the **Go! Res Script Index Book** tab.

Once the login screen is launched, Worldspan agents need to enter their VacationSelect Account Number, Name, and Password. To register for a VacationSelect login, click *Register Here.*

NOTE: This login is independent of the *Go! login* and is required for agents to shop and book on Worldspan VacationSelect from *ClientBase*.

Set Up VacationSelect

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for VacationSelect exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter VacationSelect.

URL: https://login.vaxwsn.vaxvacationaccess.com/default.aspx

Travel Category: Select Tour from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) When registering, VacationSelect provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify VacationSelect as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*. Select VacationSelect from the drop-down menu and enter the VacationSelect vendor code. (If you are using VacationSelect Dynamic, enter its unique vendor identifier.)

VacationSelect - Dynamic Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
BST	Blue Sky Tours	VacationSelect
FJ1	Funjet Vacations	VacationSelect

MMT	MGM Mirage Vacations	VacationSelect
SAB	Sandals and Beaches Resorts	VacationSelect
WNT	Southwest Airlines Vacations	VacationSelect
TPV	TNT Vacations powered by Funjet	VacationSelect
UNT	Universal Parks & Resorts	VacationSelect
AMW	US Airways Vacations	VacationSelect
VE1	Vacation Express	VacationSelect

VacationSelect Features

VacationSelect supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

__ Automatically logs you in to booking engine with User Login data from *ClientBase*.

✓ Populates booking engine with profile data from *ClientBase*.

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

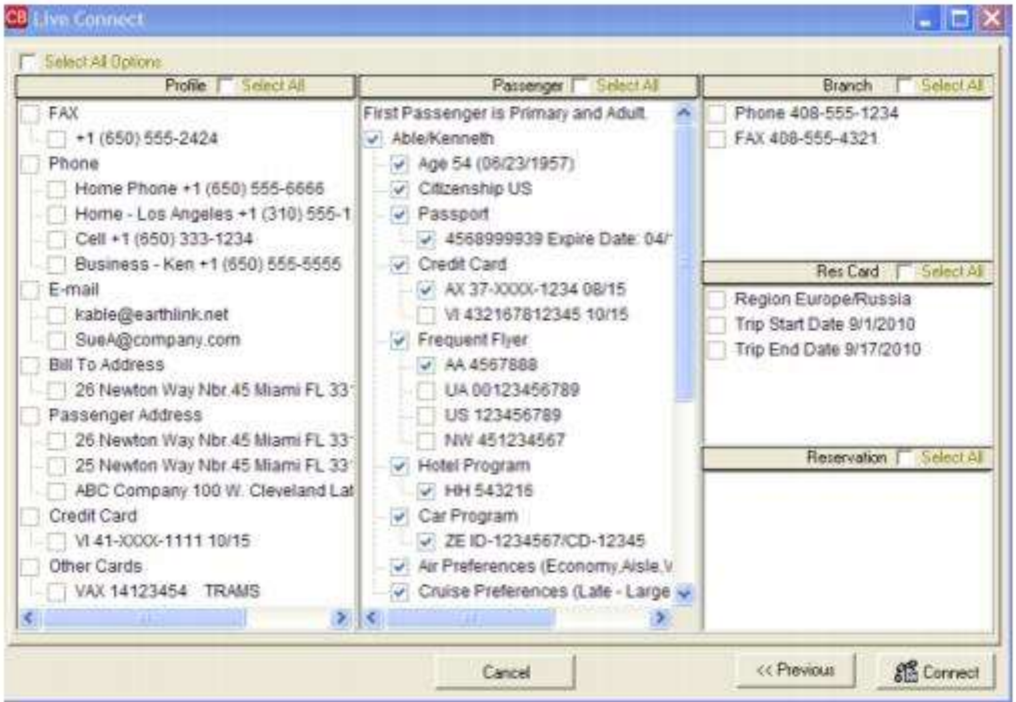
✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create a New VacationSelect Reservation

Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. Click *Add Reservation* to start a new reservation. Fill in the *Vendor* fields and then click *Live Connect*.

Step 2) Select the VacationSelect from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the VacationSelect booking site. Complete your reservation as you normally would using VacationSelect' booking features. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in the *ClientBase* Reservation record.

Import Existing Reservation Made Outside of *ClientBase*

Create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in VacationSelect website, instead of creating a new reservation, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* Reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the reservation fields in *ClientBase*.

VAX VacationAccess Vacations

Sign up with VAX VacationAccess Vacations by going to their website at www.vacation access.com . Before using VAX or VAX Dynamic in Live Connect, some setup in *ClientBase* is required. After successfully completing registration, obtain a unique user name, agency password, and account number for use in *ClientBase*. (For documentation, training or questions on the use of the Vacation Access booking process, e-mail Vaxsupport@triseptsolutions.com).

Set Up VAX Vacation Access Vacations

Upon receiving login information for each agent in your office, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for VAX Access Vacations (VAX Tour Dynamic) exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

Provider Name: Enter VAX Vacation Access Vacations.

URL: https://login.www.vaxvacationaccess.com/default.aspx

Travel Category: Select Tour from the drop-down.

Import XML from: Select *HTML Source.*

Step 2) When registering, VAX provided you with a list of participating vendors and vendor codes. Create a profile in *ClientBase* for each vendor and specify VAX Tour Dynamic as the booking engine and enter the unique vendor identifier.

First click *Live Connect Providers* and *Add* to add a *Live Connect Provider*.

VAX Tour - Dynamic Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
AST	Alaska Airlines Vacations	VAX Tour - Dynamic
BST	Blue Sky Tours	VAX Tour - Dynamic
FJ1	Funjet Vacations	VAX Tour - Dynamic
GP1	Grand Pineapple Beach Resorts	VAX Tour - Dynamic
JSV	JetSet Vacations	VAX Tour - Dynamic
MMT	MGM Mirage Vacations	VAX Tour - Dynamic
PRV	Palace Resorts	VAX Tour - Dynamic
PH1	Pleasant Holidays	VAX Tour - Dynamic
SAB	Sandals and Beaches Resorts	VAX Tour - Dynamic

STN	Showtime Tours of Nevada	VAX Tour - Dynamic
WNT	Southwest Airlines Vacations	VAX Tour - Dynamic
SYV	Sun Country Vacations	VAX Tour - Dynamic
TPV	TNT Vacations powered by Funjet	VAX Tour - Dynamic
TIM	Travel Impressions	VAX Tour - Dynamic
UAV	United Vacations	Vax Tour - Dynamic
UNT	Universal Parks & Resorts	VAX Tour - Dynamic
AMW	US Airway Vacations	VAX Tour - Dynamic
VE1	Vacation Express	VAX Tour - Dynamic

VAX Features

VAX supports the following Live Connect features if checked off by ✓¶

¶

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)¶**

__ Populates booking engine with User Login data *ClientBase*. Only takes special CB Agency Code.¶

✓ Populates booking engine with profile data from *ClientBase*.¶

✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.¶

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)¶**

✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.¶

✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.¶

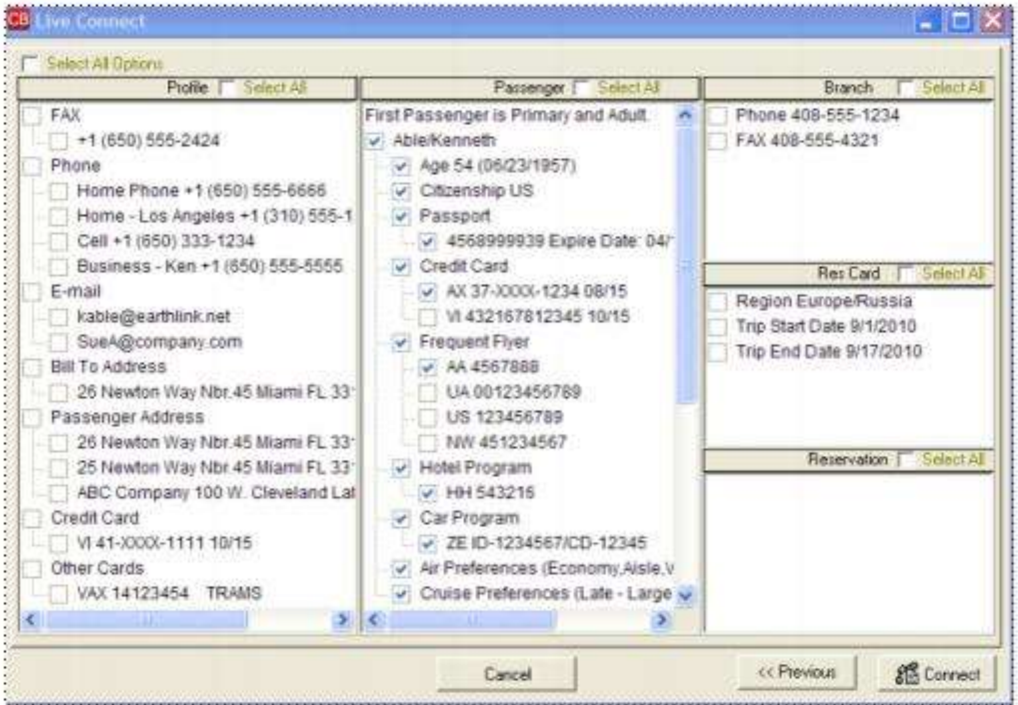
✓ **RETRIEVE RESERVATION** - Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.¶

Create New VAX Reservation

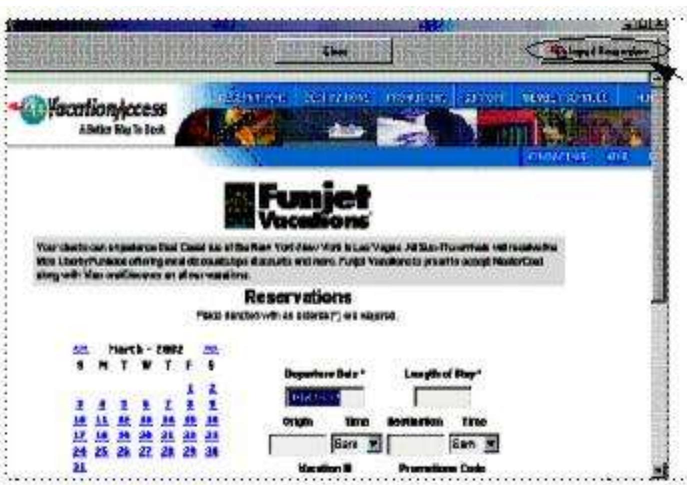
Step 1) When ready to book on-line, create a client Res Card and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. If you do not know the vendor you are using, click the *Live Connect* button in the lower right hand corner of the main Res Card screen to launch Vacation Access Vacations from the Res Card level. If you do know the vendor you are booking, use the *Add Reservation* button to start a new reservation. Fill in the *Vendor* field and then click *Live Connect*.

Step 2) Select the VAX Tour from the drop-down menu by *Connect To* and then click *Create New Reservations*.

Step 3) Select customer data to book the reservation (*Traveler, Credit Card, Phone and Billing Address)* and click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the VAX Tour booking site. Complete the reservations using instructions supplied by Vacation Access when you registered. If you have not received these instructions, e-mail **vaxsupport@triseptsolutions.com**. When the reservation is confirmed, click *Import Reservation.* All reservation data booked on-line is now located in *ClientBase*.



Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation.* Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in VAX website, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from inside the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled online is now located in the *ClientBase* reservation record.

Walt Disney Parks and Resorts

If you are not currently registered on the Disney Travel Agent Web site, go to www.disneytravelagents.com, enter your IATA in the *To Register* field, and click *Continue*. Proceed to a brief registration page to enter your e-mail address as your User Name and select a password. (If your ARC/IATA/CLIA number is not recognized by the Disney Web site database, you are required to fill out an agency registration form.)

Set Up Walt Disney Parks and Resorts

Upon receiving a User Name and Password for each agent in your office, setup *ClientBase* for Live Connect.

Step 1) Create a new or check that a Live Connect Provider for Walt Disney Parks and Resorts exists by going to **Utilities|Live Connect Providers**, and clicking *Add*. (Make sure the URL is correct if Provider is present.)

> **Provider Name:** Enter Walt Disney Parks and Resorts.
>
> **URL: http://www.disneytravelagents.com**
>
> **Travel Category:** N/A.
>
> **Import XML from:** N/A.

Step 2) You do not have to set up agent logins for use with Walt Disney Parks and Resorts (see login information below), but you do need to create a vendor profile in *ClientBase* if one does not exist. From the profile manager, retrieve the Walt Disney Parks and Resorts vendor profile (or create if it is not in database). From the General Info tab, click *Live Connect Providers*. From here, click *Add*, then select Walt Disney Parks and Resorts from the drop-down list. The vendor code is blank. Click *OK*.

Walt Disney Parks and Resorts Features

Walt Disney Parks and Resorts supports the following Live Connect features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

> __ Populates booking engine with User Login data from *ClientBase*.
>
> __ Populates booking engine with profile data from *ClientBase*.
>
> ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

> __ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
>
> ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

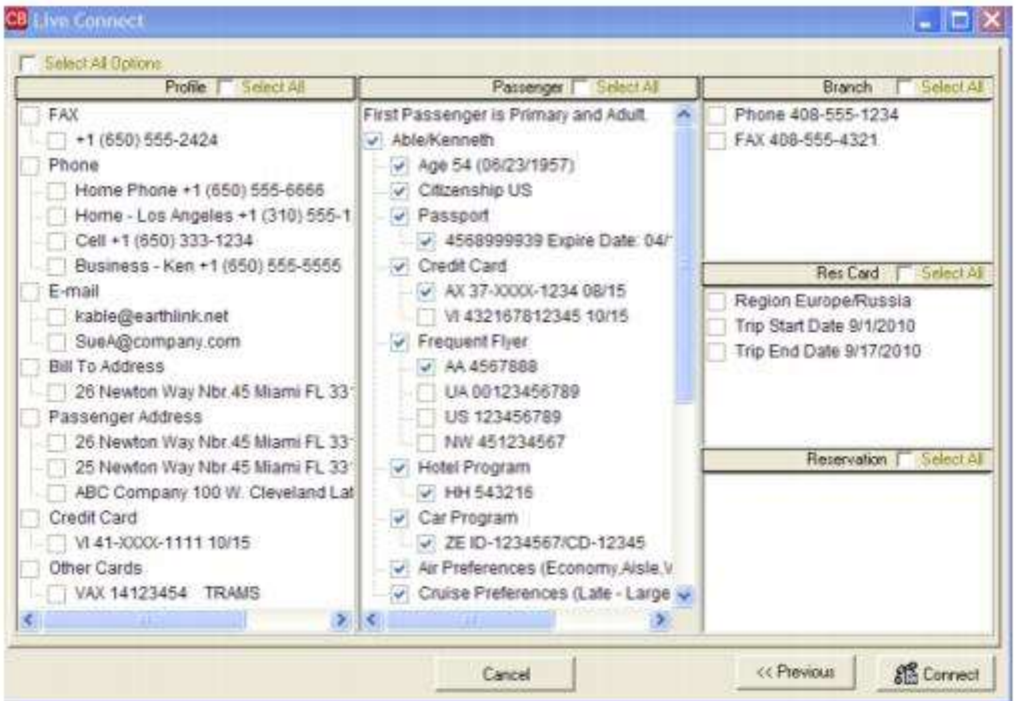
✓ **RETRIEVE RESERVATION -** Retrieves existing reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New Walt Disney Parks and Resorts Reservation

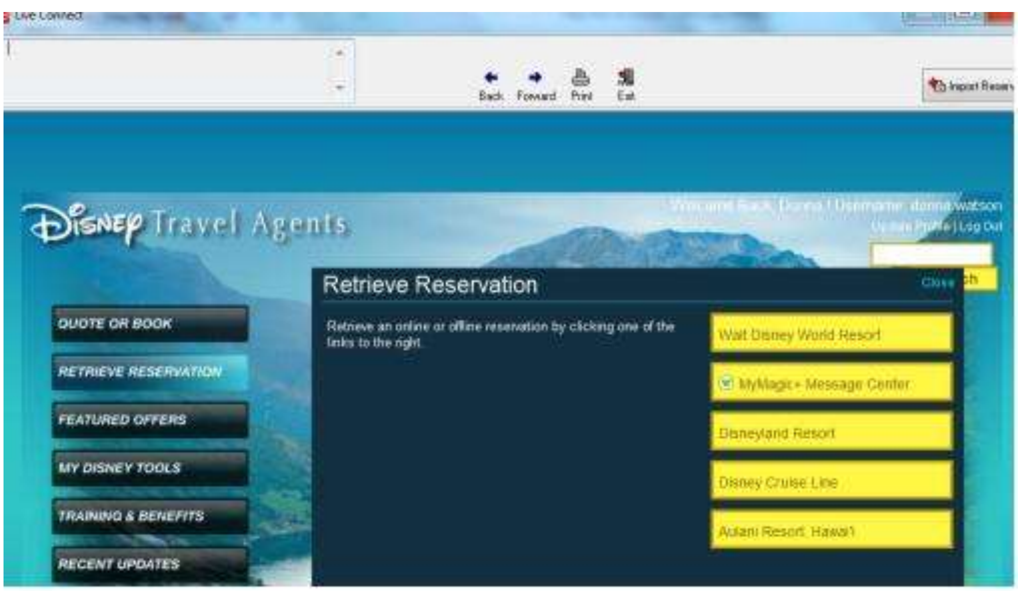
Step 1) Create a Res Card in *ClientBase*, enter the *Res Card Cycle* and *Trip Name,* and add a reservation. Enter the Travel Category and select Walt Disney Parks and Resorts as the vendor and then click *Live Connect*.

Step 2) Select Walt Disney Parks and Resorts from the drop-down menu by Connect To (if not defaulted), and then click *Create New Reservations*. (You do not need to enter any login information as this is entered at the Walt Disney Parks and Resorts Web site.)

Step 3) Select any customer information to use to book the Walt Disney Parks and Resorts reservation. This data is **NOT** passed to Walt Disney Parks and Resorts, but you are able to view it at the top of your booking screen and can highlight it, copy, and paste it into the booking fields to save you time during the booking process. Click *Connect*.



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. At this time you can book Walt Disney World packages only. Select *Walt Disney World Resort* to start the reservation.



A page appears which verifies your company affiliation, login, and password the first time you sign in (and is pre-populated with this data thereafter).

Create the booking with all traveler information (none is passed to site through *ClientBase*, but you can highlight, copy and paste information at top of screen into booking fields) and when the reservation is confirmed, click *Import Reservation* at the top of the *ClientBase* screen*.* All reservation data booked on-line is now located in the reservation.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation*. Don't fill in the confirmation number, but after logging into the Walt Disney Parks and Resorts website, click the retrieve reservation area to locate reservation.

Once the reservation details are showing, click *Import* and the details of the reservation are imported into the *ClientBase* reservation record.

Retrieve an Existing Reservation for Editing or Cancelling

To edit or cancel an existing reservation using Live Connect, follow these steps:

Step 1) Launch Live Connect from the reservation to edit or cancel in *ClientBase*.

Step 2) A dialog box appears. Click *Retrieve Reservation.*

Step 3) Live Connect launches the booking engine site. Login to the Walt Disney Parks and Resorts website, and click the retrieve reservation area. Edit or cancel the reservation using instructions supplied by the booking engine, and click *Import Reservation.* All reservation data edited or cancelled on-line is now located in the reservation fields in *ClientBase*.

WorldAgent Direct (MLT)

MLT's WorldAgent Direct includes the booking sites for Delta Vacations, Aeromexico Vacations, and Worry-Free Vacations. If not currently registered to book WorldAgent Direct on-line, go to www.worldagentdirect.com to register and obtain a WorldAgent Direct user name and password.

Set Up WorldAgent Direct

Upon receiving a user name and password, take the following steps to setup *ClientBase* for Live Connect.

Step 1) Edit the Live Connect Provider for MLT WorldAgent Direct or create one if none exists by going to **Utilities|Live Connect Providers**. (It's a good idea to check if the URL is correct.)

Provider Name: Enter WorldAgent Direct.

URL: Enter https://www.worldagentdirect.com/*trams*.do

Travel Category: Enter Tour from the drop-down menu.

Import XML from: Enter HTML Source.

Step 2) Set up for Live Connect agent logins can be done in two ways - globally (if all agents share the same user name, password or account number), or individually. When Live Connect is launched, the system first looks to see if there is login information at the User Login level, and if not, then looks for the login information at the Global Defaults level.

Set Up Global Agent Login Information: To enter one set of login information for a Live Connect provider for all agents to share, go to the Global Defaults menu and select *Live Connect Login*. Click *Add* and enter the following information:

Live Connect Provider: Select WorldAgent Direct from the drop-down list.*

User Name: Enter the user name.

Password: Enter the password.

Account Number: Enter the account number and click *OK*.

Set Up Individual Agent Login Information: **Users** can set up their own logins by going to **Utilities|My Login|Live Connect** and clicking *Add.* Complete the following fields (the other fields are grayed out as they are not applicable):

Live Connect Provider: Select WorldAgent Direct from the drop-down list.*

User Name: Enter the user name.

Password: Enter the password.

Account Number: Enter the account number and click *OK*.

Step 3) Create a profile in *ClientBase* for each vendor below (if none exists) and click the *Live Connect Providers* and *Add* in the Live Connect area. Select WorldAgent Direct from the drop-down menu and enter the unique vendor identifier as listed in the table below.

World Agent Direct - Participating Vendors and Vendor Codes

CODE	***VENDOR NAME***	***LIVE CONNECT PROVIDER***
NWV	Delta Vacations	WorldAgent Direct
AMV	Aeromexico Vacations	WorldAgent Direct
MLT	Worry-Free Vacation	WorldAgent Direct

WorldAgent Direct Features

MLT WorldAgent supports the following Live Connect Features if checked:

✓ **CREATE NEW RESERVATION (Launch, Book & Import New Reservation)**

- ✓ Populates booking engine with User Login data from *ClientBase*.
- ✓ Populates booking engine with profile data from *ClientBase*.
- ✓ Sends reservation details from booking engine's confirmation page to *ClientBase* reservation record.

✓ **IMPORT EXISTING RESERVATION (Imports new reservation booked outside of *ClientBase*)**

- ✓ Uses confirmation number to automatically pass all reservation details from booking engine to *ClientBase* reservation record.
- ✓ Allows user to browse for reservation and upon retrieval sends reservation details from booking engine's confimation page to *ClientBase* reservation record.

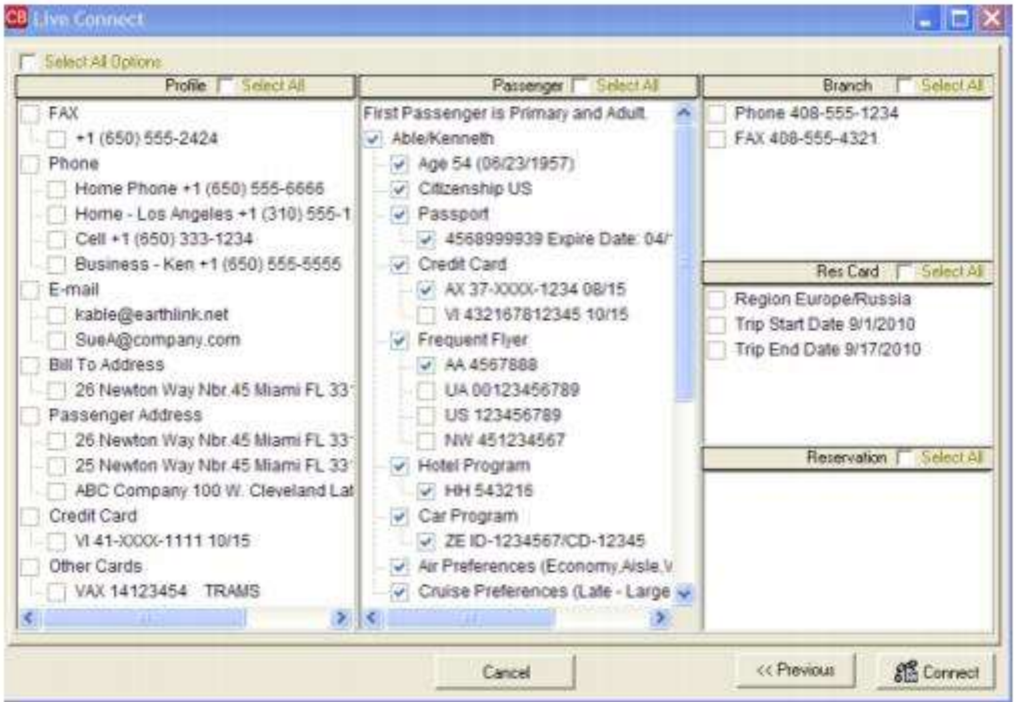
__ **RETRIEVE RESERVATION -** Retrieves exisiting reservation previously imported via Live Connect for viewing or editing. Upon editing, imports updated reservations details.

Create New WorldAgent Direct Reservation

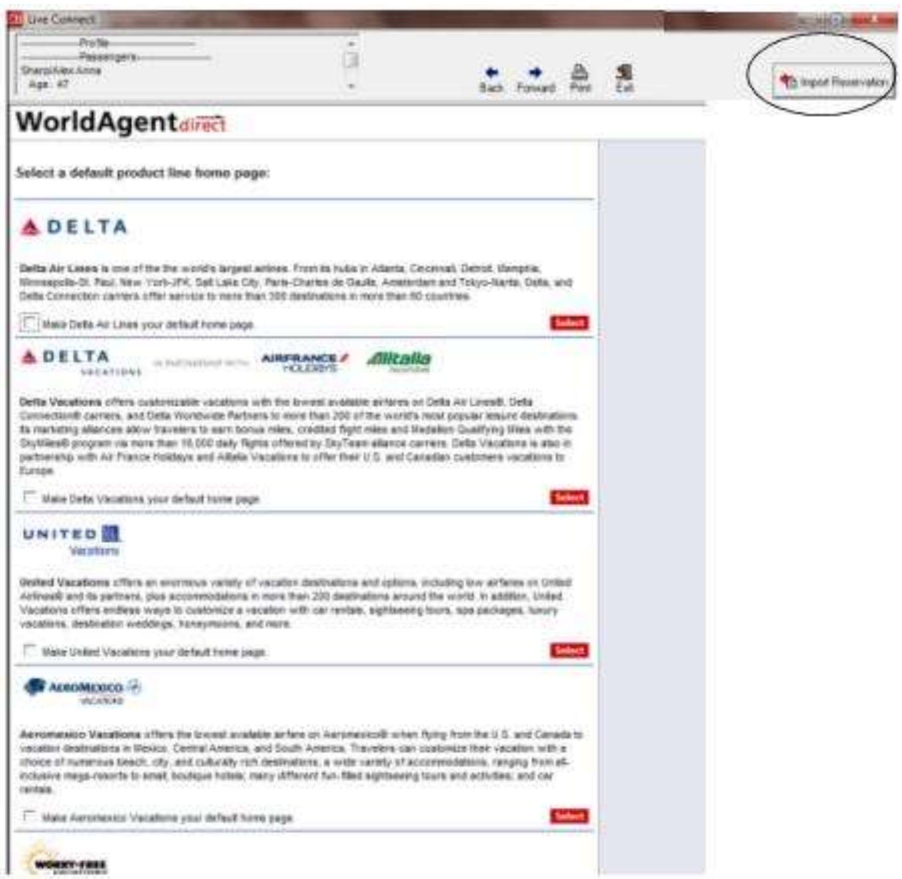
Step 1) Click the *Reservation* Tab and *Add* in the Res Card. Fill in the *Travel Category* and *Vendor* fields and then click *Live Connect*.

Step 2) Select Delta Vacations, United Vacations, Aeromexico Vacations, and Worry-Free Vacations from the drop-down menu by *Vendor* and *Live Connect,* then click *Create New Reservations*.

Step 3) Select any customer information to use for the reservation. This data is automatically passed to WorldAgent Direct and saves time during the booking process, as less fields need to be completed manually. Click *Connect.*



Step 4) Although still in *ClientBase*, you are now on-line at the booking site. Complete the reservations and when the reservation is confirmed, click *Import Reservation*.



All reservation data booked on-line is now located in the reservation fields in *ClientBase*.

Import Existing Reservation Made Outside of *ClientBase*

First, create a new reservation and click *Import Existing Reservation*. Enter the confirmation number or leave blank. If you have entered a confirmation number, the system automatically retrieves and imports the reservation. If no confirmation number is entered, when in the WorldAgent Direct website, go to the retrieve reservation area. Once the reservation details are showing, click *Import* and the details of the reservation are imported into *ClientBase* reservation record.

Chapter 14: An In-Depth Look at PNR Import

This chapter provides a detailed overview of using the PNR Import feature in ClientBase. PNR Import is currently available for Amadeus, Apollo/Galileo, Sabre and Worldspan.

Reservations stored within an Amadeus, Apollo/Galileo, Sabre, or Worldspan PNR can be imported into *ClientBase*, and new reservation records can be created within the reservation tab of the Res Card. Once the new reservations reside in the Res Card, print out client quotes, itineraries, or add additional reservations using Live Connect and generate invoices.

Set Up PNR Import for Amadeus

The PNR Import for Amadeus takes air, car, hotel and rail segments included in an Amadeus PNR and imports them into *ClientBase* Res Card reservation records. For tour and cruise bookings, users can use Live Connect to bring these into the program.

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.) *Since +Scripts is unavailable with ProWeb, PNR Import function (as well as Merge to PNR via API) DOES NOT work with it.*

Steps to Import an Amadeus PNR

To import a PNR from Amadeus take the following steps:

Step 1: Be sure you are currently logged into both Amadeus and *ClientBase*.

Step 2: Create a new Res Card or open an existing Res Card within the appropriate client profile in *ClientBase*.

Step 3: From the reservation tab at the bottom of the main Res Card screen, click *PNR Import*.

Step 4: Select Amadeus from the drop-down list in the CRS field.

Step 5: Enter the desired record locator or leave the record locator field blank to import the current, active PNR and click *Import PNR.*

Multiple reservations may be included in one PNR, therefore multiple reservations may be imported as a result of the PNR import. All segments of an air itinerary are imported into one reservation, but additional car and hotel reservations are imported into separate reservation records.

Each reservation imported into *ClientBase* must link to an existing vendor profile within the *ClientBase* database. To locate the appropriate vendor profile and automatically link to it, the system uses the Interface ID within the CRS and matches to an Interface ID within vendor profiles. If it finds a vendor profile with the same Interface ID, it imports the reservation automatically. If it does not find the Interface ID, a prompt appears indicating the Interface ID could be found. Click *Query for Vendor by Name* and manually attach the reservation to the proper vendor profile if found by using the Query screen. If the vendor is not in the database, use *Create New Vendor*, and add the vendor profile accordingly. Avoid accidentally creating duplicate vendor profiles by making sure Interface ID's are captured properly within the vendor profiles.

Special Note: When a PNR is imported from a GDS, the *Invoiced Outside of CB+* is checked by default and the reservation amount is not included in the un-invoiced balance. This keeps the reservation from being invoiced twice.

The Amadeus PNR import updates existing reservations. If the same PNR is imported multiple times, the systems now looks at the rec locator, vendor and confirmation number, and if all match, then it updates the existing reservation rather than appending it as another new reservation.

Set Up PNR Import for Apollo/Galileo

This feature takes air, car, hotel, and rail segments included in an Apollo/Galileo PNR and imports them into *ClientBase* Res Card reservation records. For tour and cruise bookings, users can use Live Connect to bring these into the program.

This feature requires FocalPoint, FocalPoint Net, Desktop AND must also have ViewPoint 3.0 or higher on each set using the PNR Import feature. Although ViewPoint does not need to be used to create or retrieve the PNR, it needs to be running in the background, as it is a View Point tool that we are utilizing that turns the PNR segments into a file that *ClientBase* can then parse and import into reservation records.

Steps to Import an Apollo/Galileo PNR

To import a PNR from Apollo/Galileo take the following steps:

Step 1: Be sure to have Viewpoint and *ClientBase* running on your set. (Again, you don't need to use Viewpoint to create or retrieve the PNR, use Focal Point to do the PNR work, but you do need Viewpoint running).

Step 2: Create a new Res Card or open an existing Res Card within the appropriate client profile in *ClientBase*.

Step 3: From the reservation tab at the bottom of the main Res Card screen click *PNR Import*.

Step 4: Select Apollo/Galileo from the drop-down list in the CRS field.

Step 5: Click *Import PNR*. This imports the current, active PNR in Viewpoint into *ClientBase*. (If you are using Focal Point, whatever PNR is active in Focal Point is also automatically be active in Viewpoint.)

Multiple reservations may be included in one PNR, therefore multiple reservations may be imported as a result of the PNR import. All segments of an air itinerary are imported into one reservation, but additional car and hotel reservations are imported into separate reservation records.

Each reservation imported into *ClientBase* must link to an existing vendor profile within the *ClientBase* database. To locate the appropriate vendor profile and automatically link to it, the system uses the Interface ID within the CRS and matches to an Interface ID within vendor profiles. If it finds a vendor profile with the same Interface ID, it imports the reservation automatically. If it does not find the Interface ID, a prompt appears indicating the Interface ID could be found. Click *Query for Vendor by Name* and manually attach the reservation to the proper vendor profile if found by using the Query screen. If the vendor is not in the database, use *Create New Vendor*, and add the vendor profile accordingly. Avoid accidentally creating duplicate vendor profiles by making sure Interface ID's are captured properly within the vendor profiles.

Special Note: When a PNR is imported from a GDS, the *Invoiced Outside of CB+* is checked by default and the reservation amount is not included in the un-invoiced balance. This keeps the reservation from being invoiced twice.

The Apollo/Galileo PNR import updates existing reservations. If the same PNR is imported multiple times, the systems now looks at the rec locator, vendor and confirmation number, and if all match, then it updates the existing reservation rather than appending it as another new reservation.

Trams Back Office Users and the Apollo PNR Import

When importing a PNR from Apollo, if you want to invoice in *ClientBase* rather than invoice in Apollo, drive the invoice and ticket using the HB:DTD command. This generates a ticket without creating a MIR (interface record). After importing the PNR into *ClientBase*, generating the invoice from *ClientBase* sends the air information (and any other items on the invoice) to *Trams Back Office* automatically. Uncheck the *Invoiced Outside of CB+* checkbox and invoice in *ClientBase*. Using this procedure eliminates duplicate invoices in *Trams Back Office*.

Set Up PNR Import for Sabre

This feature takes air, car, hotel, cruise, tour and rail segments included in a Sabre PNR and imports them into *ClientBase* Res Card reservation records. Sabre workstations must be running Sabre Red Workspace.

ClientBase uses the Sabre API as an option within the Merge to PNR Settings under **Global Defaults|Merge to PNR Defaults|Merge to PNR Setting**. To implement the API in order for the Merge to PNR and PNR Import features to work:

1. **Sabre Red Users:** An API is the tool *ClientBase* uses to connect to the Sabre Host. In order for PNR Import (and Merge to PNR) to work, you must enable the Sabre Emulator API within Sabre Red. Select **Tools|Options|Sabre System|Advanced** and check *Sabre Emulator API*:

2. In *ClientBase* go to Global Defaults then select Merge to PNR Settings. Set the Reservation System to Sabre and select *Use API* from the drop down listing. (Other choice is *Use Clipboard*.) Please note that this setting can be overwritten on a workstation-by-workstation basis by going to Workstation Defaults then Environment then clicking the Merge to PNR Settings tab from the desired workstation.

3. Use the Merge to PNR and PNR Import features as normal.

Steps to Import a Sabre PNR

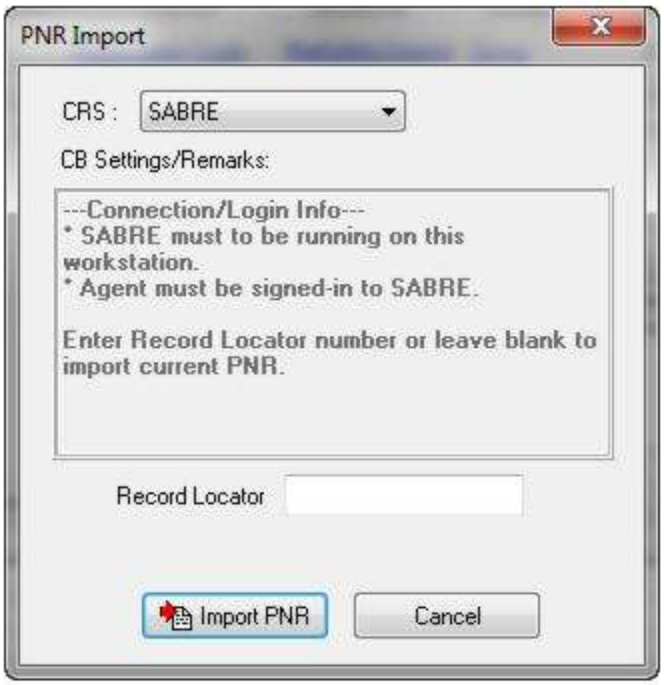
To import a PNR from Sabre take the following steps:

Step 1: Be sure you are currently logged into both Sabre and *ClientBase*.

Step 2: Create a new Res Card or open an existing Res Card within the appropriate client profile in *ClientBase*.

Step 3: From the Reservation tab at the bottom of the main Res Card screen, click *PNR Import*.

Step 4: Select Sabre from the drop-down list in the CRS field.



Step 5: Enter the desired record locator or leave the record locator field blank to import the current, active PNR, and click *Import PNR*.

Multiple reservations may be included in one PNR, therefore multiple reservations may be imported as a result of the PNR import. All segments of an air itinerary are imported into one reservation, but additional car and hotel reservations are imported into separate reservation records.

Step 6: Each reservation imported into *ClientBase* must link to an existing vendor profile within the *ClientBase* database. To locate the appropriate vendor profile and automatically link to it, the system uses the Interface ID within the CRS and matches to an Interface ID within vendor profiles. If it finds a vendor profile with the same Interface ID, it imports the reservation automatically. If it does not find the Interface ID, a prompt appears indicating the Interface ID could NOT be found. Click *Query for Vendor by Name* and manually attach the reservation to the proper vendor profile if found by using the Query screen. If the vendor is not in the database, use *Create New Vendor*, and add the vendor profile accordingly. Avoid accidentally creating duplicate vendor profiles by making sure Interface ID's are captured properly within the vendor profiles.

Special Note: When a PNR is imported from a GDS, the *Invoiced Outside of CB+* is checked by default and the reservation amount is not included in the un-invoiced balance. This keeps the reservation from being invoiced twice.

The Sabre PNR import brings in cruise and tour segments in addition to air, rail, car and hotel segments. Keep in mind that the PNR import only parses and imports the data contained in cruise and tour segments, not the accounting lines. If the cruise or tour segment is formatted to include pricing information then the price is imported, if pricing is formatted as a remark, then the price is imported to remarks and the pricing fields in the *ClientBase* reservation must be manually entered.

The Sabre PNR import updates existing reservations. If the same PNR is imported multiple times, the systems now looks at the rec locator, vendor and confirmation number, and if all match, then it updates the existing reservation rather than appending it as another new reservation.

Trams Back Office Users and the Sabre PNR Import

Trams Back Office customers need to make decisions on how they are going to handle what's being invoiced in Sabre and conversely in *ClientBase*.

Problem: You create a PNR and then import it into *ClientBase* - for example a ticket and service fee. Next you create an invoice with those items which automatically land in *Trams Back Office* with a *ClientBase* generated invoice number. Now you need to drive the ticket and service fee in Sabre in order to generate the ticket and MCO for the service fee. When you interface to *Trams*, you now have 2 invoices in *Trams* with different invoice numbers (one generated by *ClientBase*, the other by Sabre). There is no option with Sabre to drive just a ticket without generating an invoice number and interface record.

Solutions:

Option 1 - Drive the invoice for air and services fees from Sabre. Drive any other bookings from *ClientBase*.

<u>Example Bookings - Air, Cruise or Tour, Service Fee</u>

1. Once the data has been imported to the Res Card, uncheck the box, *Include Summary of All Reservations*, so that only the invoiced items show on the *ClientBase* invoice. If there is a cruise or tour on the Res Card in conjunction with air and service fee, just invoice the cruise or tour from the Res Card.

2. Drive the ticket and MCO for the service fee from Sabre.

Results: You have 2 invoices for the customer and 2 invoices in TBO (one from *ClientBase* and one from Sabre). There is an un-invoiced amount on the Res Card for the air and service fee.

Option 2 - Create a separate POS queue in Sabre. Sabre may charge the agency to set this up as it is considered an additional "device."

1. The agency imports the PNR to the Res Card.

2. The agency drives the invoice in Sabre (to generate the ticket and MCO) with the command to send this interface record to an alternate POS queue.

POS Queue #1 - This queue transmits interface records to *Trams Back Office* that are NOT imported into the Res Card.

POS Queue #2 - This queue holds interface records that were imported into the Res Card - hence they will never DX transmit this queue. Sabre needs to clean the records out of this queue periodically.

Results: The agency would have one invoice with all bookings in the Res Card on it to give to the customer and one invoice in *Trams Back Office*.

Special Note: When a PNR is imported from a GDS, the "Invoiced Outside of CB+" is checked by default and the reservation amount is not included in the Un-invoiced Balance. This keeps the reservation from being invoiced twice. If you are creating another reservation in *ClientBase*, make sure the *Invoiced Outside of CB+* area remains unchecked.

Set Up PNR Import for Worldspan

This feature takes air, car, hotel, cruise, tour automated (Amtrak) rail and agency service fee (TVL) segments included in a Worldspan PNR (Worldspan Go! Res Dedicated or Internet 4.0 or above) and imports them into ClientBase Res Card reservation records. Contact your Worldspan Account Manager to enable a DIR Device, assign you a unique agent Pool Name, and provide you with a unique agency Connection ID. Worldspan has waived all fees associated with enabling these features for ClientBase customers.

Notes: Worldspan: PNR Import includes the OA record locator. The Airline Locator Number can be found on the Flight Details tab in the Service Provider section of the Reservation. Also the Worldspan PNR Import captures the hotel room rate from the rate guarantee field if available.

Step 1) Contact your Worldspan Account Manager to enable a DIR Device, assign you a unique agency Pool Name, and Obtain a unique agency Connection ID.

Step 2) Your unique agency Connection ID needs to be added to a registry setting at **each** workstation from which you plan to run *ClientBase*. To set this registry setting from each workstation, Go to http://www.trams.com/home/support/misc_downloads/ and select Workstation GDS API Files. Move down the page to Worldspan and click on the red letters (here). A prompt may appear twice, select Run both times. Enter the connection ID when prompted.

Step 3) *ClientBase* needs to pass an Agent Sine, and your Agency Pool Name to Worldspan when PNR Import is performed. To set this so it defaults automatically, you can enter each Agent Sine and Agency Pool Name into each User Login record. To do this, have each User log into *ClientBase* and go to **Utilities|My Login|PNR Import**. Click *Add* and set the CRS to Worldspan, entering agent's login Sine into *Agent Sine*, and Agency Pool Name into the field, *Agency Pool Name*. Each time this User performs a PNR Import the Agent Sine and Agency Pool Name default automatically. The SYSDBA can also enter this information into each User Login record by logging into *ClientBase* as the SYSDBA and going to **Utilities|User Logins|User List** and retrieving each Login record and updating accordingly.

Special Note: Worldspan has recently changed the way agents log into Worldspan. Previously agents used the format BSI$1234RE/GS and ClientBase used this sine in setup under **Utilities|myLogin|PNR Import** as 1234RE/GS to work with the PNR Import feature. Worldspan now has agents changing the format of their login to 8-12 character with at least one character being numeric and they now have to add a slash and a password. This password will be changing every 90 days. Agents will need change their sine in ClientBase to the following format 1234RE/GS/Password, inserting their true password in that entry. Without changing this in ClientBase, PNR Import will not work.

For agents who do not want to change the password every 90 days, they can complete Worldspan's Password Exemption Qualification Request Form and file for exemption.

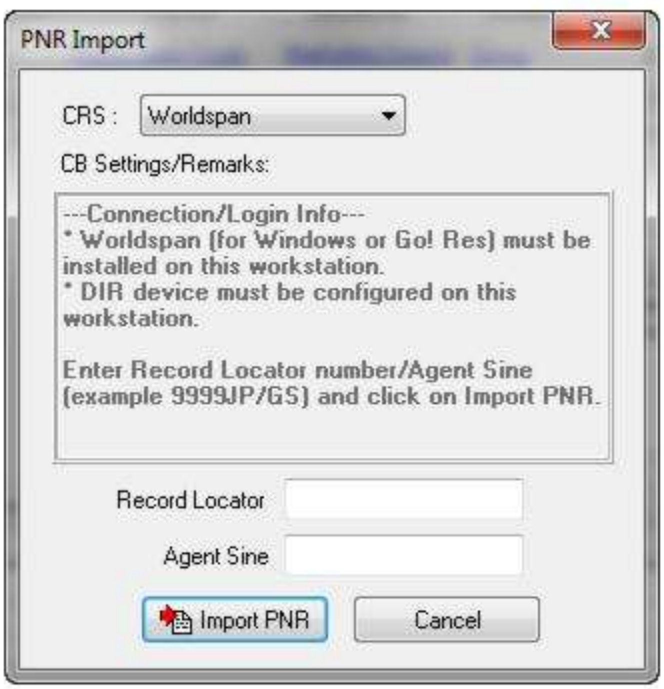
Steps to Import a Worldspan PNR

To import a PNR from Worldspan take the following steps:

Step 1) You do not have to be currently logged into Worldspan, as this process will automatically open it for you.

Step 2) Create a new Res Card or open an existing Res Card within the appropriate client profile in *ClientBase*.

Step 3) From the Reservation tab at the bottom of the main Res Card screen, click *PNR Import* and Worldspan from the drop-down list.



Step 4) Enter the desired Record Locator and be sure the Agent Sine default is complete, or enter your Agent Sine, and click *Import PNR*.

Step 5) Multiple reservations may be included in one PNR, therefore multiple reservations may be imported as a result of the PNR import. All segments of an air itinerary are imported into one reservation, but additional car and hotel reservations are imported into separate reservation records.

Step 6) A reservation imported into *ClientBase* must link to an existing vendor profile within your *ClientBase* database. To locate the appropriate vendor profile and automatically link to it, the system uses the Interface ID within the CRS and matches to an Interface ID within your Vendor profiles. If it finds a vendor profile with the same Interface ID, it imports the reservation automatically. If it does not find the Interface ID, then a prompt appears indicating the Interface ID it could not find. Click *Query for Vendor by Name* and manually attach the reservation to the proper vendor profile by using the Query screen. If the vendor is not yet in your database, then use *Create New Vendor* to add the vendor profile accordingly.
Special Note: Avoid accidentally creating duplicate vendor profiles by making sure Interface ID's are captured properly within the vendor profiles you work with frequently.

Step 7) All reservations imported via PNR Import default to *Invoiced Outside CB+* as we assume you are using Worldspan to generate the invoice and/or ticket and interface record to your back office system. If you choose to generate the invoice from *ClientBase*, remove the check from this field in the reservation.

Chapter 15: Using the Res Card Manager to Manage Your Res Cards

This section details the use of the Res Card Manager to easily organize and manage reservation and trip data stored neatly in Res Cards.

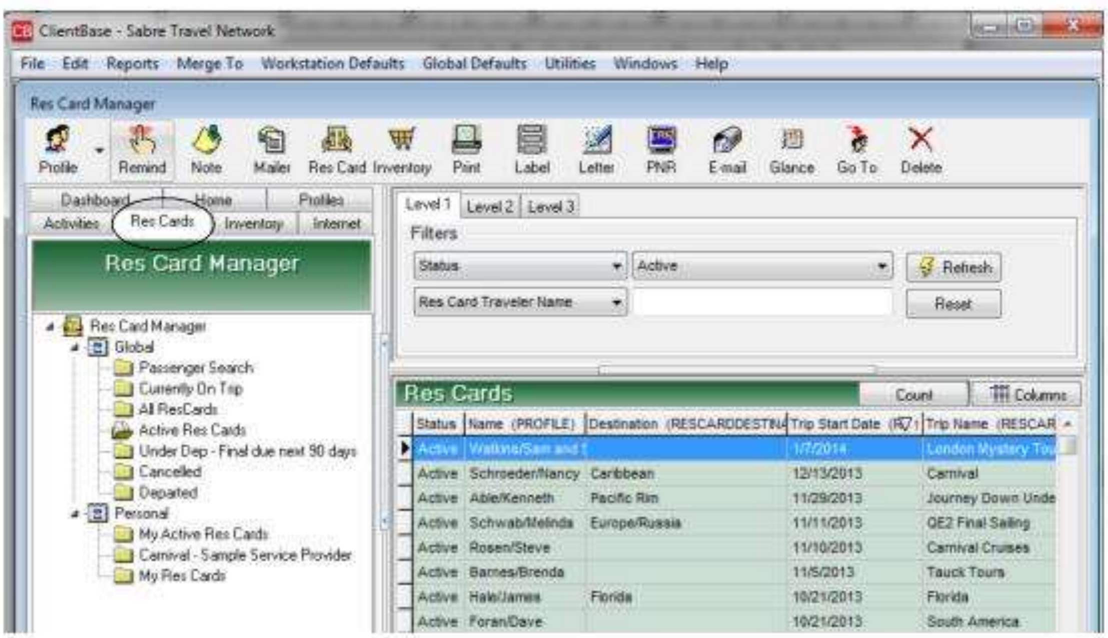
Introduction

The purpose of the Res Card Manager is to automate the filing cabinet which has historically contained hundreds of paper index cards and file folders that have for years cluttered agencies. In the past, agents often entered details of leisure type reservations (client information, confirmation numbers, itineraries, vendor information, remarks, etc.) on cards or paper. Agents kept these cards somewhere on their desks or somewhere in their files. That "somewhere" translated into precious time spent searching for the reservation information, especially when the booking agent was not available and someone else needed to locate the information. As agents begin automating their non-CRS reservation information into *ClientBase* Res Cards, the Res Card Manager provides a tool to organize and manage the entire database of Res Card records. Imagine viewing all active Res Cards with the click of a button.

Query Your Database of Res Cards

When opening the Res Card Manager, by default no Query filters are entered, therefore, all active Res Cards in the database appear in the Query results screen. Each line represents one Res Card which in turn represents one trip. To filter the database results, either click a folder containing a stored set of Query fields, or use Level 1, Level 2, or Level Query fields to filter the database.

ResCard Manager



A list of Query folders is located in the Res Card Manager. The global folders are accessible to anyone for general viewing. They include Active, Departed and Cancelled Res Cards, and any folders with a customized set of Query filters (see section below *Saving Queries for Easy Access*). Personal folders contain saved queries created by users and customized for their own particular user login. By clicking any of these folders, see the completed filters used for this stored Query, and a listing on the results screen of all profiles meeting the criteria of the selected Query filters.

By right-mouse clicking in the results screen, access the ability to Modify, Delete a Res Card, Refresh the Query, Invert all, Select all, Unselect all, and Modify Columns.

Level 1 Res Card Manager Query

The Level 1 Res Card Manager Query provides a way to quickly locate a Res Card or a group of Res Cards by simply completing one or two Query filters.

The drop-down menu fields identify what to search *by* and are completed by selecting from the following: *Agent Name, Trip Name, Status, Reservation Cycle, Source of Booking, Locator No., Group Name, Region.* The defaults for these two fields are *Agent Name* and *Status.*

The blank field allows you to make a selection from a default pull-down list, or type in free-flow information if there is no pull-down list. To prevent spelling errors, it is suggested to type no more than 3 or 4 characters in the free-flow fields. An arrow to the right of the blank field indicates a list from a pull-down menu exists. If both fields are used in the Query, then the results match both (All) criteria, not either/or (Any). This means the Query filters are strung together with an “and” not an “or.” After completing or changing data in the filters, the system automatically sifts through the database and displays the matching profiles in the Query results screen.

For example, if agent Sharon wants to review all her active Res Cards in the system, she sets the first field to *Agent Name* and selects the name *Sharon* from the pull-down menu list. She sets the second field to *Status* and selects “Active” from the pull-down menu. Finally, she clicks on *Refresh* to see a list of all her active Res Cards in the system.

Level 2 Res Card Manager Query

The Query Level 2 provides additional filters to more narrowly define a search. Search filters are selected by clicking *Filter,* and then completing as many of the search criteria fields as desired.

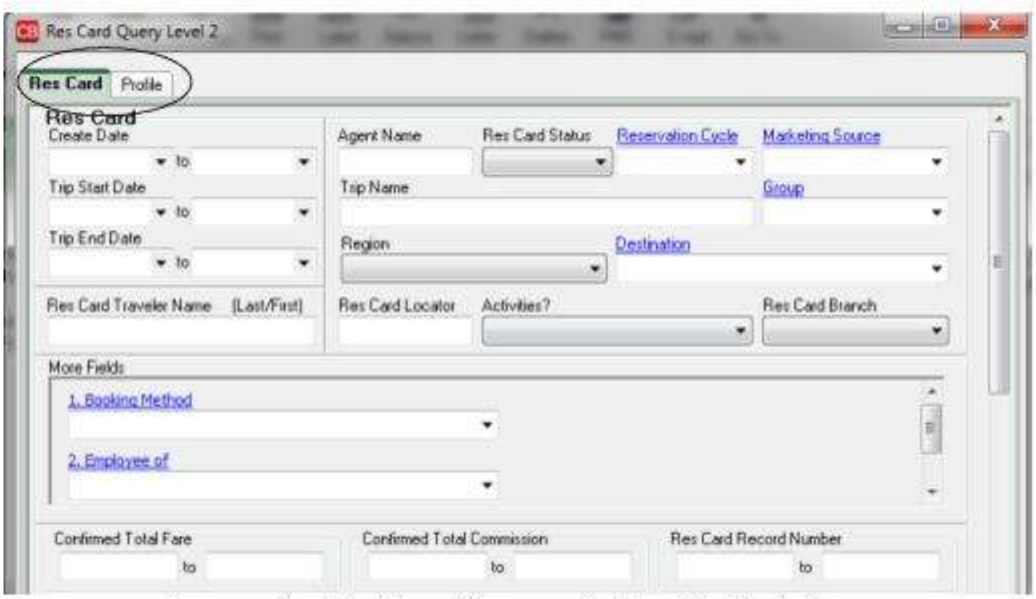
The Query screen is divided into three Query levels or layers that move from more general information at the Res Card level to very specific, detailed search criteria at the service provider level.

1. ResCard

2. Reservation Level

3. Service Provider

RES CARD TAB



Use general profile data as filters as well. Query Res Cards for a particular client and print the results.

1. **Res Card Level**: Except for selecting the date range to search by, the trip name and Locator #, all other search fields have a pull-down menu indicated by the arrow to the right of the field for easy selection. User-defined fields are underscored and appear in blue print (Reservation Cycle, Source of booking, Group and Region). The Res Card Query level is composed of broader Query fields and generally includes a greater number of Res Cards in the Query results screen.

2. **Reservation Level:** The reservation Query level fields focus on the specific components of the reservation - *Travel Category*, *Vendor, Reservation Status* and *Payment Information*.

3. **Service Provider Level:** The fields at the service provider level, when completed, can be extremely helpful as a quick reference when a customer calls in requesting information on a particular reservation. These fields also serve as useful reporting fields to tell an agency which service providers are the most frequently used. Having this information can be very helpful when negotiating overrides with service providers or reviewing the use of preferred vendors with agents. From travel category and beginning and ending dates of specific reservations such as cars and hotels, to individual client preferences such as cabin or dining preferences, these fields very narrowly define the query.

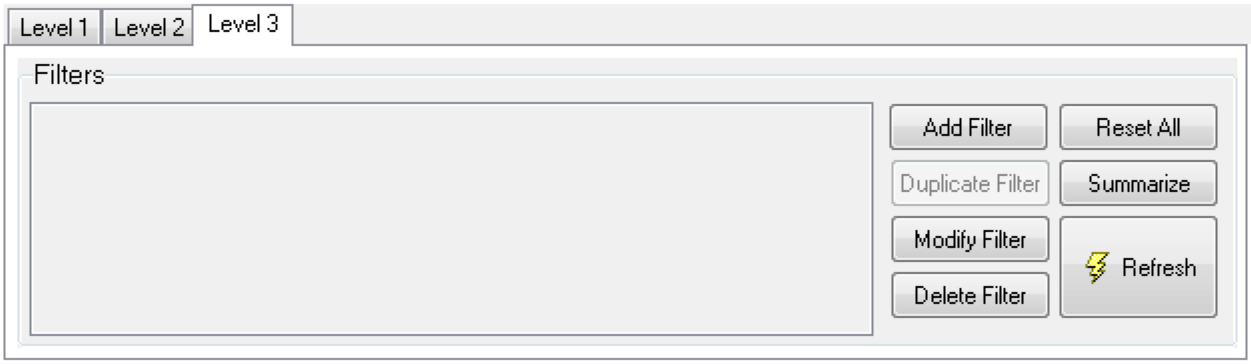
PROFILE TAB

Use general profile data as filters when running a Level 2 Query in the Res Card Manager. Query by profile to locate Res Cards and print results, as well as enhance your ability to query lists of Res Cards.

Level 3 Res Card Manager Query

The Query Level 3 provides users with an even greater ability to more narrowly define a search. As detailed above, Level 2 Query allows a search by any number of fields, stringing one statement of criteria together with an "and." Query Level 3 strings multiple statements of criteria together with an "or," using search method options to define how the criteria should filter.

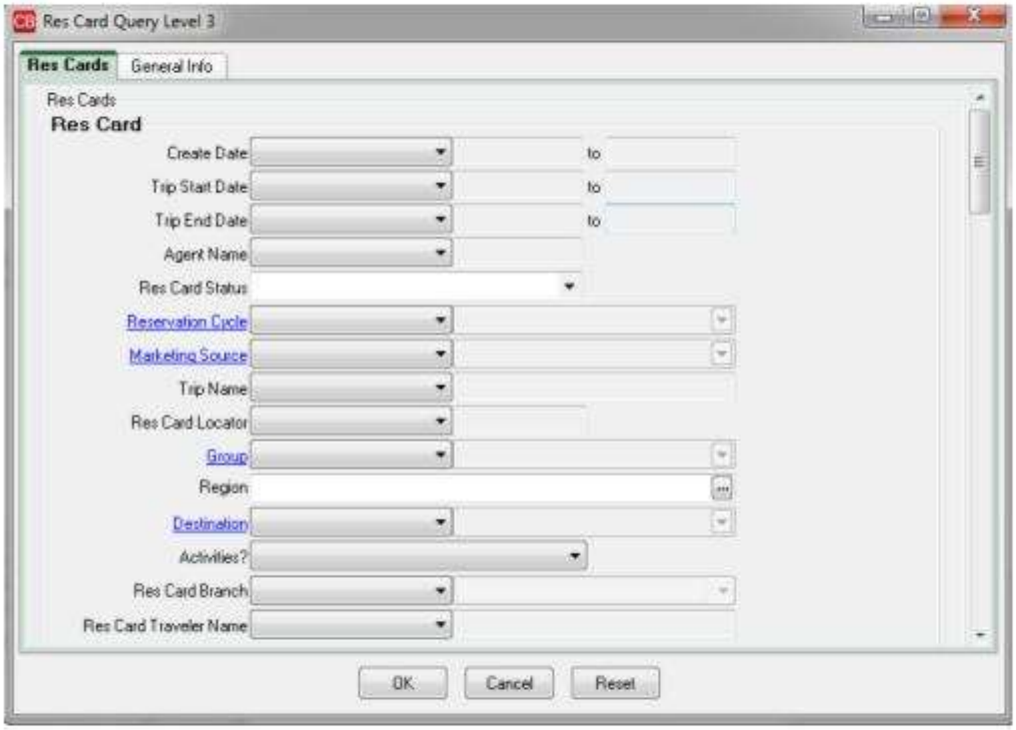
The Level 3 Query has a totally different look from Level 2 Query:



There are a set of buttons including *Add Filter, Duplicate Filter, Modify Filter, Delete Filter, Reset All* (to clear out all filters currently displayed), and *Summarize*. Notice there is nothing to view in the results screen. This is because you need to setup the criteria statement(s) and click Refresh to see the Level 3 Query results.

Note: It is not necessary to completely re-enter the criteria when adding similar filters. Once the first filter has been added to a Level 3 query, the *Duplicate Filter* button is enabled. When clicked, a Level 3 query screen is opened, pre-populated with all of the criteria from the selected filter. Users can also right-click on a filter and select *Duplicate Filter*.

To enter the search criteria into Level 3 Query after clicking *Reset All*, click *Add Filter*:



Res Card folder tabs, *Res Cards* and *General Info appear.* What is unique about the Level 3 Query is that most of the available search fields are divided into two parts. Directly to the left of the field, is a box with a drop-down menu of search method options called, Operators, with which you can narrow down your search. Sample Operators include: *Is Equal to; Less than or Equal to; Greater than or Equal to; Less than, Greater than, Not Equal to; Starts With; Contains; Is BLANK;* **and** *Is NOT BLANK.* Search fields are strung together with an *And.* Use both tabs to setup the first filter or your query, and click *OK.* Click *Refresh* to see the results of your first filter.

To set up a second filter, click *Add.* Remember as you are setting up subsequent filters, there is an OR between all the filters you are stringing together, and you will not get results unless you click *Refresh*.

Using Date Formulas in Queries

Since queries can be saved and retrieved for frequent use, the date fields in all queries allow for date formulas. This means any field that has a date, can also contain a formula for that date. The date formula function allows you to create a query without identifying a specific month, day and year in the *From* and *To* date fields. Instead, the query is processed with a formula for the month, day, day of the week, and year based upon the date the report is processed.

Remember: Make sure system date and time are correct.

Benefit: When entering a date formula, the system converts it to the intended time period to run queries and/or save them for future use without the need to modify dates.

Example: The following tables contain sample formulas for specifying dates. Mix and match the absolute and relative parameters in the function. The first number specifies the day of the month, the second number specifies the month, and the third number specifies the year. So if you only have the first number filled in, this means you intend this report to reoccur on this day every month, in every year.

DATE FORMULAS

If You Want This	Enter This
1st day of this month:	=1,0,0

Last day of this month:	=31,0,0
1st day of this year:	=1,1,0
Last day of this year:	=31,12,0
Seven days from now:	=+7,0,0
Last Monday (will show today if today is Monday)	=Mon
A week from last Monday	=Mon-1
Next Monday	=Mon+1
Three months from now	=0,+3,0
Six months ago:	=0,-6,0
One year from now	=0,0,+1

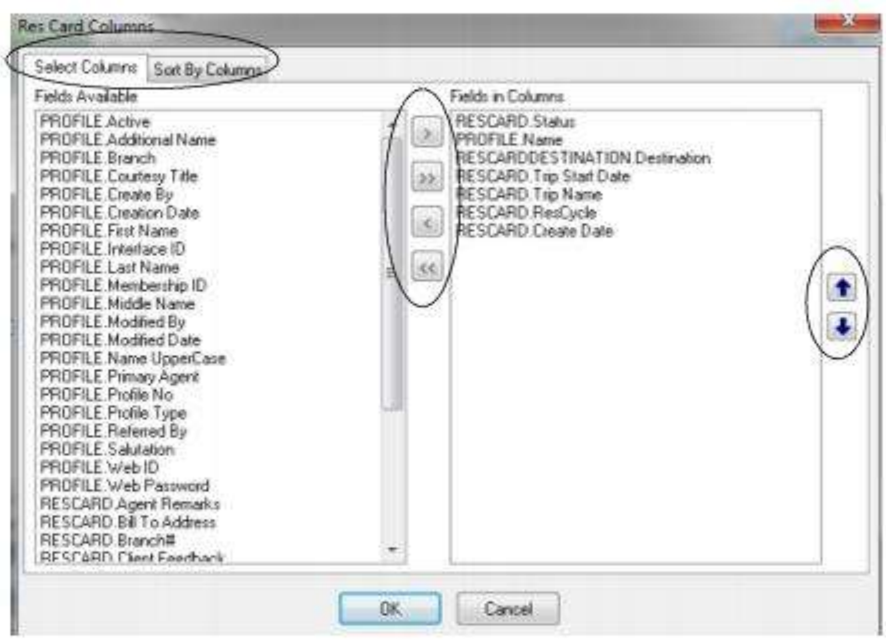
Saving Queries for Easy Access

As you can see, queries run in the ResCard Manager can become quite complex. With all the available filters in Level 1, Level 2, and Level 3, you can view your database inside out, upside down or in just about any subset. With this in mind, if there are certain queries that you want to run often, we suggest saving the Query filters after setting them up, by saving the Query to a folder. The next time you want to run a Query that you have already set up, click the saved folder. One click and your Query filters are completed automatically. What a time saver!

STEPS FOR SAVING A RES CARD QUERY

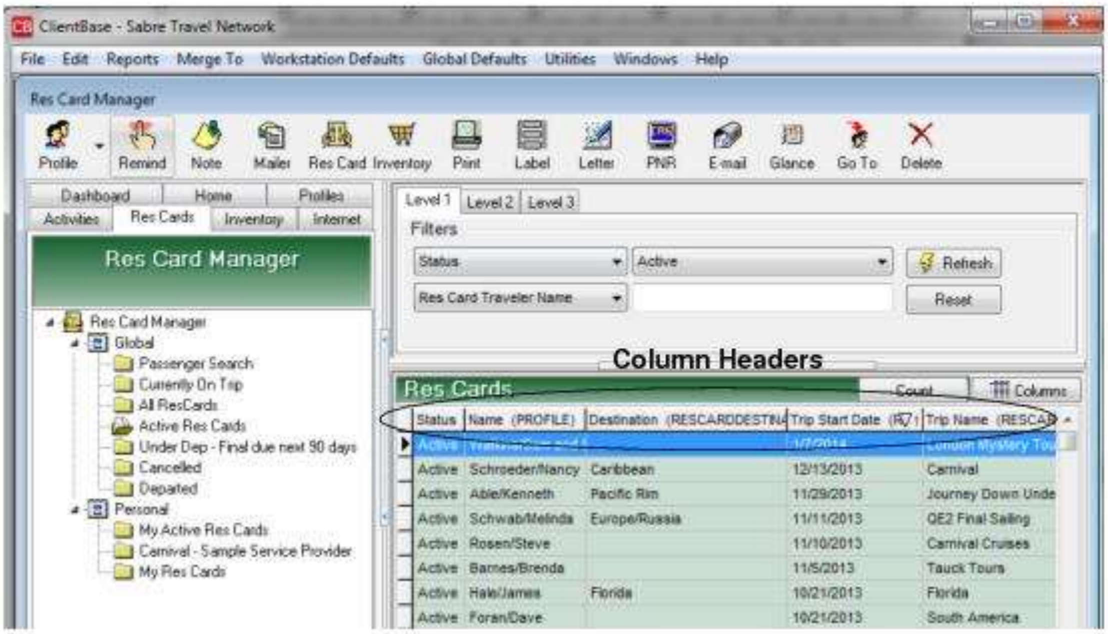
1) Using Level 1, 2, or 3 filter parameters in the Res Card Manager, enter your Query filters and run your Query.

2) To customize the columns used in the Query, click *Columns* on the Res Card Manager 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 and use the **>** or **<** arrows. By using the control key and your mouse, you can select non-consecutive entries to move. Use **U** and **D** to order your selections. To sort up to 3 columns in ascending or descending order, click the tab folders named, *Sort by Columns.*

You can also arrange and size the columns in your query. Do this by inserting the mouse between the column headers (see a bi-directional arrow), holding down the left mouse button, and pulling the columns to the new size.



To relocate a column, hold the mouse over the column in the column header to move (see a vertical line extending down). Press the left mouse button and pull the column left or right to its new location. To "quick" sort results differently, hold down the shift key and click the column header you want the results sorted by. A triangle appearing in the up position signifies the results are currently sorted in ascending order, and a triangle in the down position signifies the results are sorted in descending order.

3) When satisfied with the query results, go to **File|Save Query As**. This screen appears:

4) From the drop-down level menu, select *Personal* (for your own use only), or *Global* (for the use of everyone in the Agency).

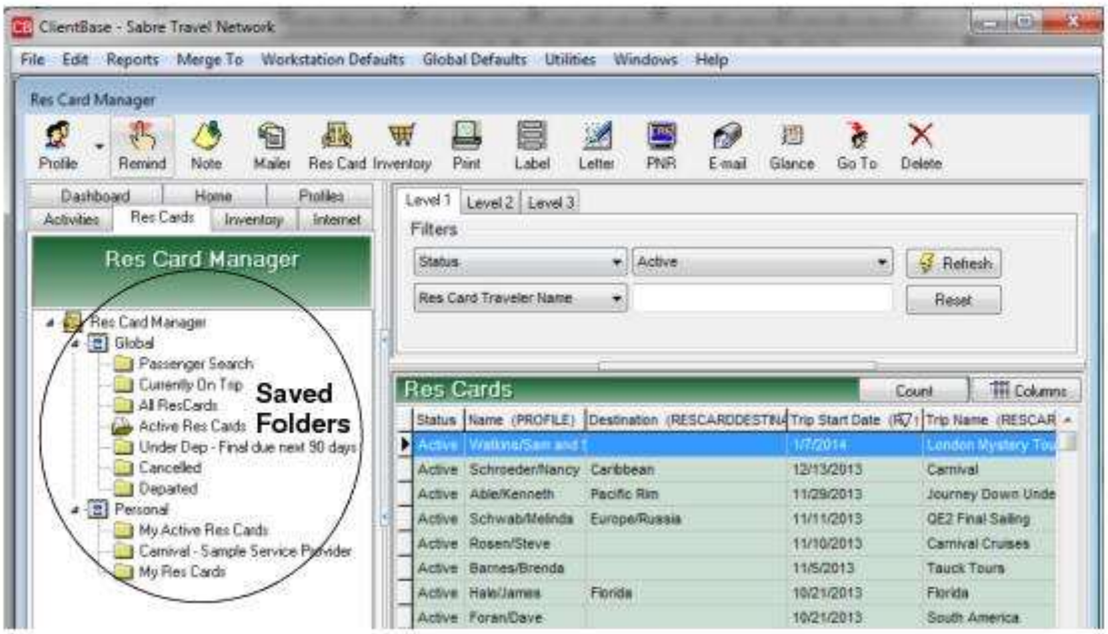
5) Name the query, to recognize it the next time it's needed.

6) Click *OK* to save and see the new query folder located on the left hand side of the Res Card Manager screen.

Note: *ClientBase* saves the selected filters and results layout, **not** the query results. The next time a saved query is used, any new data that has been added since it was created, is included in the new query.

Working with Query Results

Our most productive agent, Sharon, begins each day by accessing her to-do list. Immediately after working that list, she clicks on the Res Card Manager tab and selects *Sharon's Active Res Card* folder to review any pending reservations. The results screen immediately displays an organized list for her to review and take any action necessary. In addition to the active Res Cards, Sharon also created folders with saved sets of query filters labeled *Leads, Booked* and *Under Deposit* based on the reservation cycle fields. Having her Res Cards organized in this way helps her move closer to a goal of closing every travel inquiry that comes her way.



An agent can view the Res Card and its details by double-clicking on it. Toggling from each Res Card to the profile and back is simple and quick. From the profile, access phone information, as well as, other key data that add a personal touch necessary for effective customer service. Click the Res Card or activities tab of the profile to refresh your memory on previous contacts with the client.

Add, view, or delete a Res Card from this area of the profile. Add a new Res Card by clicking *Add*; modify or enhance a existing Res Card (perhaps add a reservation to a trip) clicking *Modify;* and click *Delete* to remove a Res Card.

How to Multi-Select Records

To multi-select records from the results of a Query, use the CTRL key in combination with a mouse click. Notice one of three symbols next to each profile:

a) **Bullet** - This profile has been selected.

b) **Bullet and Bracket** - This profile has been selected and is the current profile record the cursor is focused.

c) **Solid Triangle** - This profile has NOT been selected as part of the multi-select, but is the current record the cursor is focused on. CTRL-click once to get the bullet and bracket, and a second time to NOT include in the multi-select.

Use the main edit menu or right-mouse click results screen to *Select All*, *Unselect All* or *Inverse* the selection.

Note: To delete multiple Res Cards, use the multi-select feature, and click *Delete*. This permanently deletes these highlighted records all at one time.

Chapter 16: Creating and Using Inventory

This section details creating a database of inventory and integrating items into Res Cards for easy entry with inventory control. It also demonstrates the use of the Inventory Manager to easily organize and manage inventory records.

Introduction

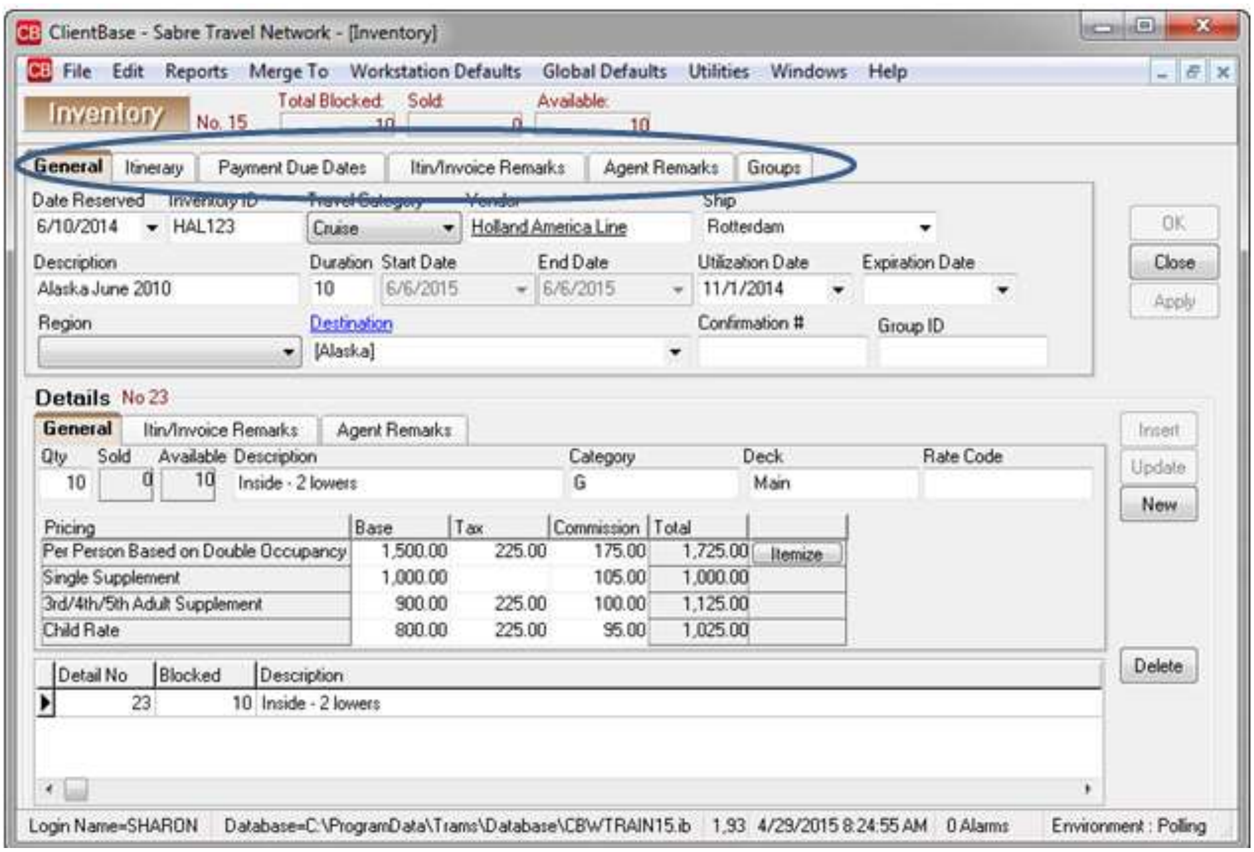
In *ClientBase* create inventory items for block space and integrate them into the reservation area of Res Cards. The process is an easy one. Block space inventory records can be created for air, cruise, hotel, rail, tour, and miscellaneous reservations. Enter each inventory item one time, with details of the pricing, itinerary, deposit and payment due dates, as well as invoice/itinerary remarks. Next, create a reservation and pull from the list of created inventory records. All *Inventory Details* automatically drop into the reservation and create a link to the inventory record; therefore tracking what inventory has been taken and what is left. What a great way to manage block space and what a time saver! No more manually tracking inventory using paper controls or supplemental spreadsheet or database programs.

Creating a Database of Inventory

From anywhere in the program, create inventory items by clicking the *Inventory* icon on the toolbar, or going to **File|New|Inventory**. You can also create inventory by right-mouse clicking in the results screen of the Inventory Manager.

An inventory record is made up of header information, which includes constant information such as vendor, service provider, itinerary, and dates of travel. In addition to the header information, an inventory record also includes *Inventory Details*. One inventory record can include multiple inventory details. *Inventory Details* include quantity, description and pricing. For example, if you have blocked space for 2 different categories of cabins on an October sailing of Carnival's Ecstasy, enter one inventory record with 2 inventory details, one for each cabin category with the quantity blocked and its pricing.

GENERAL TAB (Top)



Depending on the travel category selected, different tabs of information appear with different fields of information within those tabs. The current travel categories available for inventory entry are Air, Cruise, Hotel, Rail, Tour and Miscellaneous. The variation in tabs and fields based on the travel category parallel the variations included by travel category within the Res Card reservation records.

Date Reserved: Manually enter or choose date from the drop-down menu. This is the date this block space is reserved.

Inventory ID: This unique ID is user definable and can be used to Query inventory items. For example, an Ensenada Cruise ID might read, CR063008 (using CR for cruise and the date).

Travel Category: From the drop-down menu, select the appropriate travel category from *Air, Cruise, Hotel, Miscellaneous, Rail* or *Tour.*

Vendor: Type in a few letters of the vendor's name and choose vendor from drop-down menu.

Airline/Ship/Property/Rail/Service Provider: Depending on the travel type, fill in the service provider profile that applies. For example, if the vendor is Carnival Cruise Lines, the service provider might be *Ecstasy* or *Jubilation.* If you do not have a service provider profiles created, simply type in the service provider. That way you can still Query for that service provider or obtain service provider reports.

Description: Type in a unique description to identify this inventory item. For example, an Ensenada Cruise description might read Ensenada Cruise 06/30/08 (name of cruise location and date). For Air and Rail, the description field is in the Fight Details/Train Details tab. These description fields are populated when pulling from inventory if the this field is completed within the inventory record and is printed on Invoices and Itineraries.

Duration: Type the number of days of the item.

Start Date: Type the start date of the item or double-click the start date off the calendar accessible from the drop-down menu.

End Date: Type the end date of the item or double-click end date off the calendar accessible from the drop-down menu.

Utilization Date: Enter a date which can be queried and store review dates, release space dates, or any dates of your choosing. Dates can be changed throughout the sales process.

Expiration Date: Enter date when this item can no longer be used, or double-click the utilization date off the calendar accessible from the drop-down menu. This is **important** because by entering an expiration date, agents are prevented from pulling inventory into Res Cards after this date, and *ClientBase* automatically removes all expired inventory from any Query results when launched from the Res Card Inventory button. You can still Query expired inventory from your Inventory Manager, as the record still remains in the database. (If an inventory record has the *Expiration Date* set to today, the inventory continues to appear in Query results and is not considered expired until the day after the expiration date.)

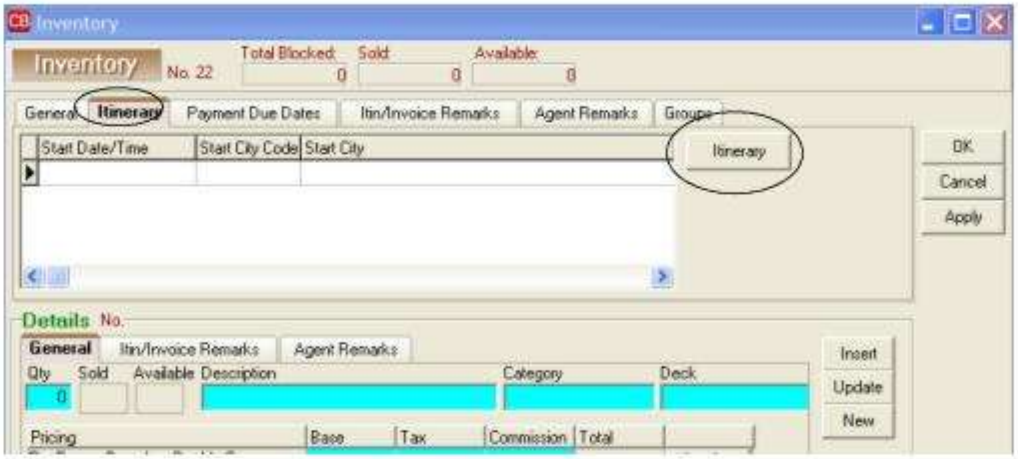
Region: This area includes a hard-coded set of regions and is populated by selecting from a drop- down listing.

Destination: Enter the region/destination of the trip from a detailed list in the drop-down menu. These entries are user-definable under **Global Defaults|General Setup|User Defined Fields|Res Cards**: **Region of Trip**, or by clicking on the blue field label if permitted. The user definable Destinations also include the ability to be linked to one of the hard coded Regions. Upon creating inventory, if the Region field is completed first then upon selecting a Destination the drop-down listing will only include a subset of those Destinations linked to that Region. If *Allow Freeflow* is not checked (forcing the users to select from the drop down listing) then multiple Destinations can selected and inserted into one Res Card.

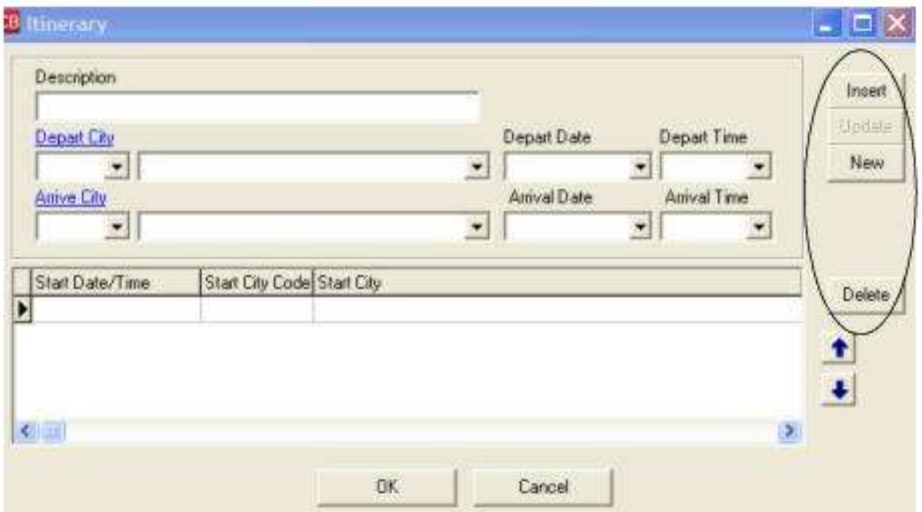
Confirmation #: Enter a confirmation number.

Group ID: Track details of group cruise contracts.Added the ability to associate Group IDs with a Group Name. If a user adds a Group Name and a Group ID to the same Inventory record, the Group ID and Group Name are now associated. When an Inventory Group is viewed from the Group List, any associated Group IDs are listed under *Linked Inventory Group IDs*. (This field only displays if there are Group IDs linked.)

ITINERARY TAB (TOP)

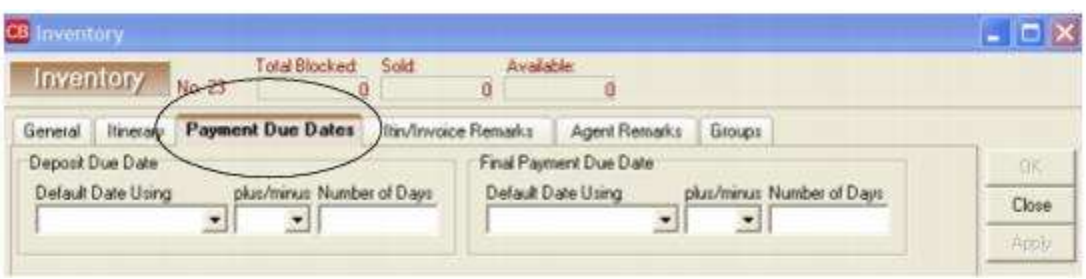


Some agencies want detailed information to print on itineraries/invoices generated from Res Cards. To enter specific itinerary information, click the *Itinerary Tab* and then the *Itinerary* button and complete all desired fields:



Click *Insert* to add information to data entry screen below. To add an additional item, click *New.* To edit an item, select it, change the data, and click *Update*. To remove an item, select it, and click *Delete.*

PAYMENT DUE DATES TAB (TOP)



***Deposit Due Date*:** From the drop-down menu next to *Default Date Using*, select *Current Date, Reservation Create Date, Reservation Start Date,* or *Reservation End Date.* Next, from the drop-down menu select the plus or minus sign and choose the number of days from 1 to 2000 to use in combination with the *Default Date Using* field. This date automatically appears in the Profile|Res Card Activity tab and when that date comes up, on user's to-do list.

***Final Deposit Due Date*:** From the drop-down menu next to *Default Date Using*, select *Current Date, Reservation Create Date, Reservation Start Date,* or *Reservation End Date.* Next, from the drop-down menu, select the plus or minus sign and choose the number of days from 1 to 2000 to use in combination with the *Default Date Using* field. This date automatically appears in the Profile|Res Card Activity tab and when that date comes up, on user's to-do list. (Want to print a final payment report? This is the field that report picks up.)

ITIN/INVOICE REMARKS TAB (TOP)

Enter free-flowing remarks that appear on the generated itinerary and invoice.

AGENT REMARKS TAB (TOP)

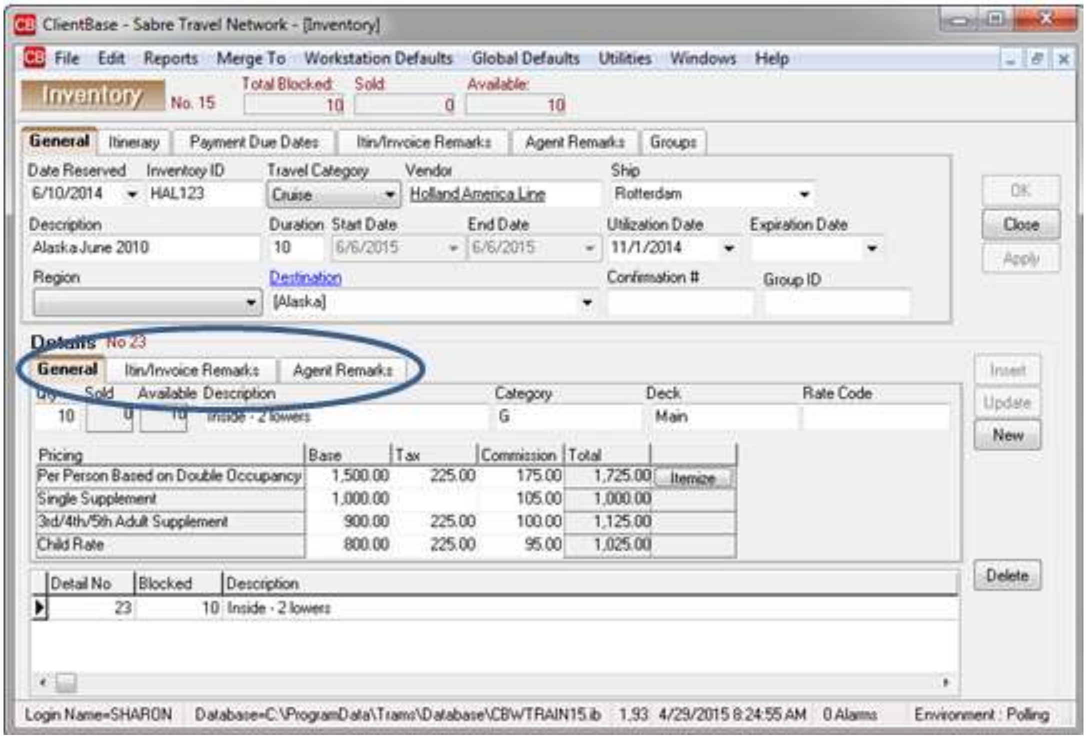
Enter free-flowing remarks that do not appear on the generated itinerary and invoice. Use this like you use your notepad right now - put all your notes here that become part of the record.

GROUPS (TOP)

Associate multiple group names to one inventory. This feature combined with the ability to pull multiple inventory records at once (see below) allows you to batch separate inventory records together and therefore ease the process of selling and pulling inventory that are all associated but include multiple components or vendors.

Also note that when pulling from inventory from within a Res Card, if the group field is completed at the Res Card level, upon clicking the inventory feature the system will automatically filter the inventory for that selected group and display inventory results accordingly.

GENERAL TAB (Bottom)



Enter the quantity blocked along with a brief description and the *Category/Deck, Room Type, Class of Service* or *Tour Name*. Air, rail and miscellaneous travel categories prompt for unit pricing, while cruise, hotel and tour travel categories prompt for per person pricing based on double occupancy. Any pricing entered into the inventory detail is then used to create the default pricing when an agent pulls from inventory while working in the Res Card reservation area.

The more complete pricing information within the inventory detail, the more accurate the default pricing is when your agents are pulling from this inventory record. For example, if no child pricing has been entered, rather then leave it blank, enter the full adult pricing in case a one of your travelers is a child who is included when pulling from Inventory. **(**When selecting travelers, be sure to include the type of traveler, *Adult, Child, Infant* from the drop-down menu.)

For enhanced pricing information on clients' invoices, itemization can also be captured within your inventory detail's pricing area.

Qty: For this inventory record, type in the number of available items. (When you no longer have block space to offer, make sure to come back here and change the quantity to the number you have already sold. That way you won't accidently sell inventory that is no longer available for sale.)

Sold/Available: This area keeps track of what has been sold and what is still available. After an inventory item has been used, totals are updated here to reflect changes in inventory.

Description: Type in any identifying description of this record. It may be the same as the description entry in section above.

Class of Service/Category-Deck/Room Type/Tour Name: Depending on the travel category selected in section above, fill in the appropriate data.

Rate Code: Track details of a group cruise contract.

Pricing/Base/Tax/Commission: For each item, fill in the Base Price, Tax, and Commission on *Per Person Based on Double Occupancy, Single Supplement, 3rd/4th/5th Adult Supplement,* or *Child Rate.* Click *Insert* to add information to data entry screen below. To add an additional item, click *New.* To edit an item, select it, change the data, and click *Update*. To remove an item, select it, and click *Delete.*

Itemize: Click the *Itemize* tab to bring up a screen to itemize the total fare if you want more detail to print on the itinerary/invoices generated in the Res Card.

ITIN/INVOICE REMARKS TAB (BOTTOM)

Enter free-flowing remarks that appear on the generated itinerary and invoice.

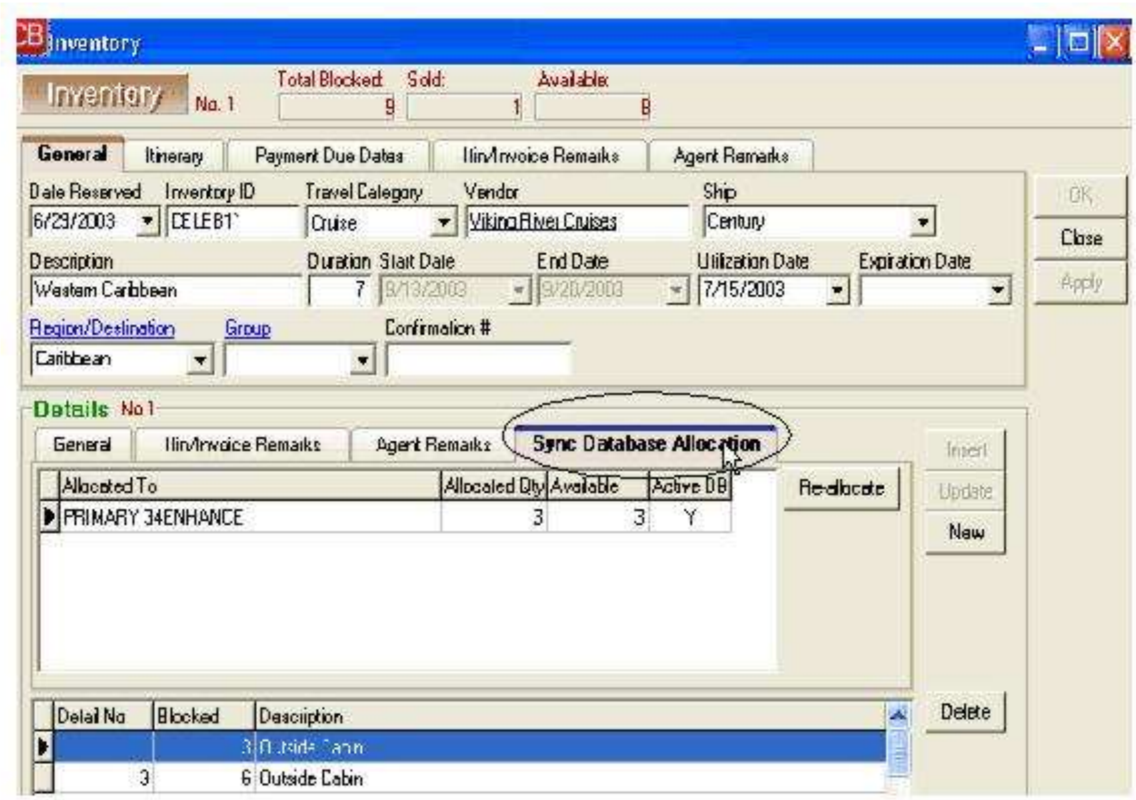
AGENT REMARKS TAB (BOTTOM)

Enter free-flowing remarks that do not appear on the generated itinerary and invoice.

Note: See below for steps on copying inventory items!

Allocating Inventory Across Sync Primary and Sync Copy Databases

In the past, agencies that have been synchronizing with another location were limited to creating and pulling from inventory in only the Primary location. The reason for this limitation was because of the potential to oversell inventory between synchronization processes. To overcome this danger, *ClientBase* has the ability to allocate available inventory across your various sync databases. Sync activated databases have an additional entry tab in *Inventory Details*, called *Sync Database Allocation.*



Upon creating new Inventory (or updating existing Inventory), look at the count within the *Available Inventory* field. Determine if this inventory should be re-allocated to other sync locations (databases) to facilitate better sales of this inventory. Click the *Sync Database Allocation* tab and *Re-allocate* to re-allocate any quantity available from your current database to any other Sync Copy database.

The system allocates the inventory to the database the user is connected to. When an agent *Pulls From Inventory,* they are only able to pull inventory allocated to the database they are connected to. As agents use the inventory feature within the Res Card, if they determine that they have a client interested in inventory that is no longer available, they click the *View Inventory Record* and the *Sync Database Allocation* tab to see if there is available inventory in other locations (databases). If so they may suggest re-allocated some of that available inventory to locations (databases) that no longer have any available to them. To re-allocate inventory from one location (database) to another, you must connect to the database that has the available inventory. You can only re-allocate inventory from the database you are connecting to and you can only re-allocate inventory of the database has available inventory records to re-allocate.

Important Note for Agencies Syncing to CBB Hosted: If you are synchronizing to the Hosted *ClientBase* Browser application, **DO NOT** allocate inventory to that database unless you are OK with not being able re-allocate it back out of CBB Hosted! *ClientBase* Browser does not yet include the Inventory Manager and therefore does not have the ability to re-allocate its unused available inventory back to other databases. This means any inventory allocated to CBB Hosted, will have to be sold via CBB Hosted.

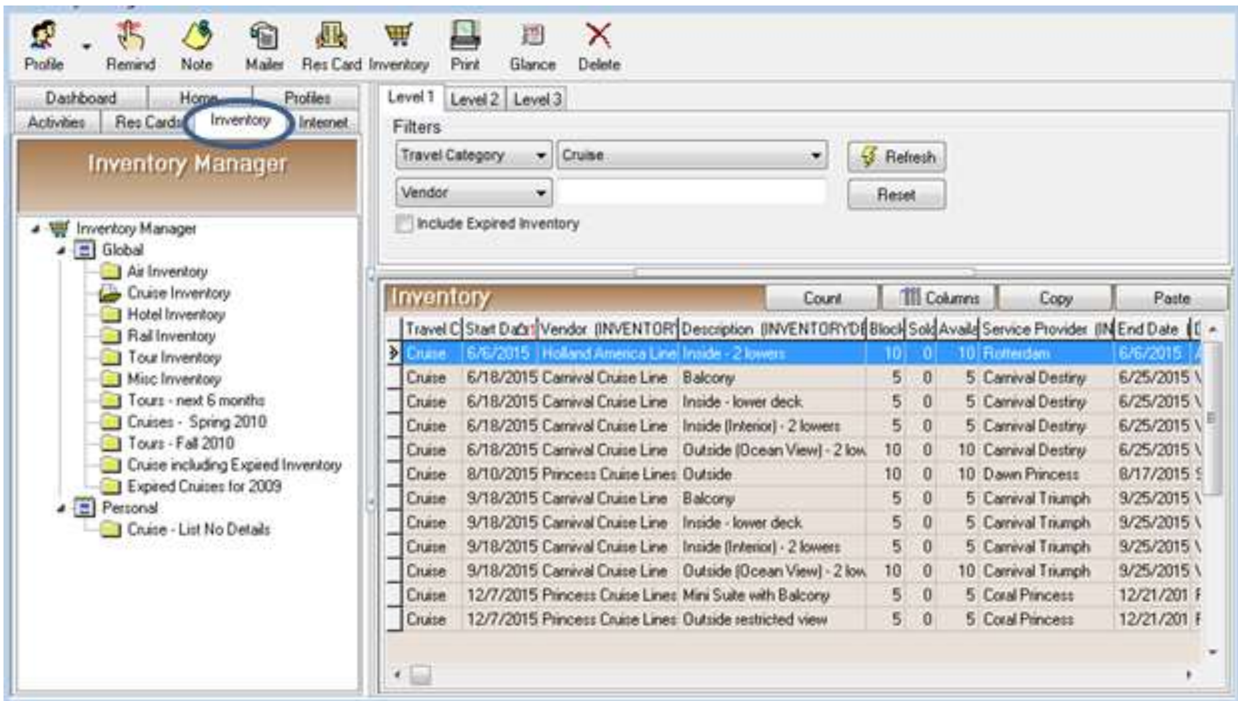
When pulling from Inventory, the system defaults using one of two *Default Inventory Filters*:

1) **Reservation Travel Category** - this prompts the Query window with the Travel Category field defaulted to the same category selected in the Reservation.

2) **Res Card Group Name** - this now skips the Query window and directly prompts results of ALL inventories (if any) that matches Group Name in the ResCard. You must click *Query* button to change drop-down field default back to *Reservation Travel Category*.

Using the Inventory Manager

The Inventory Manager provides tools to manage the database of inventory records. Use the Level 1, 2 and Level 3 Query filters to query the database of inventory records. From the query results *Add, Modify* and *Delete* inventory records. When opening the Inventory Manager, by default no Query filters are entered, therefore, all active inventory items in the database appear in the query results screen. Each line represents one inventory record which in turn represents one block space. To filter the database results, either click the folder containing a stored set of query fields or use Level 1 or Level 2 Query fields to filter the database and enter a custom query. Clicking the Inventory Manager tab brings up the following screen.



A list of Query folders is located to the left of the Inventory Manager. The global folders are accessible to anyone for general viewing. They include some default folders which include *Air Inventory, Cruise Inventory, Hotel Inventory, Rail Inventory, Tour Inventory,* or *Misc. Inventory.* Create any folders with a customized set of Query filters (see section below *Saving Queries for Easy Access*). Personal folders contain saved queries created by users and customized for their own particular user login. By clicking any of these folders, view the completed filters used for this stored query, and a listing on the results screen of all inventory items meeting the criteria of the selected query filters. By right-mouse clicking in the results screen, you are presented with the following options:

Add - Add a new inventory item.

Modify - Modify the selected inventory item in the results screen.

Delete - Delete the inventory item/s selected in the results screen (to select multiple items, hold down the Ctrl key and pick).

Refresh - Refresh the Query (search) if you have just made a change.

Invert All - Before running reports, for example, hold down the Ctrl key for those items you do not want to include and *Invert All.* It will launch the report for every one BUT the one/s you selected.

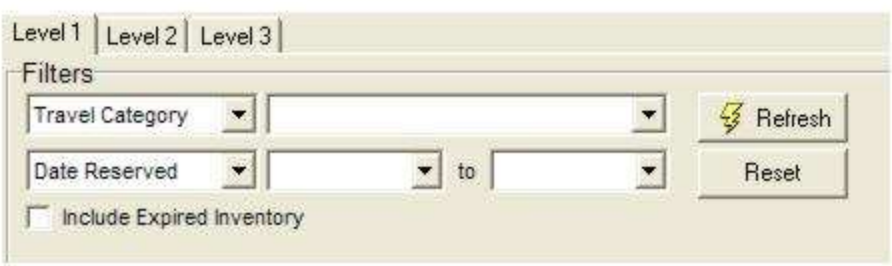
Select All - Selects everything in the results screen.

Unselect All - Unselects everything in the results screen.

Columns - Allows you to customize the columns and sorts in the results screen.

Level 1 Inventory Manager Query

The Level 1 Inventory Manager Query allows you to quickly locate an inventory item or a group of inventory items by simply completing one or two Level 1 Query filters.



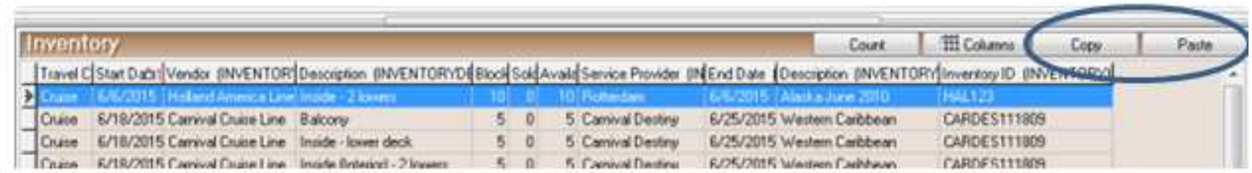
The drop-down menu fields identify what to search *by* and are completed by selecting from the following: *Travel Category, Date Reserved, Vendor, Service Provider, Inventory ID, Description, Duration, Start Date, End Date, Utilization Date, Region,* or *Group.*

Include Expired Inventory: By default this checkbox is not checked both in Level 1 and Level 2 Query. This means that by default all Inventory queries no longer include expired inventory from the results unless you place a check in this box.

The blank field allows you to make your selection from a default pull-down list or type in free-flow information if there is no pull-down list. To prevent spelling errors, it is suggested that you type no more than 3 or 4 characters in the free-flow fields. An arrow to the right of the blank field indicates a list from a pull-down menu exists for ease of selection for that Query filter. If both fields are used in the Query, then the results match both (all) criteria, not either/or (any) criteria. This means the Query filters are strung together with an "and" not an "or." (Another way of saying this is that **All** fields are evaluated to form the results of the Query, instead of **Any** filter selected within one field being evaluated to form the results of the Query.) After completing or changing data in the filters, the system automatically sifts through the database and displays the matching inventory items in the Query results screen.

For example, if agent Sharon wants to review all her active inventory cruise items created on June 23, 2008 in the system, she sets the first field to *Travel Type* and selects *Cruise* from the pull-down menu list. She sets the second field to *Date Reserved* and June 23, 2008 from the pull-down calendar, or simply free flows the date 0623 (no need to put in the year as it populates with current year), and tab. Finally, she clicks *Refresh* to see a list that matches her selection criteria.

Copy/Paste Inventory Records

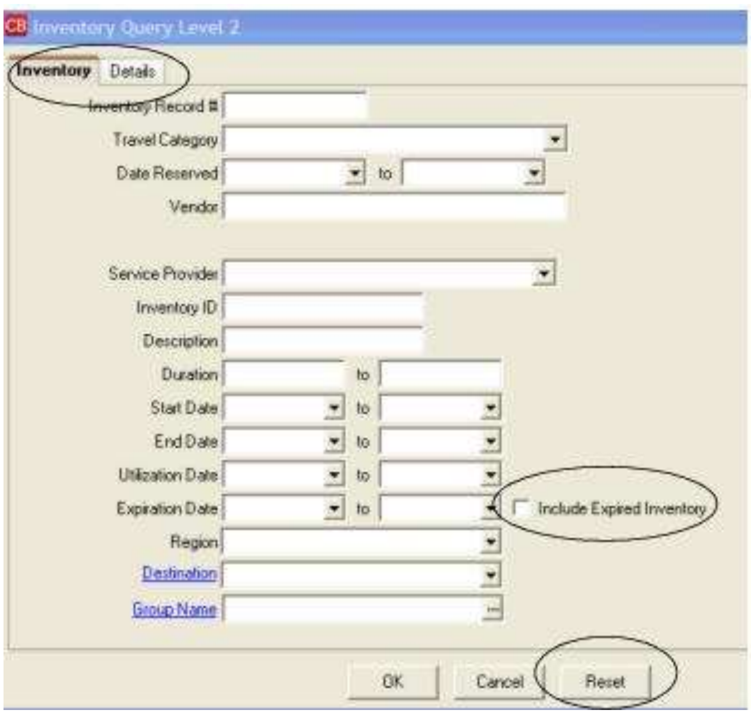


To help make entering repetitive inventory easier, copy and paste an Inventory record. From either the Level 1, 2 or Level 3 Query results you can now copy any inventory record by highlighting it and clicking *Copy*. Click *Paste* to automatically create a new Inventory record with all of the copied inventory details defaulting. All inventory fields are copies including all *General, Itinerary, Payment Due Dates, Itin/Invoice Remarks, Agent Remarks* in addition to each *inventory detail item*. The only fields that do not copy are the *Inventory Record Number* and the *Number Sold*.

Level 2 Inventory Manager Query

The Query Level 2 provides additional filters to more narrowly define a search. Search filters are selected by clicking *Filter,* and then completing as many of the search criteria fields as desired.

Since Level 2 Query "remembers" the last query run, click *Reset* to clear. Always do this first when doing a Level 2 Query, as there may be data remaining in the many search folders from the last search. Inventory folder tabs such as *Inventory, Itinerary, Flight Information, Address,* and *Details* are available for selection criteria entry. Query also across all tabs of information. Like Level 1 Query, the selection criteria entered within a tab or across tabs are strung together with "ands", so the resulting profiles must match **ALL not ANY** criteria.



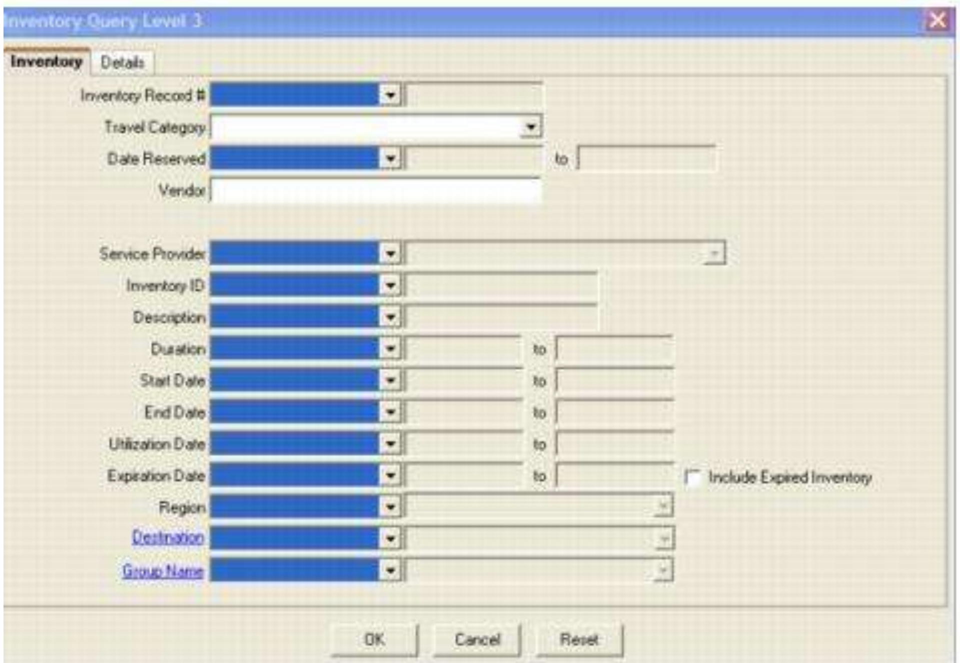
Include Expired Inventory: By default this checkbox is not checked both in Level 1, 2 and Level 3 Query. This means that by default all Inventory queries no longer include expired inventory from the results unless you place a check in this box. By clicking *OK*, the query is completed and a list of profiles matching the selection criteria appears on the results screen.

Level 3 Inventory Manager Query

The Level 3 Query provides users with an even greater ability to more narrowly define a search. As detailed above, Level 2 Query allows a search by any number of fields, stringing one statement of criteria together with an "and." Query Level 3 strings multiple statements of criteria together with an "or," using search method options to define how the criteria should filter. The Level 3 Query has a totally different look from Level 2 Query:

There are a set of buttons including *Add Filter, Modify Filter, Delete Filter, Reset All* (to clear out all filters currently displayed), and *Summarize*. Notice there is nothing to view in the results screen. This is because you need to setup the criteria statement(s) and click Refresh to see the Level 3 Query results.

To enter the search criteria into Level 3 Query after clicking *Reset All*, click Add Filter:



Activities folder tabs, *Inventory* and *Details* appear*.* What is unique about the Level 3 Query is that most of the available search fields are divided into two parts. Directly to the left of the field, is a box with a drop-down menu of search method options called, Operators, with which you can narrow down your search. Sample Operators include: *Is Equal to; Less than or Equal to; Greater than or Equal to; Less than, Greater than, Not Equal to; Starts With; Contains; Is BLANK;* **and** *Is NOT BLANK.* Search fields are strung together with an *And.* Use both tabs to setup the first filter or your query, and click *OK.* Click *Refresh* to see the results of your first filter.

To set up a second filter, click *Add.* Remember as you are setting up subsequent filters, there is an OR between all the filters you are stringing together.

Using Date Formulas in Queries

Since queries can be saved and retrieved for frequent use, the date fields in all queries allow for date formulas. This means any field that has a date, can also contain a formula for that date. The date formula function query creation without identifying a specific month, day and year in the *From* and *To* date fields. Instead, the query is processed with a formula for the month, day, day of the week, and year based upon the date the report is processed.

Remember: Make sure the system date and time are correct.

Benefit: When entering a date formula, the system converts it to the intended time period allowing you to run queries and/or save them for future use without the need to modify dates.

Example: The following tables contain sample formulas for specifying dates. Mix and match the absolute and relative parameters in the function. The first number specifies the day of the month, the second number specifies the month, and the third number specifies the year. So if you only have the first number filled in, this means you want this report to reoccur on this day every month in every year.

DATE FORMULAS:

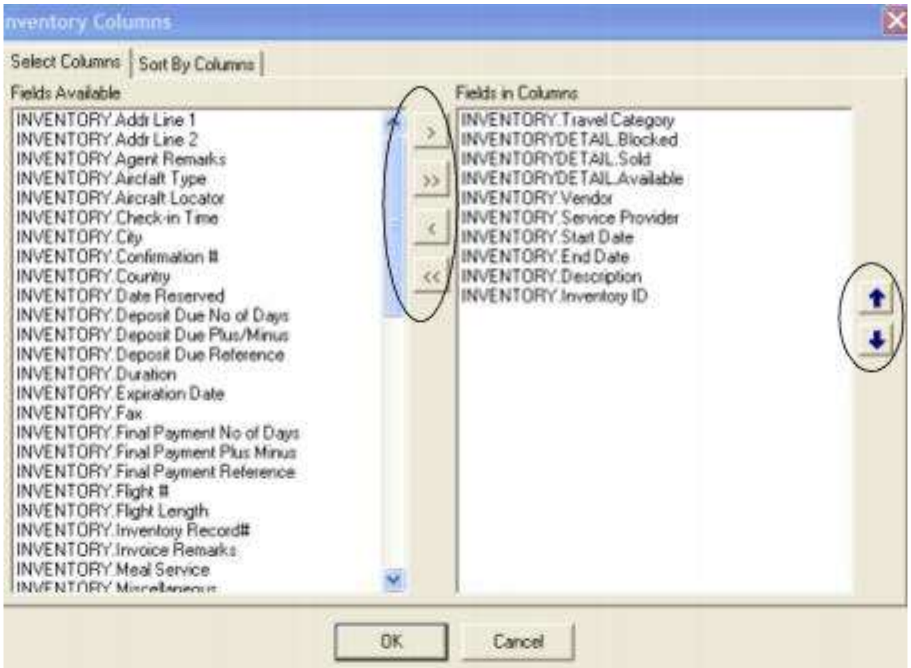
If You Want This	Enter This
1st day of this month:	=1,0,0
Last day of this month:	=31,0,0
1st day of this year:	=1,1,0
Last day of this year:	=31,12,0
Seven days from now:	=+7,0,0
Last Monday (will show today if today is Monday)	=Mon
A week from last Monday	=Mon-1
Next Monday	=Mon+1
Three months from now	=0,+3,0
Six months ago:	=0,-6,0
One year from now	=0,0,+1

Saving Queries for Easy Access

As you can see, queries run in the Inventory Manager can become quite complex. With all the available filters in Level 1, 2 and Level 3, you can view your database inside out, upside down or in just about any subset you desire. With this in mind, if there are certain queries that to run often, save the query filters after setting them up, by saving the query to a folder. That way, the next time you want to run a query that you have already setup, click the saved folder. One click and query filters are completed automatically. Following are the steps for saving an inventory query:

1) Using Level 1, 2 and Level 3 filter parameters in the Inventory Manager, enter query filters and run the query.

2) To customize the columns used in the query, click *Columns* on the Inventory Manager results screen.

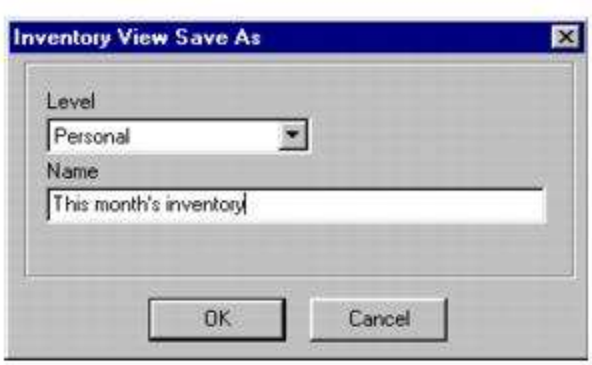


To change a column, move the highlighted column over to the other side by using the **>** or **<** arrow. By using the shift key and mouse, select as many consecutive entries as you want to move and use the **>** or **<** arrows. By using the control key and your mouse, select non-consecutive entries to move. Use **U** and **D** to order your selections. To sort up to 3 columns in ascending or descending order, click the tab folders named, *Sort by Columns.*

You can also arrange and size the columns in your query. Do this by inserting your mouse between the column headers (see a bi-directional arrow), holding down the left mouse button, and pulling the columns to the new size.

If you want to relocate a column, hold the mouse over the column in the column header you want to move (see a vertical line extending down). Holding down the left mouse button, pull the column left or right to its new location. To "quick" sort results differently, **hold down the shift key and click the column header you would like the results sorted by**. A triangle appears in the up position within the field header that signifies the results are currently sorted in ascending order. A triangle in the down position signifies the results are sorted in descending order.

3) When satisfied with the Query results, go to **File|Save Query As**. This screen appears:



4) From the drop-down level menu, choose whether to save the query as *Personal* (for your own use only), or *Global* (for the use of everyone in the agency).

5) Name the query to easily recognize it the next time it is needed.

6) Click *OK* to save and see the new query folder located on the left hand side of the Inventory Manager screen:

Note: *ClientBase* saves the filters and results layout, **not** the query results. The next time you use the saved query, any data that has been added or modified since it was created, is included in the new query.

Working with Query Results

Agents can query for any particular inventory items, select columns and sorts accordingly, and print out the results, by clicking the *Print* icon In the toolbar.

To add new inventory records, click *Inventory* on the main toolbar, right-click anywhere within the query results and select *Add*, or go to **File|New|Inventory**. To modify an existing inventory record, use the Level 1, 2 or 3 Query filters (see below) to locate the desired inventory record. Either double-click the inventory record from the query results listing, or highlight the desired inventory record, and then right-click anywhere within the query results and select *Modify*.

To remove an inventory record, use the Level 1, 2, or 3 Query filters to locate the desired inventory record. Highlight the inventory item to delete and either click *Delete* icon on the toolbar, or right click anywhere within the query results and select *Delete*. You are prompted for confirmation since if there are any reservations linked to the inventory record, the system does not allow deletion.

Special Note: The delete inventory feature removes the entire inventory record along with ALL inventory details. To delete a specific inventory detail, do NOT delete from the results of the Inventory Manager Query. Retrieve the desired inventory record and from within that record, highlight the inventory detail to remove, and click *Delete*.

How to Multi-Select Records

To multi-select records from the results of a query, use the CTRL key in combination with a mouse click. Notice one of three symbols next to each profile as you push CTRL and click it:

a) Bullet - this profile has been selected.

b) Bullet and Bracket - this profile has been selected and is the current profile record the cursor is focused on.

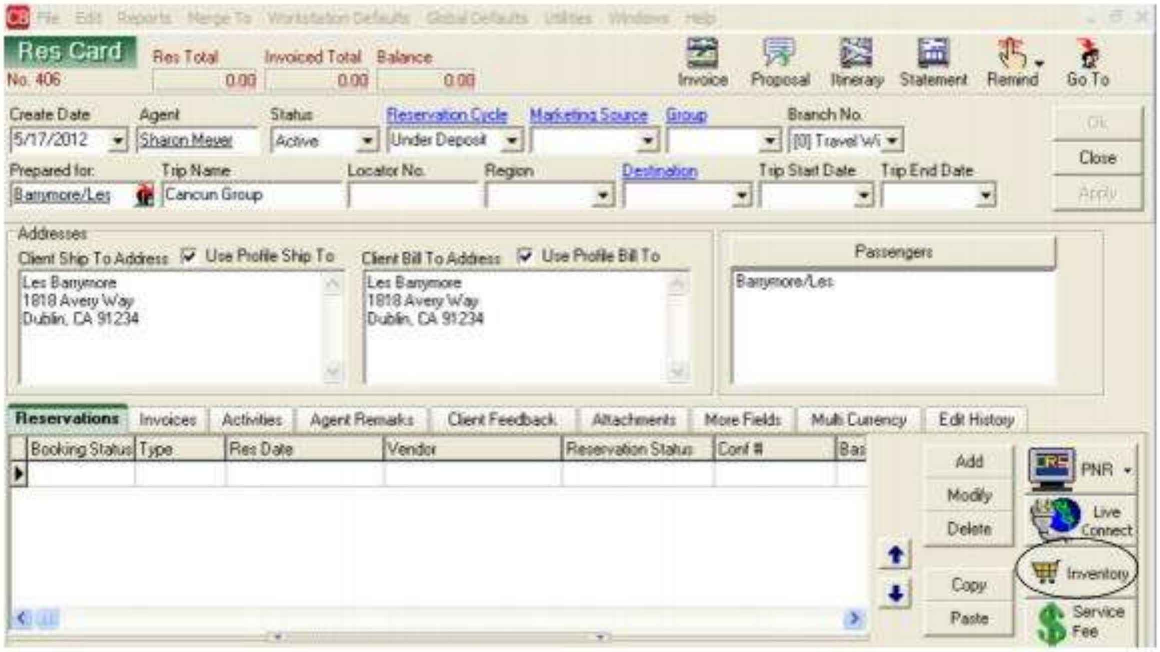
c) Solid Triangle - this profile has NOT been selected as part of the multi-select, but is the current record the cursor is focused on. CTRL-click once to get the bullet and bracket, and a second time if you choose not to include in the multi-select after all.

Also use the main edit menu or right-mouse click the results screen to *Select All*, *Unselect All* or *Inverse*.

To delete multiple inventory records, use the multi-select feature, and click *Delete* on the toolbar. This permanently deletes these highlighted records at one time. If there are reservations linked to the inventory record you are trying to delete, the system does not permit deletion. The delete inventory feature removes the entire inventory record along with ALL inventory details. To delete a specific inventory detail, do NOT delete from the results of the Inventory Manager Query. Retrieve the desired inventory record and from within that record, highlight the inventory detail to remove, and click *Delete*.

Selling Inventory

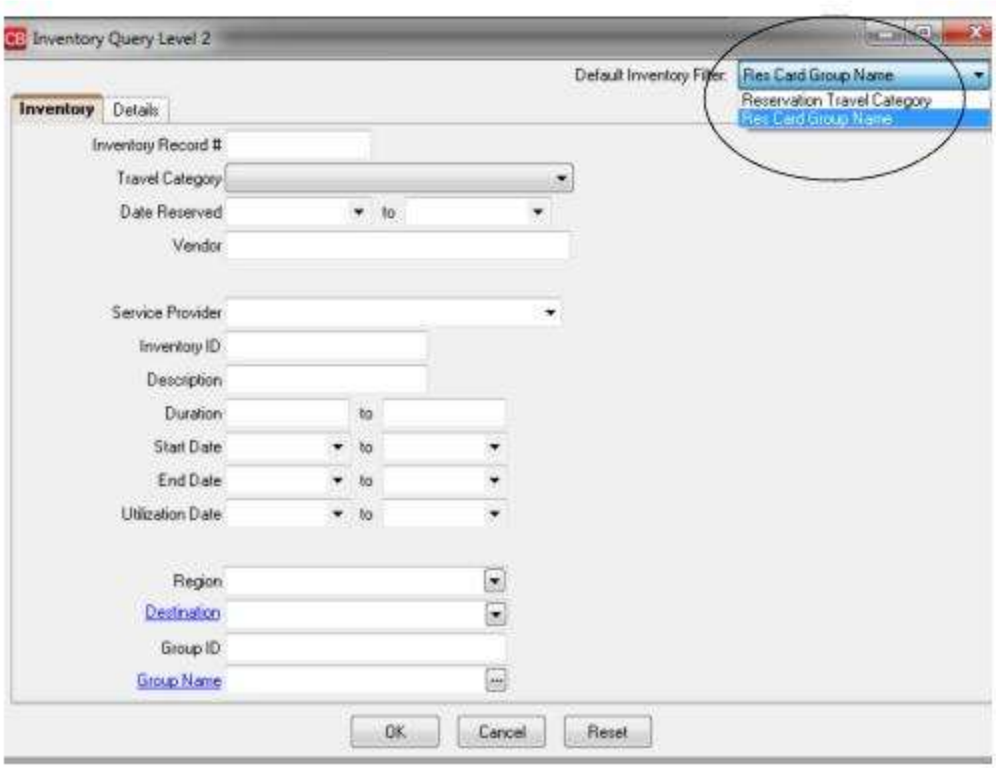
Once a database of inventory records has been setup, agents can connect to this database of inventory while working in the Res Card. To query inventory for a particular client's trip, open a Res Card for that client and select the travelers. Click the *Inventory* icon.



Upon clicking the Inventory button from the Res Card level, the system either provides you with the ability to query for your desired inventory (see below), or, if a Group has been captured within the Res Card, the query may be performed automatically if you have the *Default Inventory Filter* set to *Res Card Group Name.*

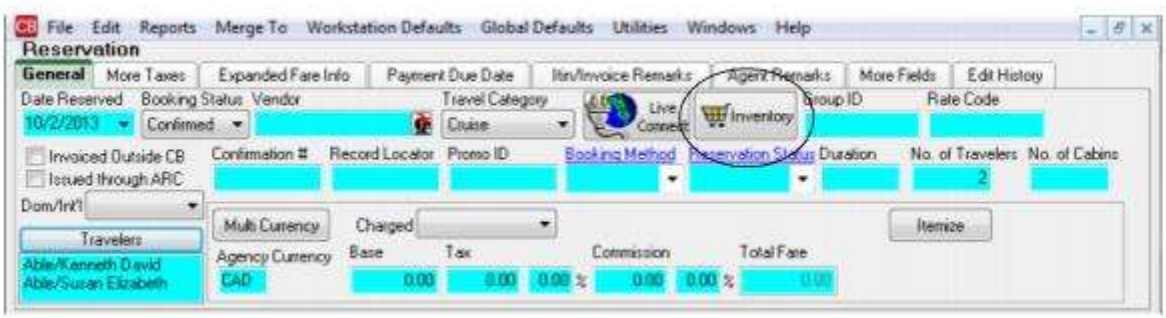
If you need to search for Inventory, use any inventory header fields as filters (search criteria), as well as itinerary/flight/address info and inventory detail information. Each filter entered into the query fields is "anded" together with other filters, so any results match all filters. The more filters entered, the narrower the search and generally fewer results. The fewer filters entered, the more general the search and generally more results.

The *Default Inventory Filter* that you can use *to* pick from two possible default filters when pulling from inventory has the options, *Reservation Travel Category* and *Res Card Group Name*. This is a "sticky" setting so that each time you pull from inventory the system remembers the last setting and defaults accordingly.



Enter the criteria you know about your client's trip needs and click *OK* to view a listing of the inventory that matches the search criteria. Use any of the tabs available to search.

You can also pull inventory from inside a reservation, but make sure the travelers are correct before you pull (check off those who are going to be in the reservation, and uncheck any traveler that is not going to be in that reservation) and then click *Inventory*:



A Level 2 Inventory query screen as outlined above appears to query inventory items based upon the travel needs of the client.

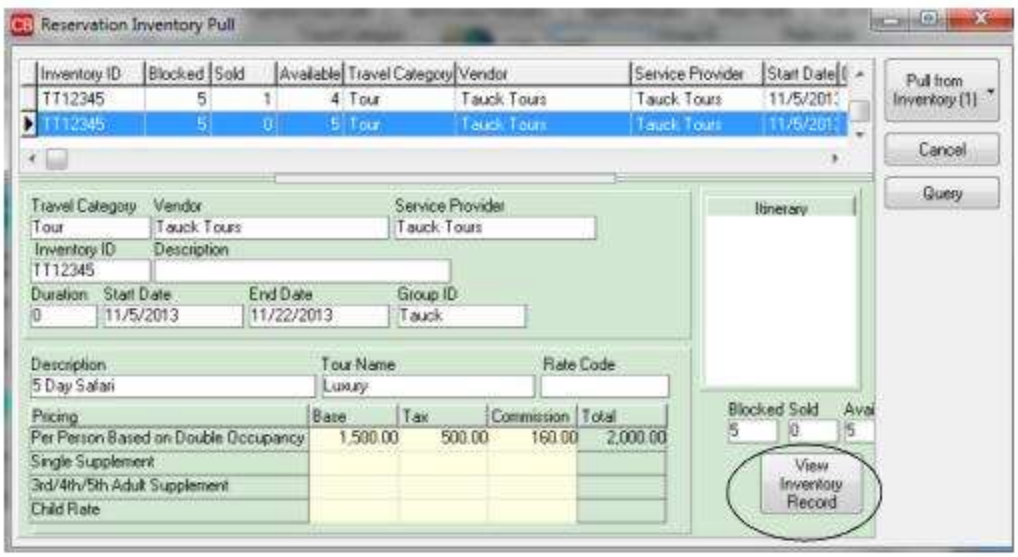
Pulling From Inventory

Once your Inventory query criteria has been captured, the system prompts with matching Inventory details and from this results screen, the system now allows you to select any number of Inventory details by placing an **X** in the box within the column labeled *Pull from Inventory*.

The *Pull from Inventory* drop-down has two options: *Pull from Inventory and Import to Reservation*, and *Pull From Inventory and Launch Live Connect.*

The second option is currently only available for Sabre Cruises. If the inventory vendor is not configured for Sabre Cruises, this option is disabled and displays the hint *Inventory Vendor is not assigned to Sabre Cruises*. (See details on using this option below.)

As you select each Inventory detail desired, the *Pull From Inventory* button's count is increased accordingly. To view more information about any inventory detail, click *View Inventory Record* at the bottom right hand corner. Once all desired Inventory is selected, click *Pull From Inventory*, and the system imports each inventory detail into a separate reservation record and the available inventory is decreased accordingly. Please note that although the system allows for pulling more than one inventory detail at once, each inventory detail is linked to a separate reservation and maintained separately; therefore, each are returned to inventory individually by either cancelling or deleting the reservation.

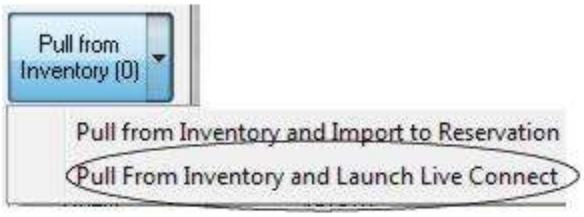


Combining this feature with the ability to group multiple inventory records together with a common group name gives you the ability to batch separate inventory records together and therefore ease the process of selling and pulling inventory that are all associated but include multiple components or vendors. Agencies that need to track multiple components (for vendor payment and sales purposes), but do not wish to break down the pricing of each component on their client invoices, can use the *Invoice Format* option *Hide Reservation Totals* (include only *Invoice Totals*), upon invoicing these types of transactions.

The link to that inventory detail remains permanent, unless the reservation is deleted, or the reservation status is changed to *Cancelled* or *Quoted*, at which time you are prompted for confirmation and if accepted, the link removed and the inventory replaced back into *Available* inventory.

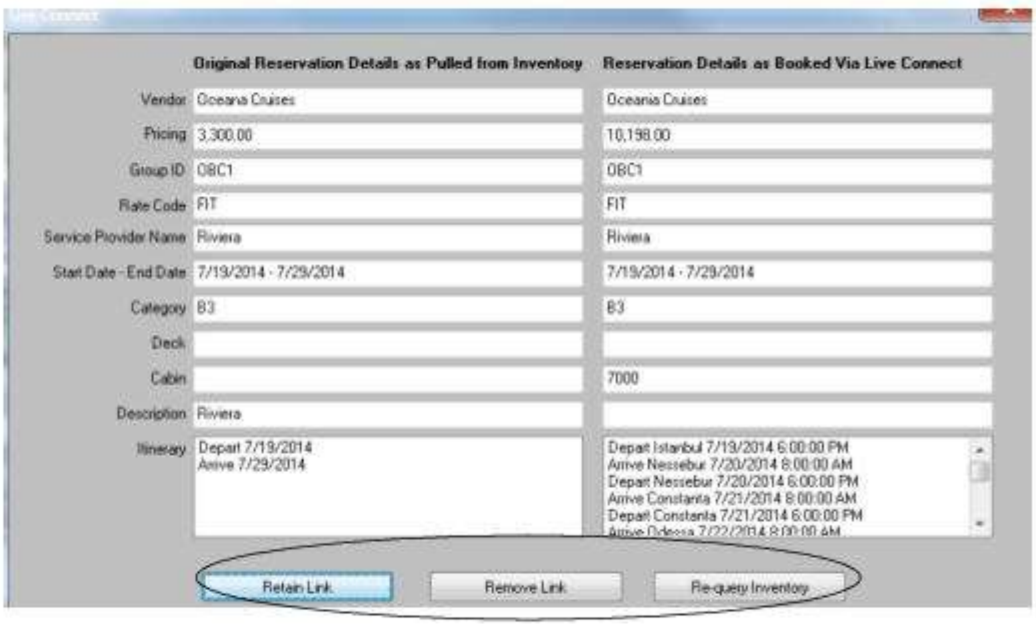
Launch Live Connect from Reservation Screen if Reservation is Pulled from Inventory (Sabre Cruises only)

Launch Live Connect from the reservation screen if the reservation was pulled from Inventory. This allows agencies to track sales of blocked space via inventory and still utilize the Res Card data to populate Live Connect. (Currently, this feature is only supported for Sabre Cruises.)



From a reservation created via inventory, when the *Pull From Inventory and Launch Live Connect* is clicked, the user is prompted, *This reservation is linked to inventory. Do you want to continue with Live Connect?*

When Live Connect is launched, the user can select *Create New*, select the desired checkboxes, and *Connect*. The rate code is passed as part of process, so the user will land directly on the *Cabin* web page. Profile data will also populate the Sabre Cruise website. Once the reservation is confirmed and the user clicks *Import Reservation*, if any differences between the ClientBase reservation and the Live Connect reservation exist, a table is displayed showing the differences between the two:



The user then has three options:

Retain Link: This keeps link to the Inventory record, but any differences in the booking imported via Sabre Cruises overwrite the reservation details that were created from Inventory.

Remove Link: This link releases the inventory record and the booking imported via Sabre Cruise replaces the reservation created from Inventory.

Re-Query Inventory: This allows the user to query for a different Inventory record and pull it into the Reservation, releasing the former Inventory. Any differences in the booking imported from Sabre Cruises will overwrite the reservation details created from Inventory.

If Live Connect is launched, *Import Existing Reservation* is also supported, but, there is no deep linking to the *Cabin* page. When *Import Existing* is selected from the reservation, the booking that matches the confirmation number is imported and the user gets the same prompt to *Remove Link, Retain Link, or Re-Query Inventory*. If *Import Existing* is selected from the res card, a new reservation is created.

Note: Live Connect now transmits the following information for Reservations that were pulled from Inventory: Group ID, Rate Code, Category, Deck, Currency Code, Start Date, Duration (calculated from Start and End dates), Vendor and Ship Name.

Launch Import Sabre Cruise Group Contracts into Inventory (Sabre Cruises only)

You are now able to import Sabre Cruise Group Contracts into Inventory. The Inventory Manager shopping cart button will now display two options: *Create ClientBase Inventory*, and *Import Group Contract from Sabre Cruises*.

When the latter option is chosen, the Live Connect screen will launch. Once the user connects to Sabre Cruises, they will land directly on the Group Contract screen. Users will have the option to link the inventory record to a ClientBase Group if desired. Import will be possible for all travel categories for which we have Inventory: Air, Cruise, Hotel, Rail, Tour, and Misc.

There is also an option to import a group contract from Sabre Cruises to the Create Inventory button.   Added a Group Inventory option to the **File|Import** menu. In **Global Defaults|Group List,** there is an Inventory Group ID field. If an Inventory Group has been linked to a Group ID in an Inventory record, the Group ID will display there as well.

Chapter 17: An In-Depth Look at Vendor and Service Provider Profiles

This chapter describes how to setup, maintain and use Vendor and Service Provider type profiles.

Introduction

Vendor profiles provide an easily accessible source for an agency to store pertinent information about its travel suppliers. Tour operators, cruise lines, hotels and car rental companies are some examples of vendor profiles. All the important details about these vendor are stored in one convenient place that everyone in the office can access. Key information such as phone numbers, rep contacts, supplier addresses, commission information, specials, preferred vendor status and cancel policies may be included in the profile.

Service Provider profiles represent the various components of a trip booked through a specific vendor. For example, the service provider for a Carnival Cruise booking would be the Carnival Destiny. Pertinent details about the Destiny would be stored in this type of profile and therefore accessible to everyone at the agency. Feedback from other travelers can be added in and accessed by all agents to better service future clients. Since some service providers could be booked by multiple vendors once the profile is created, it can be linked to one or more vendor profiles. For example, the Hilton Hawaiian Village could be booked through Pleasant Holidays or Classic Custom Vacation, etc. and once created as a service provider, can be associated with all these vendor profiles for easy access to the information. In some cases, a vendor may also be a service provider, like in the case of the Hilton Hawaiian Village.

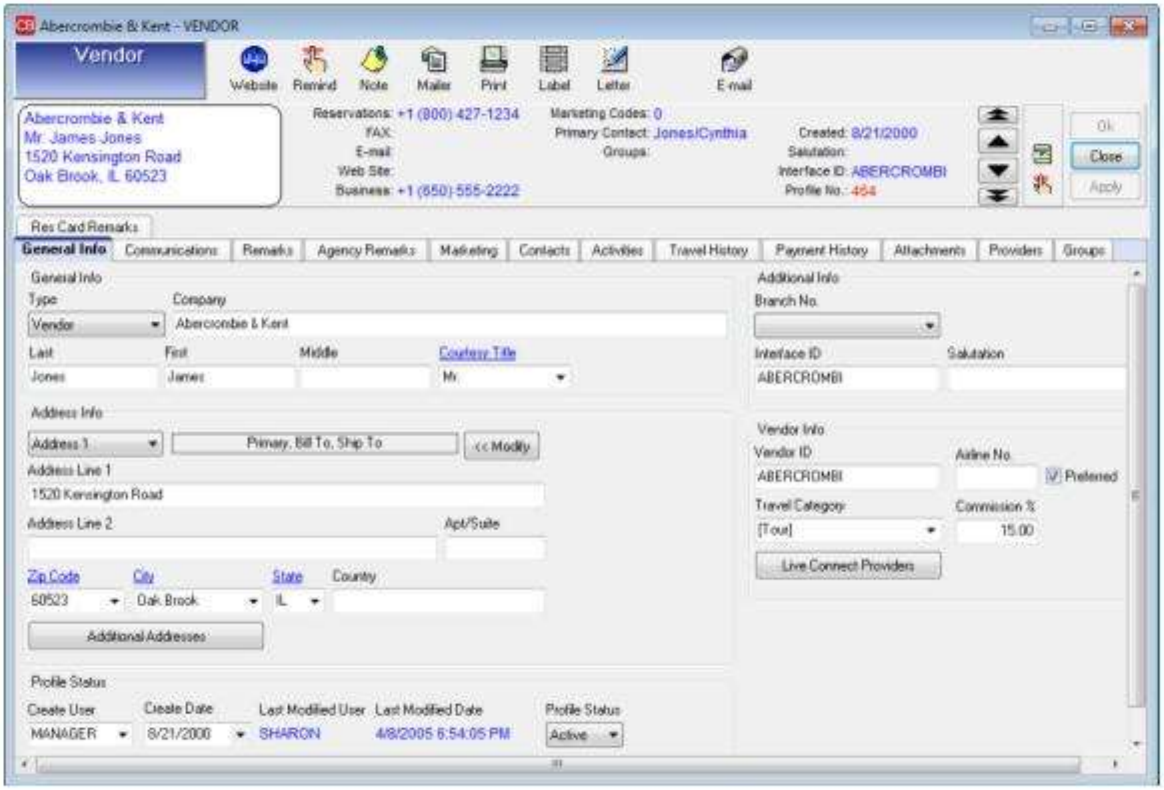
Why do we go to such lengths to differentiate between a vendor or service provider? It is so that client comments and feedback can be attached to specific service provider profiles, and the agency can obtain service provider reports. Instead of getting a report of how many clients went on a vendor (Carnival for example), obtain a report of how many people travelled on each of the vendor’s service providers (Ecstasy, Destiny, Triumph, etc.) as well. Also, when entering reservation information into the *ClientBase* Res Card, agents can capture vendor level information, and if desired, service provider level information. For example, an agent can point to the vendor profile for Carnival Cruise Lines while identifying the vendor for the reservation and can point to the Ecstasy when identifying the service provider.

In the past, agencies kept track of this vendor and service provider information in a variety of ways. Some agents used rolodexes with vendor and service provider special contact names and lists of phone numbers for each department. Other agents had folders which included brochures, specials, as well as any communication information they were able to obtain for each of the vendors and service providers. Still other agents memorized vital vendor and service provider information.

When a customer travels with a particular service provider and feedback information on its services, how is this information distributed to your agents? Is there one place an agent can go that summarizes what customers felt about a particular trip or service? With *ClientBase*, all vendor and service provider information is in one place for all agents. By creating rich, information-filled profiles for the vendors and service providers, each agent has quick access to this vital information.

Anatomy of Vendor/Service Provider Profile

A vendor profile in *ClientBase* stores an unlimited amount of information about your vendors and service providers. To organize all this information and make it easily accessible to all agents, each profile is made up of seven key areas - *Toolbar, Header Info, Scrolling Arrows, Indicator Icons, Control Buttons, Information Tabs, and User-Defined Fields.*



Let’s explore each of these seven key areas.

Toolbar

Launch a Website: Click *Website* to launch the *ClientBase* Internet Manager and the vendor/service provider’s website. (You must have entered the website URL in the *Website* under the communication area.) Copy any information on the website to keep in the profile by pressing <Ctrl><c> on your keyboard (or right mouse click and copy). Then paste that data into the profile by pressing <Ctrl><v> on your keyboard (or right mouse click and paste). Make sure to make this website the *Primary* website to activate this feature.

Create a Reminder: Click *Remind* to create a reminder for the vendor/service provider such as checking on brochure shipment. Fill in the date to be reminded, the priority, reminder type, an optional alarm and finally type in some free-flowing remarks for reference. There is an option to mark this reminder “Private” so that only the creation agent or SYSDBA can view it. This reminder appears on queries in the activity manager or reports.

Create a Note: Click *Note* to create a "Post-it" note documenting an important contact had with a vendor/service provider. By entering the date, time, and subject of the contact, a history of contacts is created which appears in the Activity Manager or reports.

Create a Mailer: Click *Mailer* to create a history documenting mailings sent to a vendor/service provider. By entering the date, time, and subject of the mailer, a "tickler" created which appears in the Activity Manager or reports.

Print: Click *Print* to print out details of the vendor/service provider profile.

Merge to Label: Click *Label* to create a label for the vendor/service provider.

Merge to Document Template: Click *Letter* to merge vendor/service provider name and address to any letter contained in the document templates. The master of the letter can be customized if desired by the user for a personalized touch.

Merge to E-mail: Click *E-mail* to merge vendor/service provider’s primary e-mail address into an e-mail screen.

Header Information

The header conveniently displays pertinent information including the current mailing address, the first five communication entries captured for this profile, number of Marketing Codes, Primary Contact, Groups, Profile Create Date, Salutation, Interface ID, and Profile No.

The header displays the first five Communication entries, in the order they are listed on the profile's Communications tab. If there are not five entries at the profile level, then the primary contact's communications are displayed next, in the order they are listed on the primary contact's communications tab. If there still are not 5 communications to display, then ClientBase picks up from the other contacts listed on the Contacts tab, in the order they are listed there, until all five slots are filled.

The items in the header are clickable. When clicked, the user is taken to that section of the profile. For example, when the Marketing Codes count is clicked, the Marketing tab opens; when the Primary Contact is clicked, that Contact record opens.

Scrolling Arrows

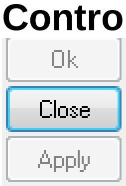
The four black arrows provide the ability to move among the profiles included within the current Query. The up arrow displays the profile (sorted alphabetically by last name) preceding the profile on the screen, and the down arrow displays the next profile.

Profile Indicators

Indicators to the right of the arrows appear if:

•There is a res card for this vendor (highly unlikely).
There is travel history (either from *Trams Back Office* or from invoicing in *ClientBase*) for this vendor/service provider.
•There is an open reminder for this vendor
•If the vendor/service provider has no open reminders or past travel history, no icons appear.

Control Buttons



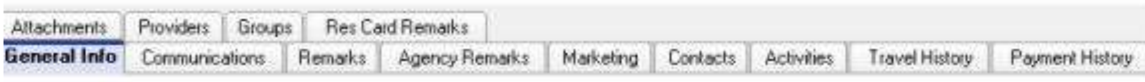
Close: Only appears if there are no unsaved changes made to the profile and exits the profile.

O.K.: Saves any information that has been added, modified or deleted and exits the profile.

Apply: Saves any information that has been added, modified or deleted and keeps the profile open.

Cancel: Appears only if the profile has changes that have not been saved, abandons those changes and then exits the profile.

Information Tabs

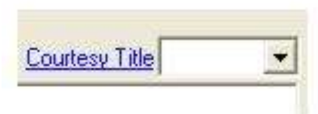


Each vendor profile contains the following information tabs: **General Info, Communications, Remarks, Agency Remarks, Marketing, Contacts, Activities, Travel History, Payment History, Attachments, Providers, Groups, and Res Card Remarks.**

Each service provider profile contains the following information tabs: **General Info, Communications, Remarks, Agency Remarks, Marketing, Contacts, Activities, Attachments, and Groups.**

See detailed review of each of these tabs in section entitled, *Detailed Review of Folders* at the end of this chapter.

User-Defined Fields

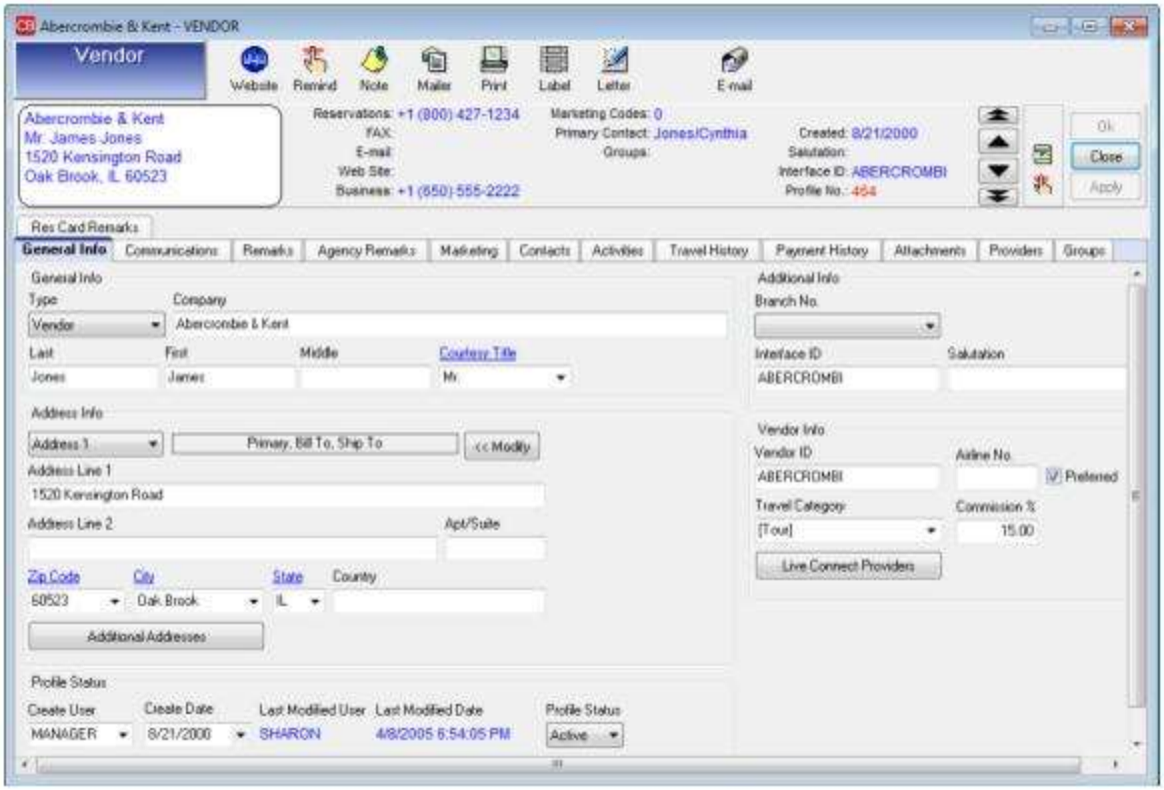


There are many fields in vendor/service provider profiles that can be customized for agency's use. While other data entry fields are labelled in black, user-defined fields stand out because they are labeled in blue. By going into the **Global Defaults|General Setup|User Defined Fields** area or simply double-clicking on the blue label before the field, detailed lists can be created for agent access in the form of drop-down menus. This gives an agency greater flexibility for entering vendor/service provider information.

Detailed Review of Folders

General Info Tab

The General Information folder displays vendor/service provider information.



Use the <Tab> key to move from field to field and <Shift><Tab> to move backwards from field to field; or use the mouse and click the desired field to enter data. The following fields are in the General Information folder:

Type*:* Indicate the type of profile by clicking the drop-down menu. Choices include vendor or service provider.

Company*:* Enter the name of vendor/service provider. Any printed reports or labels include the *Company* name entered here.

Last Name**:** Enter last name of primary contact.

First Name**:** Enter first name of the primary contact.

MI**:** Enter the middle initial of the primary contact.

Courtesy Title**:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. This field can be customized by going to **Global Defaults|General Setup|User Defined Fields|Courtesy Title** or clicking on the blue field label.

Address 1, Address 2: A vendor profile includes an unlimited number of addresses designated as Primary, Bill To, Ship To, Second Address and Alternate Address. Only one address though may be assigned as Primary, Bill To, or Ship To.

Assuming the address to be captured is the default type of *Primary, Bill To* and *Ship To*, then the address fields of *Address Line 1*, *Address Line 2*, *Apt/Suite, Zip Code, City, State* and *Country* can be entered right from the main screen. To capture additional address entries, such as a second address or alternate address, click *Additional Addresses*.

Apt/Suite: Enter the appropriate unit number.

City/State/Zip: Enter the city/state/zip data. These fields can be customized by going to **Global Defaults|General Setup|User Defined Fields|City/State/Zip** or click on the blue field label.

PROFILE STATUS

Create Date/Create User: These fields default to the system date and the user logged in at the time the profile is created. Both can be modified, but can be disabled by the database administrator. Agencies use this field to query for new customers so that “Welcome to the Agency" letters can be mailed. These fields can also be used to query for management reports reflecting user productivity in creating new client profiles.

Last Modified User/Last Modified Date: This area indicates the last time a profile was modified and by whom.

Profile Status: Indicate whether a customer profile is active or inactive by choosing from the drop-down menu. By default all profiles start with an active status. An inactive status has been included, since you cannot delete a profile that has invoices and payments attached. When querying, only profiles marked as active are included in the search, but you can perform a Level 2 search to view inactive profiles.

ADDITIONAL INFO

Branch No.: For agencies with multiple branches, enter the branch number (if applicable) from the drop-down menu.

Interface ID**:** In order to easily and consistently identify an existing customer or vendor within different applications used within the agency (*ClientBase*, your GDS, your Back Office etc.), a unique ID should be assigned to each profile. This ID is called the "Interface ID". As an example, this field is associated with the interfacing of records generated from the GDS (Front Office) to the agency accounting system (Back Office). If your agency works with client or vendor data within multiple systems then we strongly suggest creating a unique Interface ID for each profile. This field can be set as *Required* and a default *Value* can be automatically assigned when new profiles are created (see chapter *Setting Up ClientBase for Your Agency)*.

Salutation: The name used to greet the vendor/service provider contact; for example, if Mr. Henry Wilkenson likes to be called “Hank,” enter *Hank* in this field. If Mrs. Emily Anderson likes to be called “Mrs. Anderson,” enter *Mrs. Anderson* in this field.

VENDOR INFO

Vendor ID: The Vendor ID field is used exclusively to capture a consortium or marketing code for data roll-up purposes. **Note:** This is <u>not</u> the place to enter an Interface ID or a Live Connect Vendor code. The Interface ID field is where the Interface ID should be entered. To enter a Live Connect Vendor code, click *Live Connect* and link it to the Live Connect Provider and enter a Vendor Code based on the specifications contained in the directions for setting up the Live Connect provider.

Airline No: For airline vendor profiles, the three letter airline code goes here.

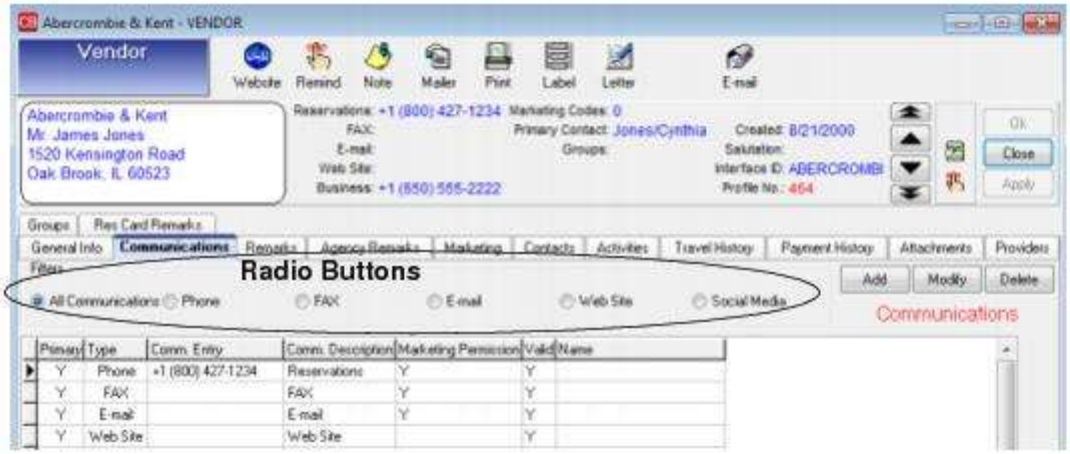
Preferred: If this is a preferred vendor/service provider, indicate this by checking the box.

Travel Category: Enter the Travel Category (if applicable) from the drop-down menu. A selection here shows up in the Traveler/Contact area of a client profile in the "preferred" vendors tables. This field is also used to automatically populate the default Travel Category for this vendor within a reservation in a Res Card. If there is more than one Travel Category assigned to the vendor profile, the Travel Category defaults to the first Travel Category in the list for that vendor when selecting a vendor in a reservation. If there is no Travel Category assigned to the vendor profile, the reservation defaults to the Travel Category of *Cruise* in the reservation.

Live Connect: This set-up area is for agencies to use Live Connect in the Res Card. Save time and improve efficiency by passing selected client information to the booking engine, then electronically pass back reservation details and automatically complete the reservation form with what’s been booked. For complete instructions on how to use Live Connect, please refer to the chapter entitled, *Using Live Connect in ClientBase.*

Vendor Commission %: This field is shared with the vendor commission default in *Trams Back Office* (TBO). The vendor commission % field is used to default the commission in a reservation record when this vendor profile is used.

Communications Tab



If you were on a previous version of ClientBase, communications have been moved out of the General Info tab of the Contact record into its own tab. The Primary Phone, Primary E-mail, Primary Fax, and Primary Web are now displayed in the list of Contacts on the Contacts tab in the profile. The first Communication entry of a given type is marked as the Contact's Primary (Primary box checked). Subsequent communication entries of that type default to unchecked.

By using the radio button on the top of the results screen, users can filter to view only one communications type at a time. Profile-level communication entries are displayed first, followed by the communications that are assigned to contacts. Contact communications are in the order that the contacts are listed in the Contacts tab. Profile level communications can be sorted using the blue arrows on the right side of the screen. These arrows are disabled when a Contact communication entry is selected.

Add, Modify, or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the Contact is linked to more than one profile. In that case, the user is warned, *This traveler is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Contact: Select the name of the contact from the drop-down. When adding a communication entry from the Contact level, there is no option to change the contact name by drop-down.

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries.

<u>Primary</u>: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

<u>Marketing Permission</u>: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

<u>Invalid</u>: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

Need to copy a communication's entry? Right-click on the entry and select *Copy Phone, Copy E-Mail,* or *Copy Fax.* Then paste the entry into other applications as needed.

Remarks Tab

The remarks folder provides a full-page view of the unlimited remarks and enables tremendous flexibility for entering comments into each vendor/service provider profile. The only limitation in the *Remarks* folder is the amount of available disk space.

View any miscellaneous comments from this screen. This area includes a mini-word processor with which an agent may customize free-flowing remarks:

Agency Remarks Tab

Here is another area where unlimited, free-flowing agency remarks can be entered. Whenever agents use this profile, they can access what other agents have written about this vendor or service provider. Such information is valuable so that each agent benefits from the collective experience gained by all customers and agents.

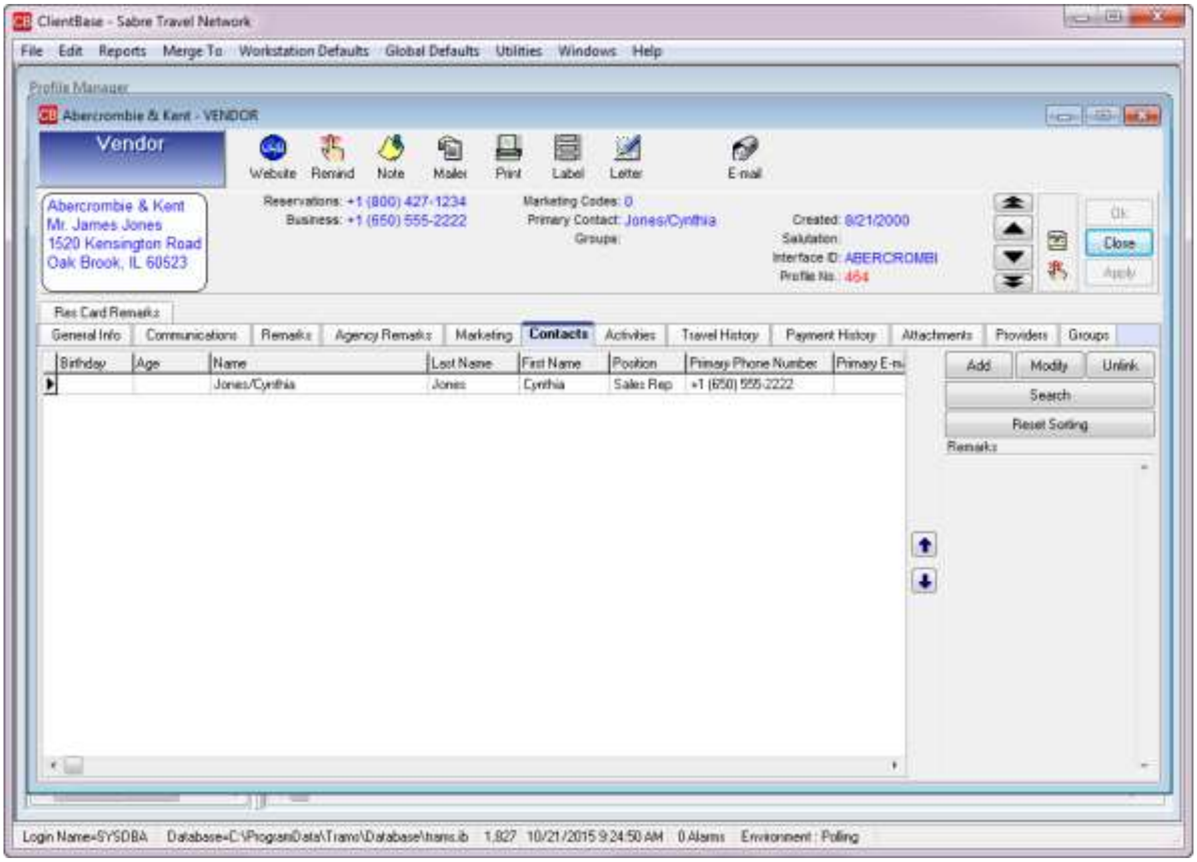
Marketing Tab

The Marketing Tab provides a way to track vendors by adding data about the supplier in a manner that agents can Query. For example, in the A & K profile, check off destinations that can be booked for this vendor, or a budget category this vendor falls in, or the type of travel this vendor sells. Then when searching for a vendor that meets the client's requirements, an agent can Query on these specific Marketing Codes.

When first installing *ClientBase*, default marketing tables and codes are located in the marketing tab. These default tables/codes can be modified, enhanced, or deleted. The default tables are included to give users basic ideas about what information might be effective. For instructions on tailoring user-definable Marketing Tables and Marketing Codes, please refer to the chapter of this manual entitled, *Setting Up ClientBase for Your Agency*.

To select and insert marketing codes into a Vendor/Service Provider profile, use the up and down arrows to scroll between tables. Select the codes which apply by clicking in the box on the left hand of each category. A summary of Marketing Tables and Codes applicable to this Vendor/Service Provider is displayed on the left hand side of the screen. To de-select Marketing Codes, simply uncheck each box.

Contacts Tab



The ***Contact*** folder is designed for detailed information on specific individuals who are key contacts with a vendor/service provider. The blue up-and-down arrows allow re-ordering the list of contacts. Vendor profiles have a "Reset Sorting" button which returns the list to alphabetical order. By highlighting a particular contact, you'll be able to see any remarks entered in the contact record.

Add a new traveler/contact by clicking *Add*. When a user adds a new contact record, the database is first automatically searched for any existing travelers/contacts that match. If a match is found, the user can select the existing contact from the list presented and click *Link* to link the existing traveler/contact. They may also click *Cancel* to return to their new traveler/contact.

When clicking *OK* again, the new traveler/contact is created. Any data that was entered while creating the new traveler/contact that did not exist in the linked traveler/contact record will be transferred.

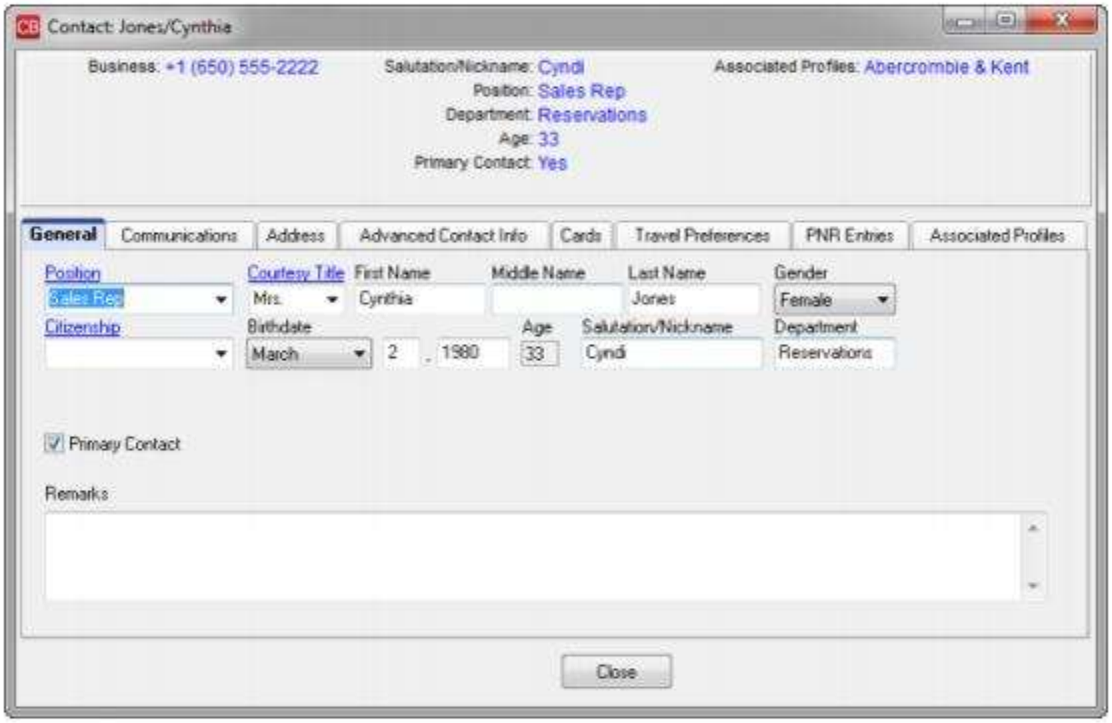
Example: An agent enters a passport number when entering a new traveler/contact. The agent clicks OK, and search finds an existing traveler/contact record, but the existing record does not have a passport number. When the agent selects the matching traveler/contact record, and data from the traveler/contact record is populated on the screen, the passport information that was missing is now completed also.

Conversely: If data was entered and the existing traveler/contact record contains information in that field, the existing traveler/contact data is retained. *Example:* Agent enters First Name, Last Name, and a birthdate of July 1, 1960, and then clicks OK. The traveler/contact Search results screen appears, and the agent decides to select one of the existing traveler/contact records. The existing traveler has a birthdate of April 12, 1965. The existing birthdate information overwrites the one the agent entered. (Users can always go back and edit if the original information was incorrect.)

To modify or enhance a contact, click *Modify* while the name is highlighted. If *Unlink* is clicked for a traveler/contact that is not linked to any other profiles, then a prompt is presented warning that the traveler/contact will be deleted completely. If *Unlink* is clicked for a traveler/contact that is linked to more than one profile, then a confirmation prompt is presented, advising that the traveler/contact will continue to exist in the other linked profiles.

By click the *Search* button, you can search for a contact that is located in another profile and attach the contact to this profile as well.

TRAVELER/CONTACT RECORD



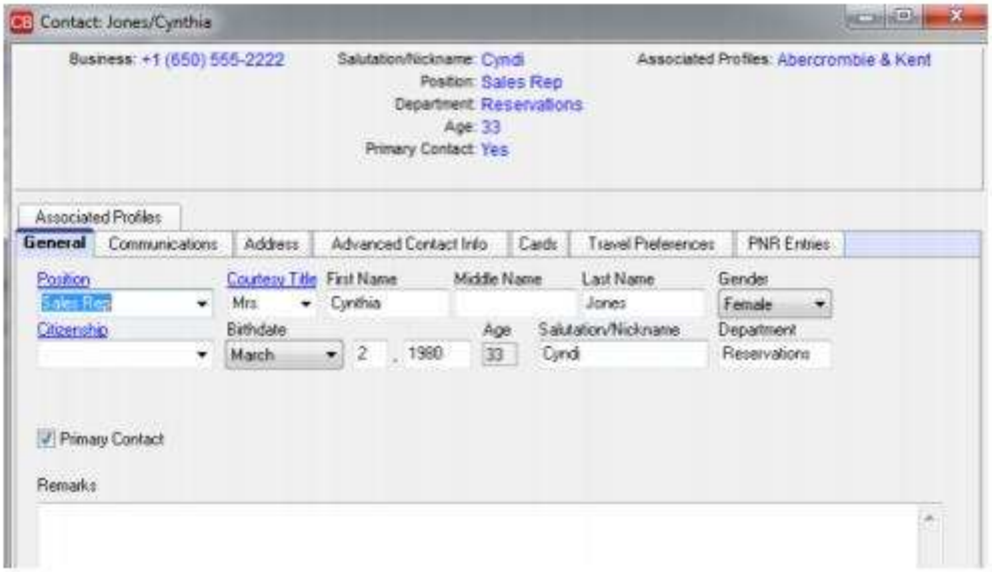
There are 8 tabs of information in a traveler/contact record - *General, Communications, Addresses, Advanced Contact Info, Cards, Travel Preferences, PNR Entries, and Associated Profiles.* Let's take a look at how to organize information for each traveler/contact by going through each field of the add/modify screen.

Notice the header in the Traveler/Contact record, similar to the header of a profile. It displays Contact Name, Address, Communications, Salutation/Nickname, Relationship/Position, Department, Age, Primary Traveler indicator, Associated Profiles, and Birthday and Expired Credit Card/Passport notification icons.

These two icons in the header are visual alerts of important dates:

.A birthday present icon appears during the traveler's birthday month and disappears once the birthday month has passed. A red exclamation point icon appears if the traveler has an expired passport or credit card. Clicking on the exclamation point icon takes the user to Card record if it's an expired credit card, or to the Advanced Traveler Info tab if it's an expired passport. The icon disappears when the expiration date is updated.

GENERAL TAB IN CONTACT RECORD



Position: By choosing from a drop-down menu, these user-definable items can be inserted.

***Courtesy Title*:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles.

***First Name*:** Enter the legal first name of the contact in this field. This provides correct information for booking purposes.

Middle Name*: Enter the legal middle name (for international traveling purposes).

***Last Name*:** Enter the legal last name of contact.

Gender*: Select contact gender from the drop-down menu.

Citizenship*: Enter contact's citizenship from the user-definable drop-down menu**.**

***Birthdate**:** Enter contact's birthdate including month, day and year, or any combination of those date fields. (If agent knows only month, enter it - you can query the database by month and send out birthday cards!)

Age: The Age field is auto-calculated based on the entries in the Birthdate fields. To auto-calculate the age, a year must be captured within the Birthdate and calculates based on the current date and the following logic:

- If a year but no month and day is captured, the Age is calculated based on Jan 1st of the birth year.

- If a month and year but no day is captured, the Age is calculated based on the 1st of the birth month and year.

- If a day and year but no month is captured, the Age is calculated based on Jan as the birth month.

Salutation/Nickname: This field allows a salutation or nickname to be entered for each contact. The Salutation/Nickname can be viewed in the Profile Manager results by adding the column to the Query screen.

Department: In profiles, there is a field to enter the contact's department.

Primary Contact: Click here if this is the primary contact for this profile. By default, the box is checked for the contact added to the profile, designating them as Primary. For subsequent contacts added, the box is unchecked by default. If a user checks the box when adding a new contact, making them Primary, the box automatically will be unchecked for the original primary contact. There can be only one Primary Contact per profile.

Remarks: Enter unlimited free-flowing information pertaining to this contact.

COMMUNICATION TAB IN CONTACT RECORD

By using the radio button on the top of the results screen, filter to view only one communications type at a time. Sort communications using the blue arrows on the right side of the screen. *Add, Modify,* or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the contact is linked to more than one profile. In that case, the user is warned, *This contact is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries, as well as the Client Survey report.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

ADDRESS TAB IN CONTACT RECORD

Contacts can only have one address. Contact Address fields were also added to Select Columns and Sort By Columns in Profile Manager query results screens.

Address Line 1: Enter an address line for this contact.

Address Line 2: Enter an additional address line if applicable for this contact.

Apt/Suite: Enter the apartment of suite number.

Zip Code: Enter zip code. This Zip Code entry auto-populates the City and State fields if this is set up in User Defined Fields, as it does in Profile-level addresses.

City: Enter city.

State: Enter state.

Description: Free-flow a description for this address.

Marketing Permission: Contact addresses have their own marketing permission checkbox, which defaults to checked.

ADVANCED CONTACT INFO TAB IN CONTACT RECORD

Passport Number**:** For up to 2 passports, enter traveler's passport number.

Expiration**:** Enter contact's passport expiration date. This is a great field to Query on to send out letters alerting customers that passports are about to expire.

Issue Date*: Enter contact's passport issue date.

Issuing City*: Enter contact's passport issuing of origin from the user-definable drop-down menu).

Issuing Country**:** Enter contact's passport issuing country of origin from the user-definable drop-down menu**.**

* Heightened security has increased the amount of traveler information agencies need to collect for international travel bookings:

Redress Number/Known Traveler Number: Use this area for TSA numbers assigned to contact.

Emergency Contact: Emergency Contact information includes Name, Phone Number and a Miscellaneous text field to capture any additional information about the emergency contact such as the relationship to the Contact.

CARDS TAB IN CONTACT RECORD

Enter frequent flyer, credit card, cruise program, and miscellaneous card information pertaining to this contact. All cards entered at the contact level also appear within the listing of cards at the profile level. Click *Add* to enter a new card:

Card Type/Card Code/Card Description: Card types are *Credit Card, Frequent Flyer, Hotel Program, Car Program, Car Program, Cruise Program, Other and Discount Card.*

The *Discount Card* in the drop-down list of cards that can be selected in the Cards tab for use with discount programs such as AAA Memberships, AARP, etc. This card type is formatted exactly like all other card types (name, card type, card code, card description, number, expiration, etc.). By entering the *Card Code,* the *Card Description* is auto-filled.

Merge to PNR: By default any new credit card entries default to ***Use Global PNR Rule*****.** With this setting credit cards continue to merge as they have in the past based on the global credit card PNR Rule. If this Merge to PNR setting is changed to *Always*, then regardless of the global PNR Rule for credit cards, the credit card defaults to being selected on the Merge to PNR Selection Screen. If this Merge to PNR setting is changed to *Optional*, then regardless of the global PNR Rule for credit cards, the credit card defaults to not being selected on the Merge to PNR Selection Screen. This feature gives you the ability to set the *Always/Optional* setting at the credit card entry level as well as the Global Defaults level.

Card Number/Expiration: Enter the *Card Number* without dashes and use the last day of the month it expires (*Expiration)* in the correct year.

Issued by/Remarks: These are optional fields to put additional data.

Name on Card: The name on the card should default to the traveler's name. If someone else's name is on the card, change it here.

Upon saving or editing Credit Card numbers, *ClientBase* validates the card number. Note: Upon saving or edit a credit card number, *ClientBase* now validates the card number. If the number is invalid, a prompt occur: *The credit card number entered appears to have a typographical error or it is not a valid credit card. Do you want to continue saving this record?* This prompt serves as a warning that there may have been a data entry error (typo).

Selecting **YES** saves the card As Is.

Selecting **NO** returns user to the card number field.

When editing an existing card number, validation does not occur unless the card number field is modified. Validation occurs in Profile Cards Tab, Invoice Form of Payment Credit Card and CC Merchant, Invoice Booking Payment Credit Card and CC Merchant, Reservation Payment Due Date tab, Receipt Form of Payment CC Merchant FOP.

***Valid credit card numbers with spaces do not prompt

***Valid credit card numbers with letters (VI1234123412341234) do not prompt

***Valid credit card numbers with expiration date after a slash (CA5458004519231383 /1109) will not prompt (although we do not recommend entering the expiration date in the CardNumber field.)

TRAVEL PREFERENCES TAB IN CONTACT RECORD

Under this tab each travel category appears in a new tree view. Travel Categories are listed in the tree on the left side and Travel Preferences for each are on the right. This gives the ability to capture travel preferences globally by Travel Category, but also the ability to capture travel preferences for each preferred Vendor. It is not mandatory to have preferred preferences for a preferred vendor. It is also not mandatory to select preferred vendors for a client.

Click the Travel Category name to view and/or set up global travel preferences for the category. Preferences set up for the travel category will automatically default as the preferred preference for each preferred vendor selected for that category, however, the vendor preferences can be modified.

To add a preferred vendor, click the *Add* button at the bottom of the Travel Category tree. A *Find Vendor* screen is displayed. Select the Travel Category and the Vendor and click *OK*. Preferences are shown for the vendor based on the default preferences for the Travel Category. Make adjustments to the preferences as needed.

A new field, *Desirability* is available in preferences for future use with *Sabre Graphical Profiles*. The *Desirability* field is displayed when adding or viewing a preferred vendor. Desirability options appear as a drop down to select from. Selections are: *Do Not Use, Dislikes, No Preference, Favorable, and Very Favorable.*

All Travel Categories now use the user defined field Special Options. For Air Preferences, Meal Preferences is named Meal Type which links to a Meal Code field that was also added. Air Craft Type is available as a preference. For Cruise Preferences, Ship Name and Departure Port are available as User Defined fields and are displayed as preference options. When using contact columns in queries, the default global preferences are displayed in the query.

PNR ENTRIES TAB IN CONTACT RECORD

In order to capture contact-related PNR entries (such as general remarks, special meal requests, air/car/hotel preference, UDID's, etc.), a tab is included in the contact record for leisure and corporate client profiles.

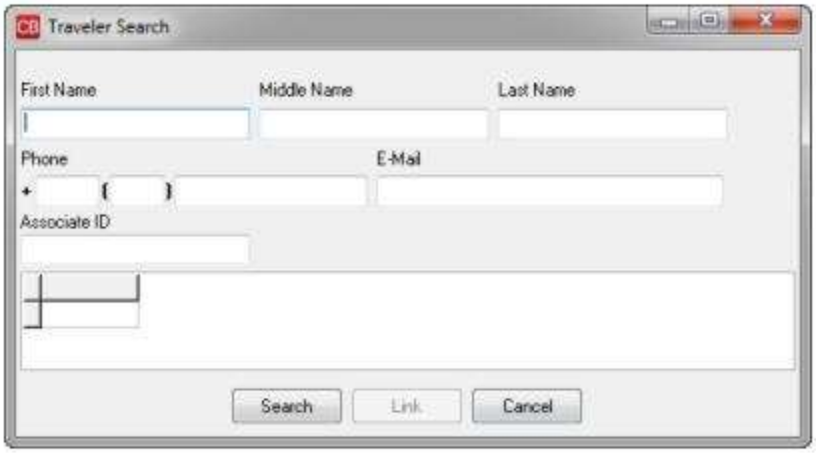
ASSOCIATED PROFILES TAB Contact Record

This tab allows the user to view all the profiles that a given contact is linked to. By clicking *Open,* user has the ability to hop into another profile.

Linking a Contact Record to Another Profile

In *ClientBase*, you have the ability to link a traveler/contact record to multiple profiles. All data captured within the traveler/contact record is linked to the new profile.

Linking a Traveler/Contact Record:



1) Retrieve the desired profile to which you want to link a traveler/contact record. For example, you may want to link a leisure traveler/contact to a Corporate profile.

2) Click the profile Traveler/Contact tab and *Search*.

3) Type in at least 2 pieces of data in the search fields and *Search*.

4) When the traveler/contact result comes up, click *Link*.

5) All the traveler/contact data is now in the new profile.

TIPS: Search by phone or e-mail address alone, or in combination with any of the name fields. If searching by name only, users must enter something in at least two of the three name fields.

Examples:

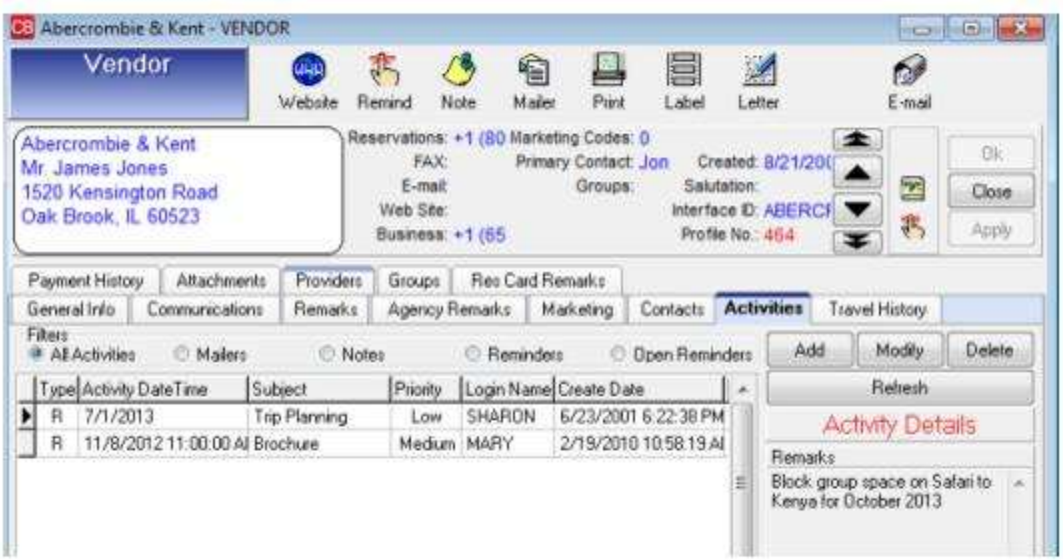
**User enters First Name of Ken and an e-mail address of ken@example.com. Ken Able, who has that address, is returned; Ken Jones, who does not have that e-mail address, is not.

**User knows the last name, but isn't sure exactly how the first name is spelled. He enters First Name A and last name Smith. All Travelers whose first name starts with A (Alice, Anne, Alex,) and last name starts with Smith (Smith, Smith-Jones) are returned.

**User knows that Mary Anne Jones has married, but doesn't remember the Traveler's new last name. She enters First Name Mary and Middle Name Anne. All Travelers with that first and middle name are returned.

**User knows the traveler's phone number and enters (650) 555-1212. All travelers with that phone number are returned.

Activities Tab

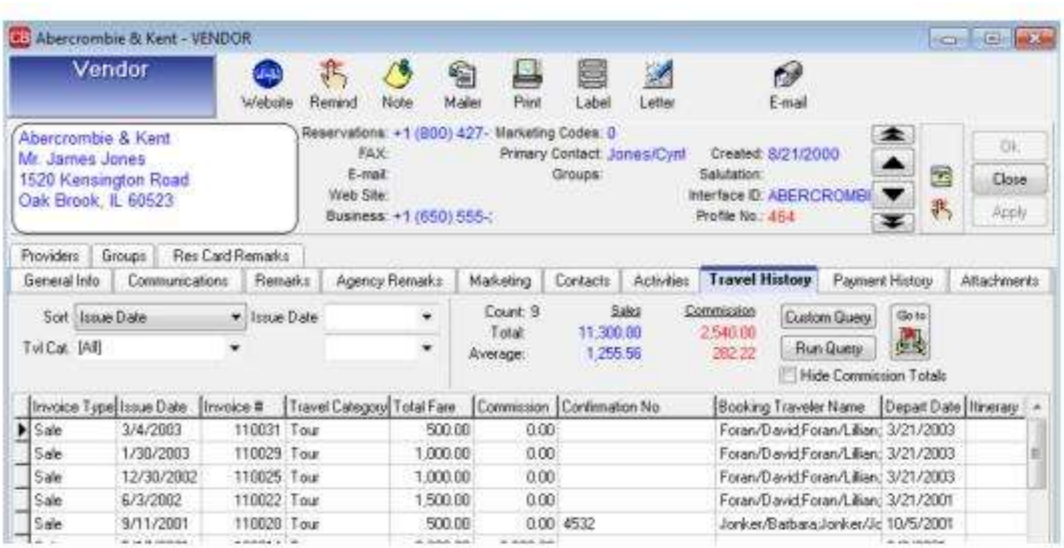


Any agent can see the history of contacts made with a specific vendor/service provider by clicking the Activities Tab.

This tab displays a complete history of all contacts associated with this specific vendor. Included are Notes (record of interaction with vendor), Reminders (record of scheduled past and future activities) and Mailers (record detailing mailings sent to this vendor). To add a new Note, Reminder or Mailer, click *Add*; to modify or enhance a Note, Reminder or Mailer; click *Modify*; or click *Delete* to remove it.

Notice the radio buttons located directly above the activities results screen. This allows for quick filtering of the results appearing in this tab. By default ALL Activities are displayed, but options for viewing just Mailers, Notes, Reminders, or Open Reminders are available. Notice any remarks for the activity displayed to the right for each highlighted entry.

Travel History Tab



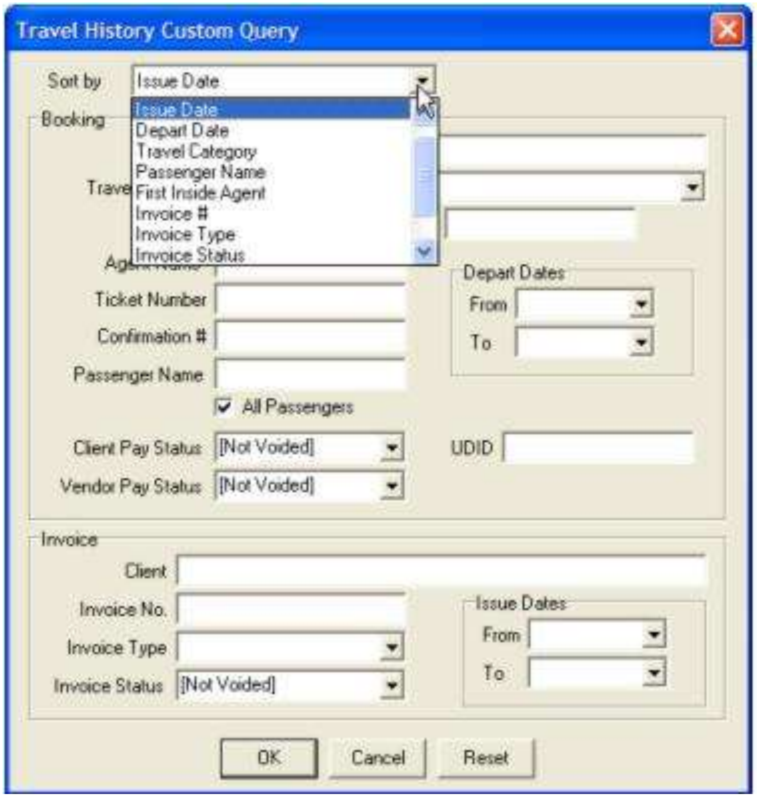
From this window, agents can easily review past travel purchases. Since invoices in *Trams Back Office* only point to a vendor and not service providers, this tab only appears in the vendor type profiles. The **Travel History** folder lists invoices generated either in *TBO* or *ClientBase*. Performs customized queries to display invoice/travel history. Imagine each agent being able to see what vendor sales were made by the agency in the past, including the sum total of those sales, the average booking amount, and the total commission earned by the agency as a result of those sales — fast!

Fill in the following fields to obtain specialized queries:

***Sort*:** Enter how data is sorted by using the drop-down menu to select Issue Date, Depart Date, Travel Category, Traveler Name, Agent, Invoice #, Invoice Type, Invoice Status.

Trvl Cat.: Enter the travel category from drop-down menu.

***Issue Date*:** Enter the from and to issue date by clicking the drop-down menu. Click *Run Query* to display desired query. By clicking *Custom Query*, a more detailed Query can be setup. Fields to Query on include the Booking Fields: Vendor, Travel Category, Total Fare Range, Agent Name, Ticket/Confirmation #, Traveler/Contact Name and Depart Date Range. Invoice Fields to Query on include: Client, Invoice No., Invoice Type, Invoice Status, and Issue Sales Date Range.



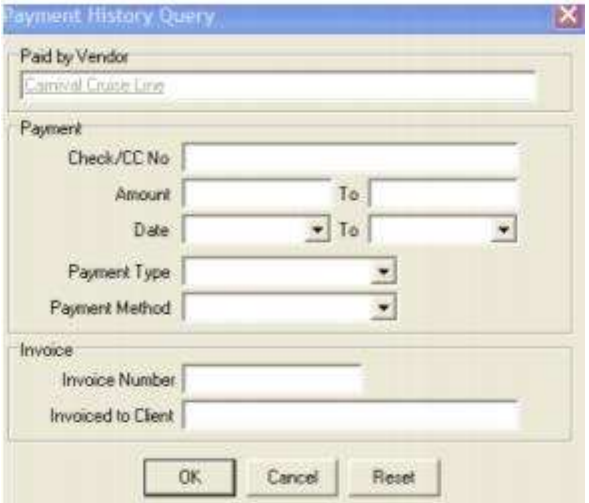
Hide Commission Totals: By default, this box is unchecked. Once checked, the red Commission numbers in the header are hidden. The checkbox setting is "sticky" - once checked, it remains checked for all profiles until it is unchecked. The Commission column is not hidden; customers who are using this setting may wish to drag that column off to the right in order to conceal it.

Quick Tips: Want to see the payment for a particular invoice quickly? Right-mouse click on the invoice line, and *View Payments for this Invoice number.* Or access the Res Card for the invoice you have selected by clicking the *Go to* button.

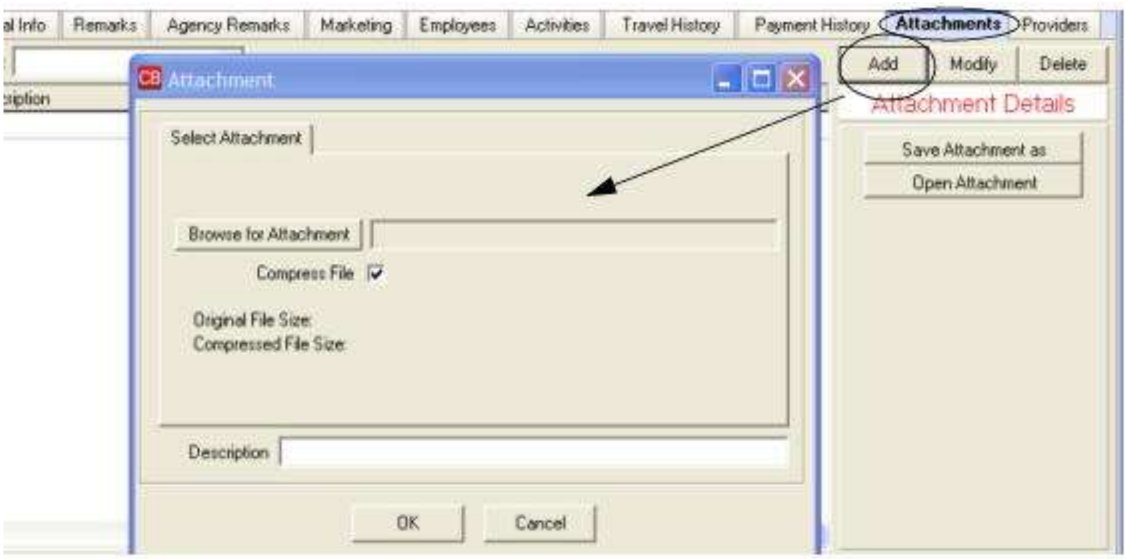
Payments Tab

View actual payment information *Trams Back Office* program including receipts and disbursements. Fields include dates paid, amounts, check numbers. Agents can now easily find out if a payment has gone out to a vendor or if a commission check has come in from a vendor. (Since payments in TBO only point to vendor profiles, not service providers, this tab is only available in vendor type profiles.) To limit access to this information for users in your office, use User Logins to disable this, or any profile tab.

When this tab is opened, it automatically reveals payments made to or received from the vendor. To sort the list, click *Custom Query*, fill in specific criteria and click *Run Query* to have specific payment info displayed. Fields include Check/CC No; Amount; Date Range; Payment Type and Payment Method.



Attachment Tab



To enhance the amount and type of information accessible in a *ClientBase* profile, a feature is included in all profile types allowing you to point to other files available on a local or network drive. These files are referred to as *Attachments*. Attachments are listed alphabetically by *Description*, and can be sorted from the drop-down menu by *Description, File Name, Directory Path, Computer Name, Original File Source, Compressed Size, File Date/Time, or Modified Date/Time.*

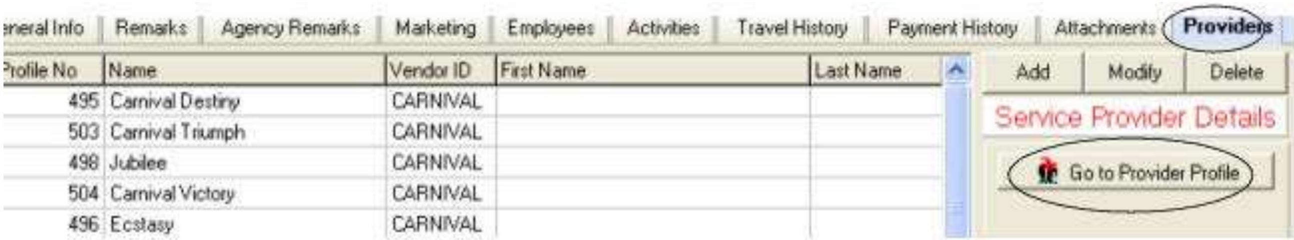
To add a new attachment click *Add*, and *Browse for Attachment* to identity the file path of the file. The file path includes the drive where the file is located, any directories or sub-directories, and the name of the file. Choose to compress the file by clicking *Compression*. Enter a brief description of the attachment, if desired. When retrieving a profile and viewing attachments, the attachments are listed alphabetically by *Description*.

Note: Although these file paths are created from one workstation, they are saved as part of your *ClientBase* database and so accessible from any *ClientBase* workstation.

To view a saved attachment, highlight the attachment, and click *Open Attachment* or double-click on attachment to open. *ClientBase* uses Windows association to view the file type, load the appropriate software, and retrieve the specified file. Every file has an extension (e.g., .doc, .jpg, .bmp, .html, etc.) that must be associated with a specific Windows software program such as MS Word, Paint Shop Pro, Internet Explorer, etc. to be viewed. Although this association is created automatically by Windows when various software programs are installed, if a workstation does not have a software program associated with the type of file an attachment is pointing to, then the file cannot be viewed from the attachment created in *ClientBase*.

Modifications to a file launched from *ClientBase* attachments can be saved automatically back into *ClientBase*. If an attachment is opened and then modified and saved, upon closing the attachment you land on the attachment settings window. Clicking *OK* from this area saves the newly modified file back to *ClientBase*. Click *Delete*, while the name is highlighted, to remove an attachment. *Save As Attachment* allows you to save a copy of the attachment into another file location.

Providers Tab



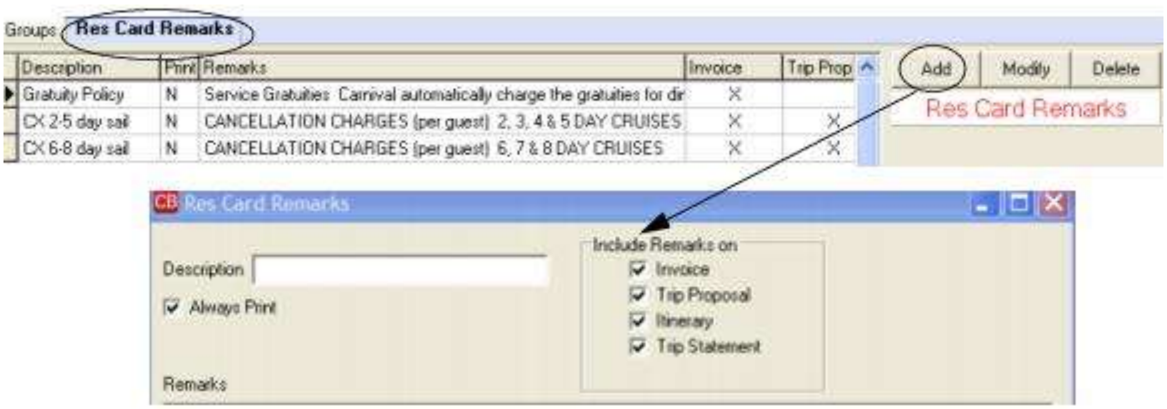
This tab only appears in vendor type profiles and allows your agency to link any number of service provider profiles to a vendor profile. For example, if you are working on creating a rich profile for Carnival Cruise Lines and would like to link the Ecstasy service provider to the vendor profile, this is where to accomplish this. To link a service provider to this vendor, click *Add, and* a list of all vendors and service provider profiles appears for selection. Click *OK* to save. To modify a link to an existing provider, click *Modify* and click *Delete* to remove the link to this vendor. To view the profile details for any service provider linked to the vendor, highlight the service provider then click *Go to Provider Profile*.

Groups Tab

Profiles may be associated with a specific group that has been created by the agency. There is no limit to how many groups one profile may be associated with. Enter a group(s) to which this vendor belongs by clicking the drop-down menu item after clicking *Add*. This group table is shared with *Trams Back Office*. Customize these items by going to **Global Defaults|General Setup|User Defined Fields|Groups: Vendor**, or by clicking the group blue field name in the profile. To add a new group to the vendor's profile, click *Add;* to modify or enhance an group, click *Modify*; and *Delete* to remove it.

Res Card Remarks Tab

Whenever an invoice, itinerary, trip proposal, or trip statement is printed involving this vendor, enter these profile level Res Card Remarks to print accordingly. For example, if you would like Carnival's specific cancellation policy to print on any invoice that involves Carnival, add Carnival's policy here. You can also capture client specific or agent specific Remarks as well within the Client and Agent profile tab called Res Card Remarks.



Click *Add* and complete following fields:

Description: Enter a brief 15 character description of the Remark.

Always Print: Place a check here if you would like these remarks to print by default. Leave this field unchecked if you would like to force the user to select this remark to print at the time of printing the document.

Include Remarks On: Create different remarks for different documents. Select which document you would like to include this remark by placing a check within *Invoice, Trip Proposal, Itinerary, Trip Statement* or *Receipt*.

Remarks: Enter your free flow remarks here. There is no limit to the number of characters.

Add multiple remarks for each profile and arrange the desired ordered by highlighting a remark from the listing and clicking the blue arrows to move it up or down in position.

Click *OK* to Save.

Note to *Trams Back Office* Users: When an invoice has Vendor Res Card remarks, those remarks are now included on the TBO booking field Vendor Remarks.

Chapter 18: An In-Depth Look at Agent Profiles

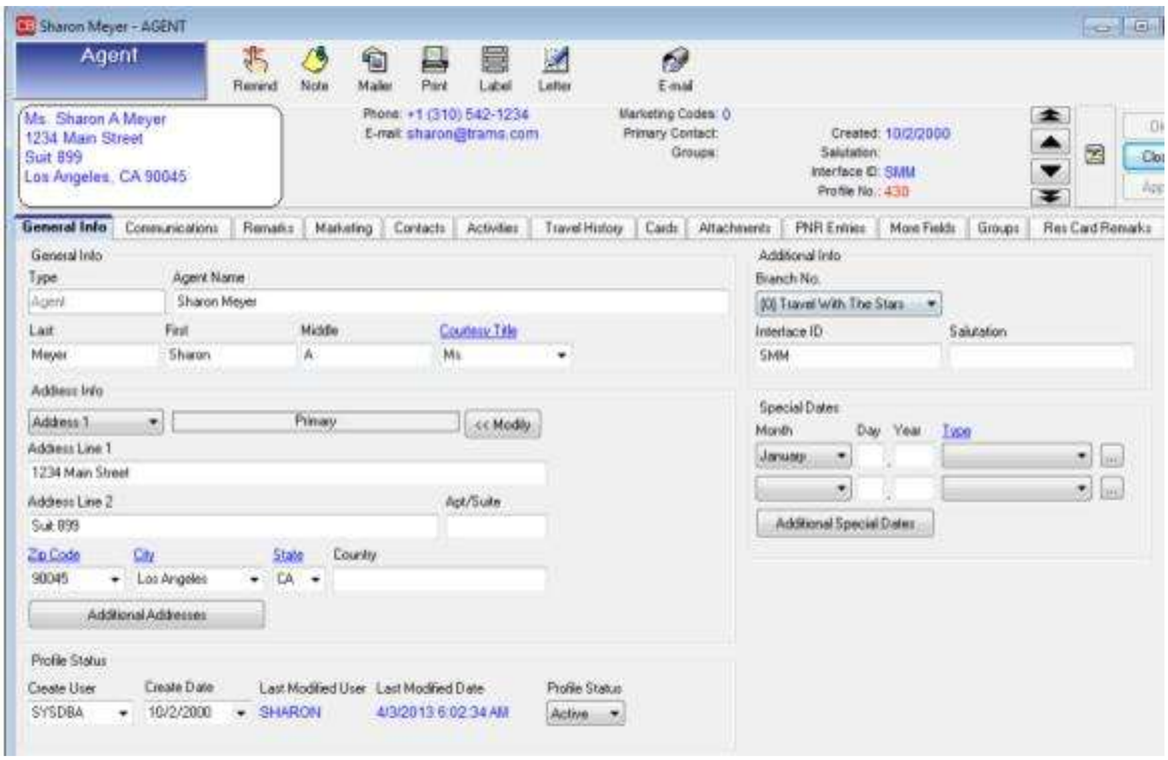
This chapter familiarizes you with how to setup, maintain and use Agent Profiles.

Introduction

Why would you want to keep an in-depth profile on each of your agents? Personnel and resource information are two reasons that immediately come to mind. Other examples include emergency contact information, payroll and tax information, and to track expertise. For example, you just had a hot special interest scuba dive special land on your desk. You know you have several customers with an interest in scuba diving, but can’t recall if any of your agents have any expertise with this niche. If you have carefully maintained your agent profiles, you can simply set scuba diving as one of the marketing filters in your Query and run an agent report. Quickly identify just the right agent to lead your group.

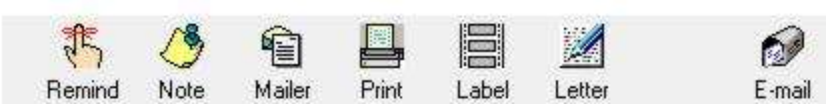
Anatomy of an Agent Profile

Agent profiles in *ClientBase* store an unlimited amount of information about agent entities. To organize all this information and make it easily accessible, each profile is made up of seven key areas (Toolbar, Header Info, Scrolling Arrows, Control Buttons, Information Tabs, and User-Defined Fields).



Let us explore each of these seven key areas:

Toolbar



Create a Reminder: Click the Remind icon to create a reminder for the agent. An agent reminder might be a personal reminder that appears on her to-do list, such as remembering to attend a CTC meeting. Fill in the date you wish to be reminded, set the priority, reminder type, set an optional alarm and finally type in some free-flowing remarks for reference. There is an option to mark this Reminder “Private” so that only the creation agent or SYSDBA can view it. This reminder appears on queries in the Activity Manager or reports.

Create a Note: Click the Note icon to create a note documenting any contact you have with an agent. By entering the date, time, and subject of the contact, a history of contacts is created that appears in the activity manager or on reports.

Create a Mailer: Click the Mailer icon to create a mailer documenting mailings you have sent to an agent. By entering the date, time, and subject of the mailer, a history of mailers is created that appears in the activity manager or reports.

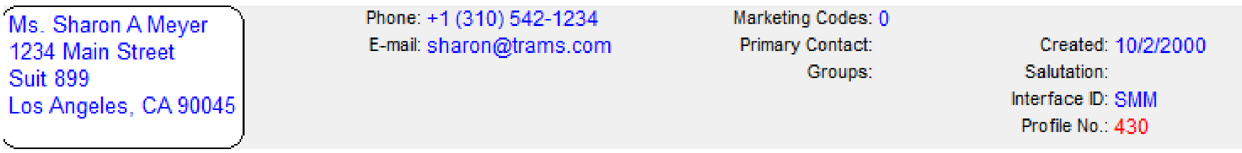
Print: Click the print icon to print out details of the agent profile.

Merge to Label: Click the label icon to create a label for the agent.

Merge to Document Template: Click the letter icon to merge agent name and address to any letter contained in the document templates. The letter can be customized by the user to add a personalized touch.

Merge to E-mail: Click the e-mail icon to merge agent's primary e-mail address into an e-mail screen. Complete the e-mail.

Header Information



The header conveniently displays pertinent information including the current mailing address, the first five communication entries captured for this profile, number of Marketing Codes, Primary Contact, Groups, Profile Create Date, Salutation, Interface ID, and Profile No.

The header displays the first five Communication entries, in the order they are listed on the profile's Communications tab. If there are not five entries at the profile level, then the primary contact's communications are displayed next, in the order they are listed on the primary contact's communications tab. If there still are not 5 communications to display, then ClientBase picks up from the other contacts listed on the Contacts tab, in the order they are listed there, until all five slots are filled.

The items in the header are clickable. When clicked, the user is taken to that section of the profile. For example, when the Marketing Codes count is clicked, the Marketing tab opens; when the Primary Contact is clicked, that Contact record opens.

Scrolling Arrows

The four black arrows provide navigation to move among the profiles included within the current Query in the results screen.

Profile Indicators

Indicators to the right of the arrows appear if:

- There are res cards for this agent
- Travel History indicates this agent has invoice history
- An open reminder alerts of some future action is scheduled to take place.

If the Agent has no open Reminders or past Travel History, no icons appear.

Control Buttons

Close: Takes you out of the profile and only appears if there are no unsaved changes made to the profile.

O.K.: Saves any information that has been added, modified or deleted and exits the profile.

Apply: Saves any information that has been added, modified or deleted and keeps you in the profile.

Cancel: Appears only if the profile has changes that have not been saved, abandons those changes and then exits the profile.

Information Tabs

Each agent profile contains the following information tabs: **General Info, Communications, Remarks, Contacts, Activities, Travel History, Cards, Attachments, PNR Entries, More Fields, Groups, and Res Card Remarks.**

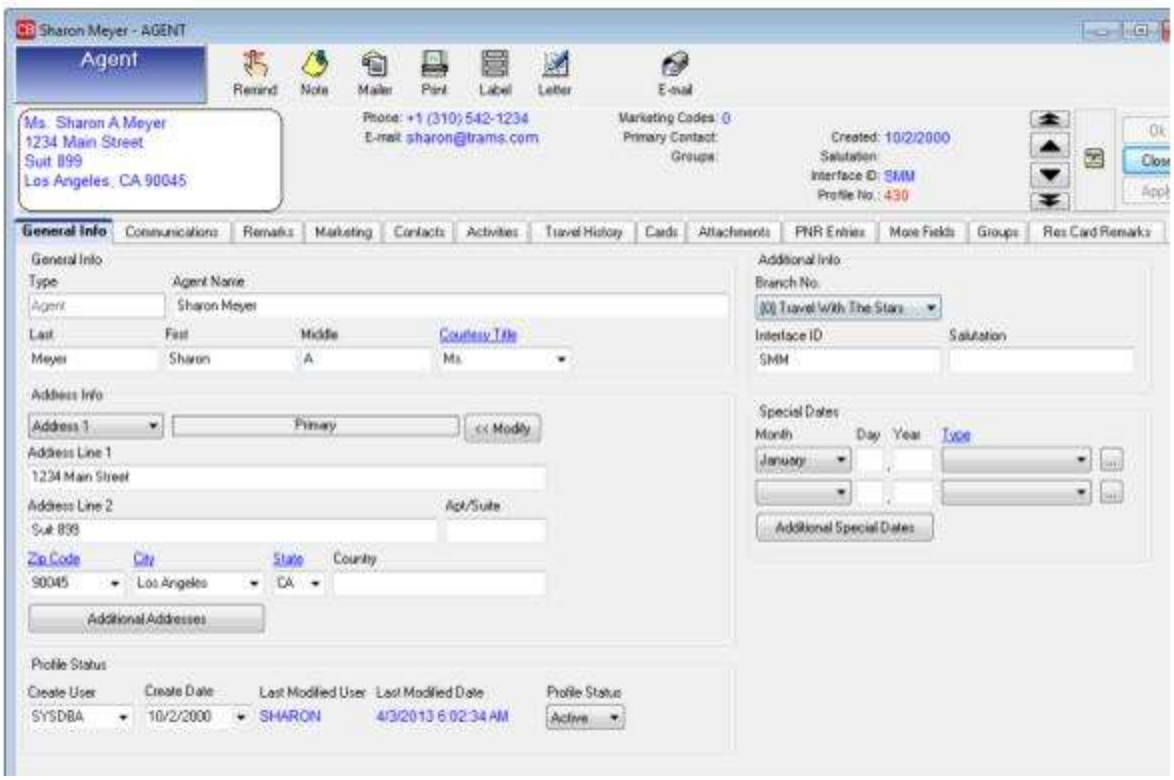
User-Defined Fields

There are many fields in agent profiles that can be customized for agency's use. While data entry fields are usually labeled in black, user-defined fields stand out because they are labeled in blue. By going to **Global Defaults|General Setup|User Defined Fields** detailed lists of items of these fields can be added, edited, or deleted (or you can simply modify these areas by clicking on the blue label).

Detailed Review of Agent Folders

General Info Tab

The General Information folder displays agent information.



Use the <Tab> key to move from field to field and <Shift><Tab> to move backwards from field to field; or use your mouse and click the desired field to enter data. The following fields are in the General Information folder:

Type: This field defaults to agent.

Agent Name: Enter the name of agent. Any printed reports or labels include the *Agent* name entered in the General Info folder.

Last Name**:** Enter the last name of agent.

First Name**:** Enter the first name of the agent.

Middle**:** Enter the middle name of the agent.

Courtesy Title**:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. The drop-down menu allows you to select from a lengthy, standardized list. The courtesy title is printed on mail labels.

Address 1, Address 2: Profiles can include an unlimited number of addresses and may be designated as Primary, Bill To, Ship To, Second Address and Alternate Address. Only one address though may be assigned as Primary, one as Bill To and one as Ship To.

From this area, setup a different Bill To, Ship To, Second Address and Alternative Address by clicking *Additional Addresses*. The Second Address choice offers a date option.

Apt/Suite: Enter the appropriate unit number.

City/State/Zip: Enter the city/state/zip data. These fields can be customized by going to **Global Defaults|General Setup|User Defined Fields|City.State.or Zip**.

PROFILE STATUS

Create Date/Create User: These fields default to the system date and the user logged in at the time the profile is created. Both can be modified, but can be disabled by the database administrator. Agencies use this field to query for new customers so that “Welcome to the Agency" letters can be mailed. These fields can also be used to query for management reports reflecting user productivity in creating new client profiles.

Last Modified User/Last Modified Date: This area indicates the last time a profile was modified and by whom.

Profile Status: Indicate whether a customer profile is active or inactive by choosing from the drop-down menu. By default all profiles start with an active status. An inactive status has been included, since you cannot delete a profile that has invoices and payments attached. When querying, only profiles marked as active are included in the search, but you can perform a Level 2 search to view inactive profiles.

ADDITIONAL INFO

Branch No.: For agencies with multiple branches, enter the branch number (if applicable) from the drop-down menu.

Interface ID**:** In order to easily and consistently identify an existing customer or vendor within different applications used within the agency (*ClientBase*, your GDS, your Back Office etc.), a unique ID should be assigned to each profile. This ID is called the "Interface ID". As an example, this field is associated with the interfacing of records generated from the GDS (Front Office) to the agency accounting system (Back Office). If your agency works with client or vendor data within multiple systems then we strongly suggest creating a unique Interface ID for each profile. This field can be set as *Required* and a default *Value* can be automatically assigned when new profiles are created (see chapter *Setting Up ClientBase for Your Agency)*.

Salutation: The name used to greet the contact; for example, if Mr. Henry Wilkenson likes to be called “Hank,” enter *Hank* in this field. If Mrs. Emily Anderson likes to be called “Mrs. Anderson,” enter *Mrs. Anderson* in this field.

SPECIAL DATES

These fields are particularly useful to record unique dates for each specific customer. Enter the day/month/year (or any combination of these date fields) of the special date and choose the type by clicking the drop-down menu. Items in this list can be customized by going to **Global Defaults|General Setup|User Defined Fields|Special Dates**, or click on the blue label in the profile. Imagine the marketing possibilities, when several months before an anniversary, or vacation time, your agency suggests as a gift a trip reflecting the client’s preferences. By clicking *Additional Special Dates*, unlimited dates can be added.

Communications Tab

If you were on a previous version of ClientBase, communications have been moved out of the General Info tab of the Contact record into its own tab. The Primary Phone, Primary E-mail, Primary Fax, and Primary Web are now displayed in the list of Contacts on the Contacts tab in the profile. The first Communication entry of a given type is marked as the Contact's Primary (Primary box checked.) Subsequent communication entries of that type default to unchecked.

By using the radio button on the top of the results screen, users can filter to view only one communications type at a time. Profile-level communication entries are displayed first, followed by the communications that are assigned to contacts. Contact communications are in the order that the contacts are listed in the Contacts tab. Profile level communications can be sorted using the blue arrows on the right side of the screen. These arrows are disabled when a Contact communication entry is selected.

Add, Modify, or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the Contact is linked to more than one profile. In that case, the user is warned, *This traveler is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Contact: Select the name of the contact from the drop-down. When adding a communication entry from the Contact level, there is no option to change the contact name by drop-down.

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

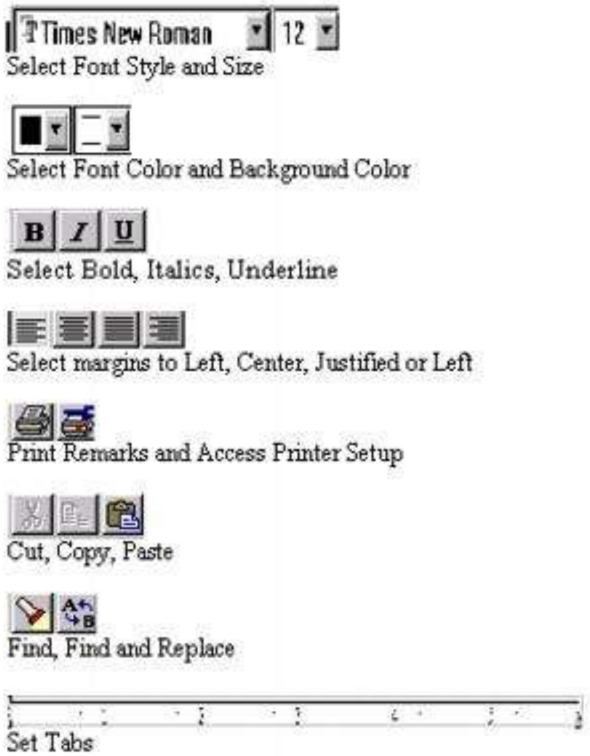
Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

Need to copy a communication’s entry? Right-click on the entry and select *Copy Phone, Copy E-Mail,* or *Copy Fax.* Then paste the entry into other applications as needed.

Remarks Tab

The Remarks folder provides a full-page view of the unlimited remarks and tremendous flexibility for entering comments into each agent profile. The only limitation in the *Remarks* folder is the amount of available disk space.

View any miscellaneous comments from this screen. This area includes a mini-word processor allowing an agency to customize free-flowing remarks:



Spell Check: Several dictionaries have automatically been installed onto each workstation running *ClientBase* providing you with the ability to identify misspellings within Document Templates. By default, while typing within any of these three areas, the spell check feature automatically underlines each misspelled word. Right-click on a misspelled word and you will be offered suggested spellings along with the ability to *Ignore, Ignore All* or *Add* to Dictionary. In addition a Spell Check button, labeled *ABC* has been added to the toolbar of the document templates allowing you to run the spell check routine across all data captured.

Contacts Tab

The ***Contact*** folder is designed for detailed information on specific individuals who are key contacts within a profile. The blue up-and-down arrows allow re-ordering the list of contacts. The *Reset Sorting* button which returns the list to alphabetical order. By highlighting a particular contact, you'll be able to see any remarks entered in the contact record.

Add a new traveler/contact by clicking *Add*. When a user adds a new contact record, the database is first automatically searched for any existing travelers/contacts that match. If a match is found, the user can select the existing contact from the list presented and click *Link* to link the existing traveler/contact. They may also click *Cancel* to return to their new traveler/contact.

When clicking *OK* again, the new traveler/contact is created. Any data that was entered while creating the new traveler/contact that did not exist in the linked traveler/contact record will be transferred.

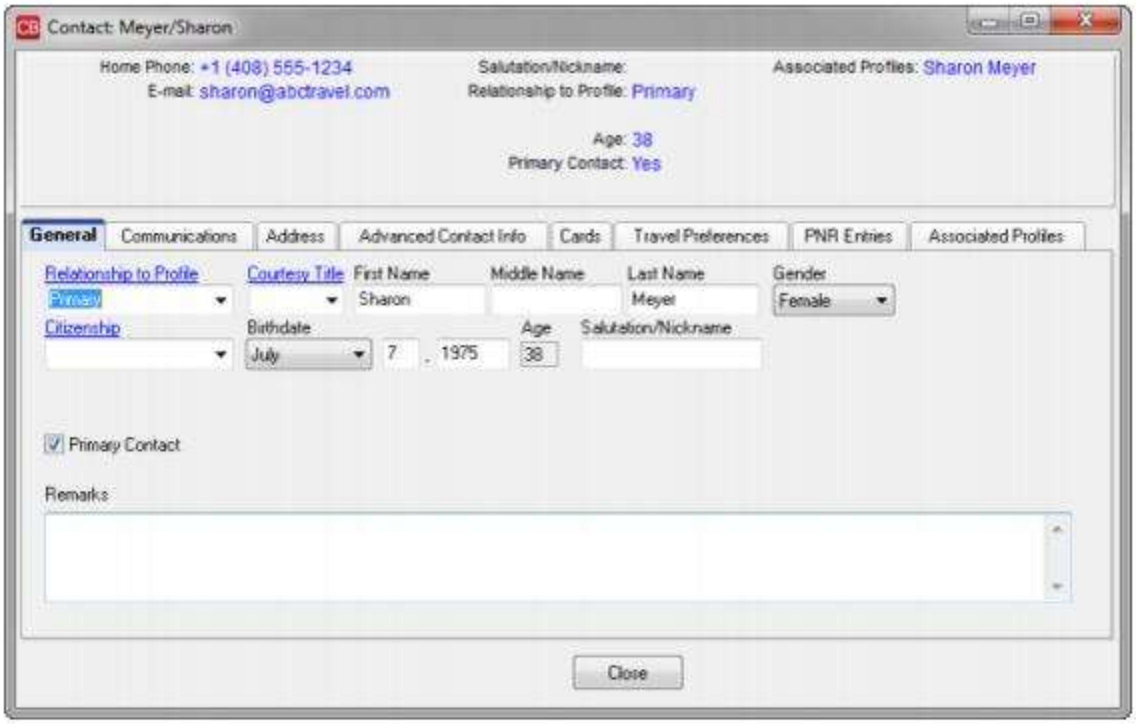
Example: An agent enters a passport number when entering a new traveler/contact. The agent clicks OK, and search finds an existing traveler/contact record, but the existing record does not have a passport number. When the agent selects the matching traveler/contact record, and data from the traveler/contact record is populated on the screen, the passport information that was missing is now completed also.

Conversely: If data was entered and the existing traveler/contact record contains information in that field, the existing traveler/contact data is retained. *Example:* Agent enters First Name, Last Name, and a birthdate of July 1, 1960, and then clicks OK. The traveler/contact Search results screen appears, and the agent decides to select one of the existing traveler/contact records. The existing traveler has a birthdate of April 12, 1965. The existing birthdate information overwrites the one the agent entered. (Users can always go back and edit if the original information was incorrect.)

To modify or enhance a contact, click *Modify* while the name is highlighted. If *Unlink* is clicked for a traveler/contact that is not linked to any other profiles, then a prompt is presented warning that the traveler/contact will be deleted completely. If *Unlink* is clicked for a traveler/contact that is linked to more than one profile, then a confirmation prompt is presented, advising that the traveler/contact will continue to exist in the other linked profiles.

By click the *Search* button, you can search for a contact that is located in another profile and attach the contact to this profile as well.

TRAVELER/CONTACT RECORD



There are 8 tabs of information in a traveler/contact record - *General, Communications, Addresses, Advanced Contact Info, Cards, Travel Preferences, PNR Entries, and Associated Profiles.* Let's take a look at how to organize information for each contact by going through each field of the add/modify screen.

Notice the header in the Contact record, similar to the header of a profile. It displays Contact Name, Address, Communications, Salutation/Nickname, Relationship/Position, Department, Age, Primary Traveler indicator, Associated Profiles, and Birthday and Expired Credit Card/Passport notification icons.

These two icons in the header are visual alerts of important dates:

A birthday present icon appears during the traveler's birthday month and disappears once the birthday month has passed. A red exclamation point icon appears if the traveler has an expired passport or credit card. Clicking on the exclamation point icon takes the user to Card record if it's an expired credit card, or to the Advanced Traveler Info tab if it's an expired passport. The icon disappears when the expiration date is updated.

GENERAL TAB IN CONTACT RECORD

Position: By choosing from a drop-down menu, these user-definable items can be inserted.

Courtesy Title**:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles.

***First Name*:** Enter the legal first name of the contact in this field. This provides correct information for booking purposes.

Middle Name*: Enter the legal middle name (for international traveling purposes).

***Last Name*:** Enter the legal last name of contact.

Gender*: Select contact gender from the drop-down menu.

Citizenship*: Enter contact's citizenship from the user-definable drop-down menu**.**

***Birthdate**:** Enter contact's birthdate including month, day and year, or any combination of those date fields. (If agent knows only month, enter it - you can query the database by month and send out birthday cards!)

Age: The Age field is auto-calculated based on the entries in the Birthdate fields. To auto-calculate the age, a year must be captured within the Birthdate and calculates based on the current date and the following logic:

- If a year but no month and day is captured, the Age is calculated based on Jan 1st of the birth year.

- If a month and year but no day is captured, the Age is calculated based on the 1st of the birth month and year.

- If a day and year but no month is captured, the Age is calculated based on Jan as the birth month.

Salutation/Nickname: This field allows a salutation or nickname to be entered for each contact. The Salutation/Nickname can be viewed in the Profile Manager results by adding the column to the Query screen.

Department: In profiles, this is a field to enter the contact's department.

Primary Contact: Click here if this is the primary contact for this profile. By default, the box is checked for the contact added to the profile, designating them as Primary. For subsequent contacts added, the box is unchecked by default. If a user checks the box when adding a new contact, making them Primary, the box automatically will be unchecked for the original primary contact. There can be only one Primary Contact per profile.

Remarks: Enter unlimited free-flowing information pertaining to this contact.

COMMUNICATION TAB IN CONTACT RECORD

By using the radio button on the top of the results screen, filter to view only one communications type at a time. Sort communications using the blue arrows on the right side of the screen. *Add, Modify,* or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the contact is linked to more than one profile. In that case, the user is warned, *This contact is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries, as well as the Client Survey report.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

ADDRESS TAB IN CONTACT RECORD

Contacts can only have one address. Contact Address fields were also added to Select Columns and Sort By Columns in Profile Manager query results screens.

Address Line 1: Enter an address line for this contact.

Address Line 2: Enter an additional address line if applicable for this contact.

Apt/Suite: Enter the apartment of suite number.

Zip Code: Enter zip code. This Zip Code entry auto-populates the City and State fields if this is set up in User Defined Fields, as it does in Profile-level addresses.

City: Enter city.

State: Enter state.

Description: Free-flow a description for this address.

Marketing Permission: Contact addresses have their own marketing permission checkbox, which defaults to checked.

ADVANCED CONTACT INFO TAB IN CONTACT RECORD

***Passport Number*:** For up to 2 passports, enter traveler's passport number.

***Expiration*:** Enter contact's passport expiration date. This is a great field to Query on to send out letters alerting customers that passports are about to expire.

Issue Date*: Enter contact's passport issue date.

Issuing City*: Enter contact's passport issuing of origin from the user-definable drop-down menu).

***Issuing Country**:** Enter contact's passport issuing country of origin from the user-definable drop-down menu**.**

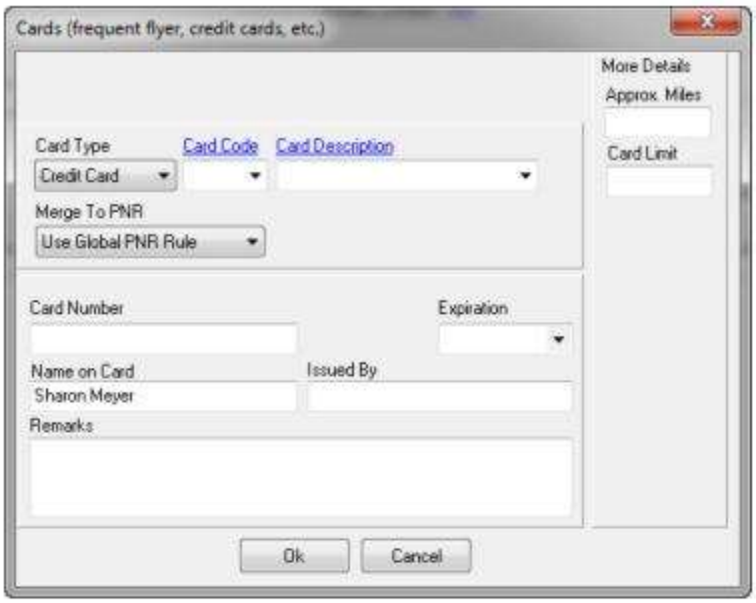
* Heightened security has increased the amount of traveler information agencies need to collect for international travel bookings:

Redress Number/Known Traveler Number: Use this area for TSA numbers assigned to contact.

Emergency Contact: Emergency Contact information includes Name, Phone Number and a Miscellaneous text field to capture any additional information about the emergency contact such as the relationship to the Contact.

CARDS TAB IN CONTACT RECORD

Enter frequent flyer, credit card, cruise program, and miscellaneous card information pertaining to this contact. All cards entered at the contact level also appear within the listing of cards at the profile level. Click *Add* to enter a new card:



Card Type/Card Code/Card Description: Card types are *Credit Card, Frequent Flyer, Hotel Program, Car Program, Car Program, Cruise Program, Other and Discount Card.*

The *Discount Card* in the drop-down list of cards that can be selected in the Cards tab for use with discount programs such as AAA Memberships, AARP, etc. This card type is formatted exactly like all other card types (name, card type, card code, card description, number, expiration, etc.). By entering the *Card Code,* the *Card Description* is auto-filled.

Merge to PNR: By default any new credit card entries default to ***Use Global PNR Rule*.** With this setting credit cards continue to merge as they have in the past based on the global credit card PNR Rule. If this Merge to PNR setting is changed to *Always*, then regardless of the global PNR Rule for credit cards, the credit card defaults to being selected on the Merge to PNR Selection Screen. If this Merge to PNR setting is changed to *Optional*, then regardless of the global PNR Rule for credit cards, the credit card defaults to not being selected on the Merge to PNR Selection Screen. This feature gives you the ability to set the *Always/Optional* setting at the credit card entry level as well as the Global Defaults level.

Card Number/Expiration: Enter the *Card Number* without dashes and use the last day of the month it expires (*Expiration)* in the correct year.

Issued by/Remarks: These are optional fields to put additional data.

Name on Card: The name on the card should default to the contact's name. If someone else's name is on the card, change it here.

Upon saving or editing Credit Card numbers, *ClientBase* validates the card number. Note: Upon saving or edit a credit card number, *ClientBase* now validates the card number. If the number is invalid, a prompt occur: *The credit card number entered appears to have a typographical error or it is not a valid credit card. Do you want to continue saving this record?* This prompt serves as a warning that there may have been a data entry error (typo).

Selecting **YES** saves the card As Is.

Selecting **NO** returns user to the card number field.

When editing an existing card number, validation does not occur unless the card number field is modified. Validation occurs in Profile Cards Tab, Invoice Form of Payment Credit Card and CC Merchant, Invoice Booking Payment Credit Card and CC Merchant, Reservation Payment Due Date tab, Receipt Form of Payment CC Merchant FOP.

***Valid credit card numbers with spaces do not prompt

***Valid credit card numbers with letters (VI1234123412341234) do not prompt

***Valid credit card numbers with expiration date after a slash (CA5458004519231383 /1109) will not prompt (although we do not recommend entering the expiration date in the CardNumber field.)

TRAVEL PREFERENCES TAB IN CONTACT RECORD

Under this tab each travel category appears in a new tree view. Travel Categories are listed in the tree on the left side and Travel Preferences for each are on the right. This gives the ability to capture travel preferences globally by Travel Category, but also the ability to capture travel preferences for each preferred Vendor. It is not mandatory to have preferred preferences for a preferred vendor. It is also not mandatory to select preferred vendors for a client.

Click the Travel Category name to view and/or set up global travel preferences for the category. Preferences set up for the travel category will automatically default as the preferred preference for each preferred vendor selected for that category, however, the vendor preferences can be modified.

To add a preferred vendor, click the *Add* button at the bottom of the Travel Category tree. A *Find Vendor* screen is displayed. Select the Travel Category and the Vendor and click *OK*. Preferences are shown for the vendor based on the default preferences for the Travel Category. Make adjustments to the preferences as needed.

A new field, *Desirability* is available in preferences for future use with *Sabre Graphical Profiles*. The *Desirability* field is displayed when adding or viewing a preferred vendor. Desirability options appear as a drop down to select from. Selections are: *Do Not Use, Dislikes, No Preference, Favorable, and Very Favorable.*

All Travel Categories now use the user defined field Special Options. For Air Preferences, Meal Preferences is named Meal Type which links to a Meal Code field that was also added. Air Craft Type is available as a preference. For Cruise Preferences, Ship Name and Departure Port are available as User Defined fields and are displayed as preference options. When using contact columns in queries, the default global preferences are displayed in the query.

PNR ENTRIES TAB IN CONTACT RECORD

In order to capture contact-related PNR entries (such as general remarks, special meal requests, air/car/hotel preference, UDID's, etc.), a tab is included in the contact record for leisure and corporate client profiles.

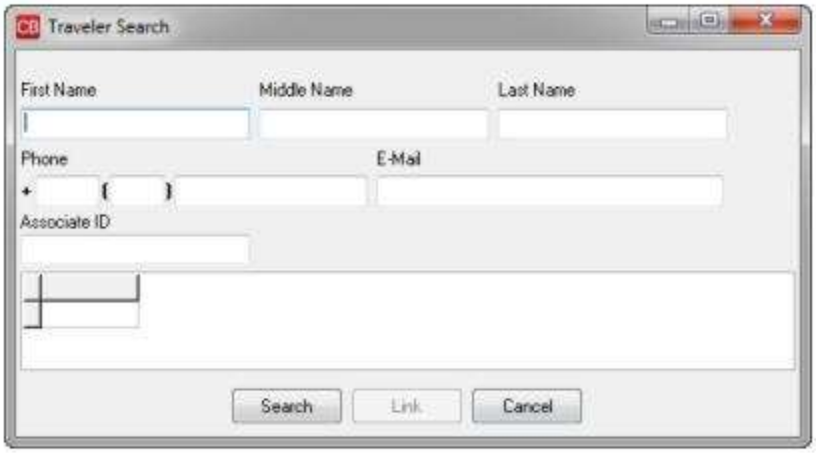
ASSOCIATED PROFILES TAB CONTACT RECORD

This tab allows the user to view all the profiles that a given contact is linked to. By clicking *Open,* user has the ability to hop into another profile.

Linking a Contact Record to Another Profile

In *ClientBase*, you have the ability to link a traveler/contact record to multiple profiles. All data captured within the traveler/contact record is linked to the new profile.

Linking a Traveler/Contact Record:



1) Retrieve the desired profile to which you want to link a traveler/contact record. For example, you may want to link a leisure traveler/contact to this Agent profile.

2) Click the profile Traveler/Contact tab and *Search*.

3) Type in at least 2 pieces of data in the search fields and *Search*.

4) When the traveler/contact result comes up, click *Link*.

5) All the traveler/contact data is now in the new profile.

TIPS: Search by phone or e-mail address alone, or in combination with any of the name fields. If searching by name only, users must enter something in at least two of the three name fields.

Examples:

**User enters First Name of Ken and an e-mail address of ken@example.com. Ken Able, who has that address, is returned; Ken Jones, who does not have that e-mail address, is not.

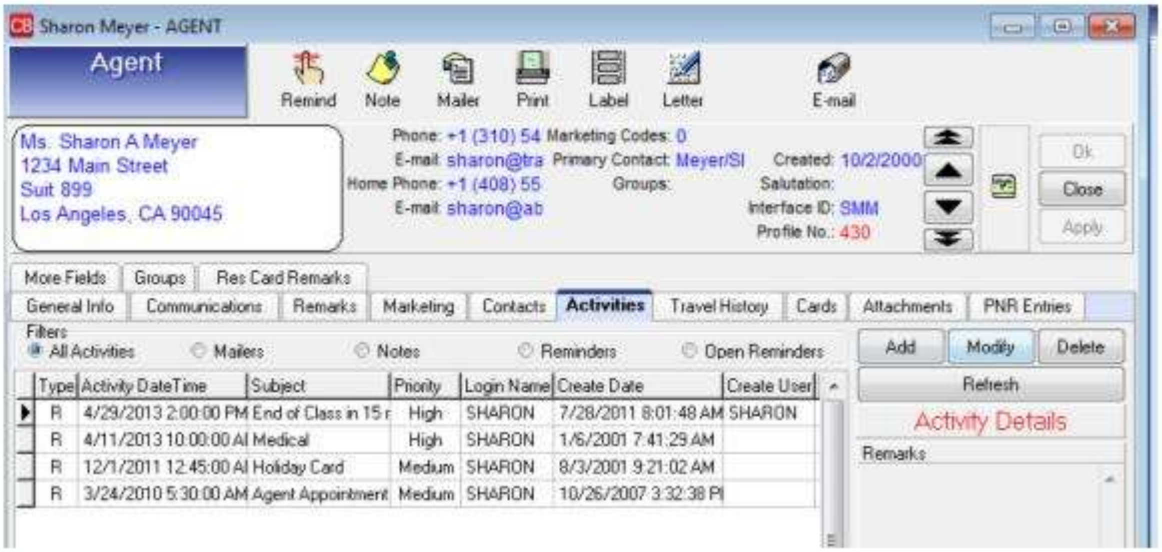
**User knows the last name, but isn't sure exactly how the first name is spelled. He enters First Name A and last name Smith. All Travelers whose first name starts with A (Alice, Anne, Alex,) and last name starts with Smith (Smith, Smith-Jones) are returned.

**User knows that Mary Anne Jones has married, but doesn't remember the Traveler's new last name. She enters First Name Mary and Middle Name Anne. All Travelers with that first and middle name are returned.

**User knows the traveler's phone number and enters (650) 555-1212. All travelers with that phone number are returned.

Activities Tab

Anyone who has permission, can see the history of contacts made with a specific agent by clicking the Activities Tab.



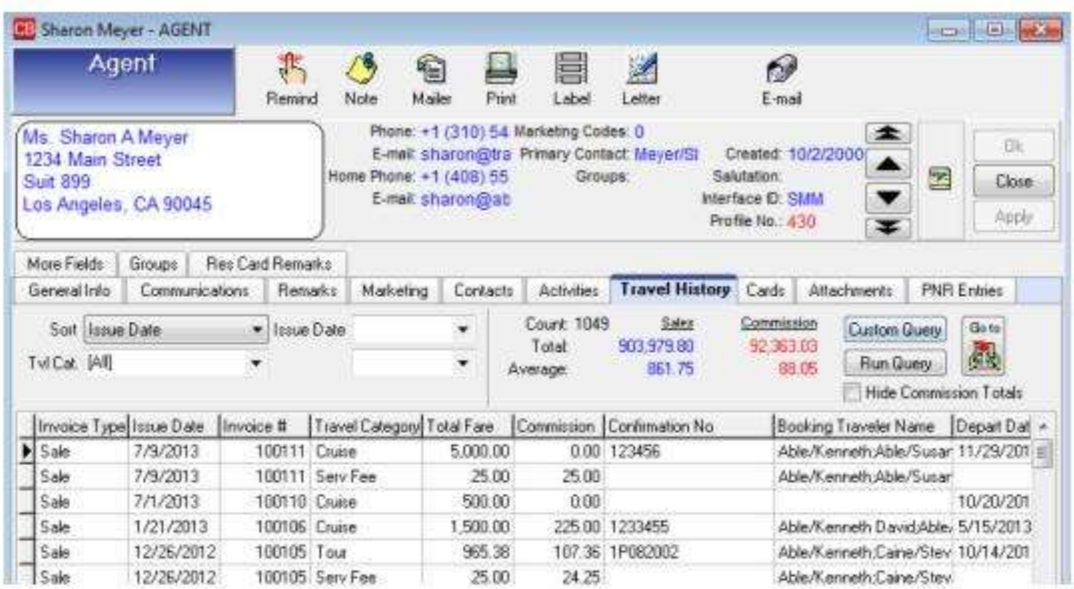
This tab displays a complete history of all contacts associated with this specific agent. Included are Notes (record of interaction with agent), Reminders (record of scheduled past and future activities) and Mailers (record detailing mailings sent to this agent). Users can remind themselves of personal business, such as picking up the laundry, and this appears on the To-Do List in the Activity Manager. A mailer is a tag detailing mailings sent to the agent.

To add a new Note, Reminder or Mailer, click *Add*. To modify or enhance a Note, Reminder or Mailer click *Modify* while the item is highlighted. Click *Delete* while the item is highlighted to remove it.

Notice the radio buttons located directly above the activities results screen. This allows for quick filtering of the results appearing in this tab. By default ALL Activities are displayed, but options for viewing just Mailers, Notes, Reminders, or Open Reminders are available. Also, as you arrow through the various activities appearing in the Activities Tab, the Remarks for each Activity are displayed to the right of the windows just below Activity Details.

Travel History Tab

From this window, agents can easily review past travel purchases which they sold as they appear in TBO or *ClientBase*. They have read-only capabilities only. No information can be altered. The Travel History folder lists invoices created either in TBO or *ClientBase*. This folder performs queries on the shared *ClientBase/Trams Back Office* database and displays invoice/travel history involving this agent. Imagine each agent being able to see the invoices they've issued.



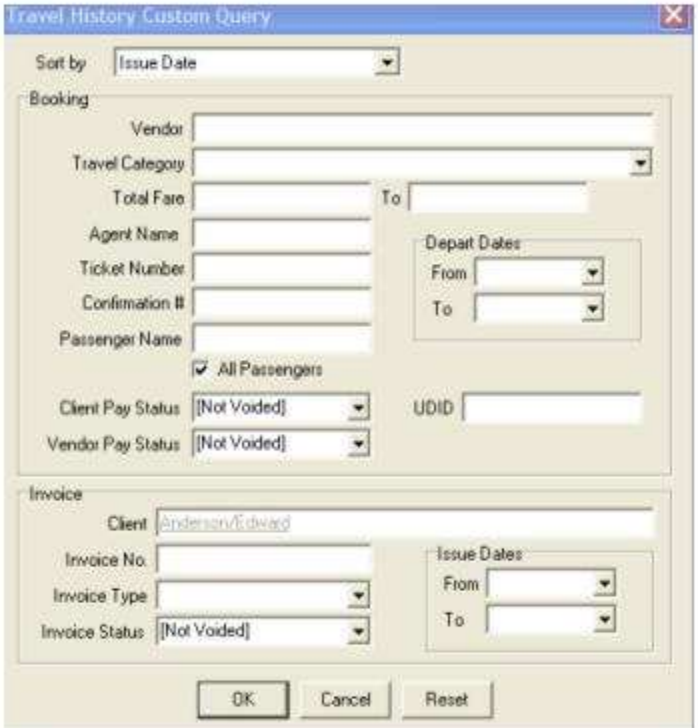
Complete the following fields to obtain specialized queries on invoices:

***Sort*:** Enter the way you want data sorted by using the drop-down menu to select Issue Date, Depart Date, Travel Category, Traveler Name, Agent, Invoice #, Invoice Type, Invoice Status.

Trvl Cat.: Enter the travel category by clicking the drop-down menu.

***Issue Date*:** Enter the From and To Issue Date, by clicking the drop-down menu to access a calendar or enter a date. Click *Run Query* to display the results of the Query.

By clicking *Custom Query*, a more detailed Query can be launched. Query fields include a Sort By Field and the Booking Fields: Vendor, Travel Category, Total Fare Range, Agent Name, Ticket/Confirmation #, Traveler Name and Depart Date Range. Profile fields to Query on include: Client, Invoice No., Invoice Type, Invoice Status, and Issue Sales Date Range:



Hide Commission Totals: By default, this box is unchecked. Once checked, the red Commission numbers in the header are hidden. The checkbox setting is "sticky" - once checked, it remains checked for all profiles until it is unchecked. The Commission column is not hidden; customers who are using this setting may wish to drag that column off to the right in order to conceal it.

Quick Tips: Want to see the payment for a particular invoice quickly? Right-mouse click on the invoice line, and *View Payments for this Invoice number.* Or access the Res Card for the invoice you have selected by clicking the *Go to* button.

Cards Tab

Keep track of the agent's credit cards. Only cards that are not linked to a contact record can be modified or deleted from this profile area. If a user attempts to modify one that is linked to a contact, they will be prompted to continue to the contact record and modify it or delete it from there.

Attachment Tab

To enhance the amount and type of information accessible in a *ClientBase* profile, a feature is included in all profile types so you can attach other files available on your local or network drive to this profiles. These files are referred to as *Attachments*.

To access an attachment at the agent level, click the *Attachment Tab*. Attachments are listed alphabetically by *Description*, and can be sorted from the drop-down menu by *Description, File Name, Directory Path, Computer Name, Original File Source, Compressed Size, File Date/Time, or Modified Date/Time.*

To add a new attachment click *Add*, and *Browse for Attachment* to identity the File Path of the file. The File Path includes the drive where the file is located, any directories or sub-directories, and the name of the file. Choose to compress the file by clicking in the Compression box. Enter a brief description of the attachment, if desired. When retrieving a profile and viewing attachments, the attachments are listed alphabetically by *Description*.

Note: Although these file paths are created from one workstation, they are saved as part of the *ClientBase* database and so accessible from any *ClientBase* workstation.

To view a saved attachment, highlight it, and click *Open Attachment* or double-click on attachment to open. *ClientBase* uses Windows association to view the file type, load the appropriate software, and retrieve the specified file. Every file has an extension (e.g., .doc, .jpg, .bmp, .html, etc.) and must be associated with a specific Windows software program such as MS Word, Paint Shop Pro, Internet Explorer, etc. to be viewed. Although this association is created automatically by Windows when various software programs are installed, if a workstation does not have a software program associated with the type of file an attachment is pointing to, then the file cannot be viewed from the attachment created in *ClientBase*.

Modifications to a file launched from *ClientBase* attachments can be saved automatically back into *ClientBase*. If an attachment is opened and then modified and saved, upon closing the attachment you land on the attachment settings window. Clicking *OK* from this area saves the newly modified file back to *ClientBase*. Click *Delete*, while the name is highlighted, to remove an attachment. *Save As Attachment* allows you to save a copy of the attachment into another file location.

How to Set Up User Level Logos in Headers/Footers

Logos can be added to Headers and Footers at the user level for use on Invoices, Itineraries, Trip Proposals, Trip Statements and Receipts. Some agencies have the need for an agent to have his or her own unique branding to appear on Invoice, Statements, etc. (such as agents that are Independent Contractors). To use the agent logo feature, it is necessary to add the agent's logo to the Agent's profile and to add the *Primary Agent Logo* merge field to Headers and Footers.

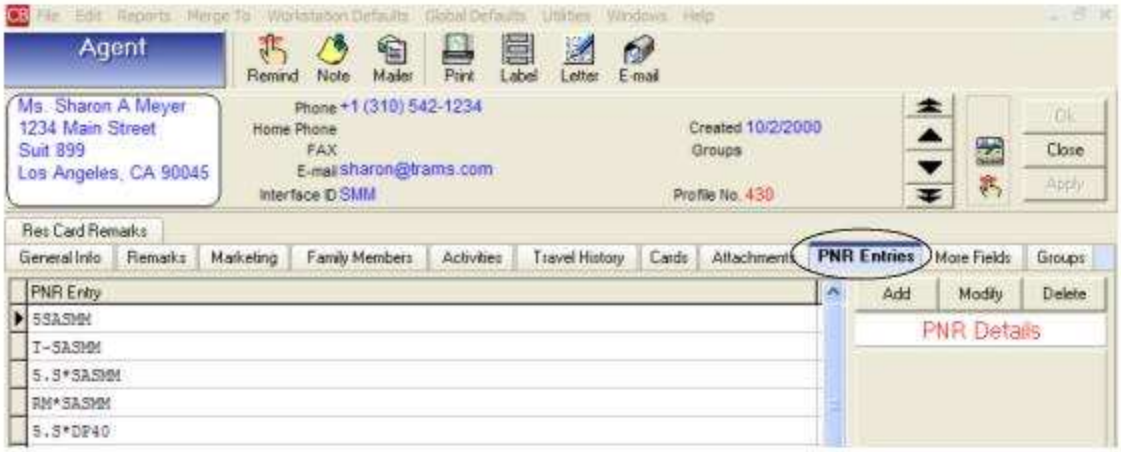
Next, query and select the agent profile, click the Attachments tab and *Add*. There are two Attachment Types of Logo and General (for attachments other than logos). Select Logo, then Browse for Attachment and select the agent's logo image. Agent's logo image must be a *.jpg, *.jpeg, *.bmp, *.ico, or *.emf type graphic file. Make sure it's the correct size before you import it. Complete the Description field and click OK to save.

After saving the agent logo, select the desired Header and Footer (Invoice, Trip Proposal, Receipt, etc.). Double-click on the global logo image to open the Picture Designer.

Do not change the current logo image. Click the down arrow on the *Merge Field*, select Primary Agent Logo from the drop down and click OK to save. Repeat these steps to add the Primary Agent Logo merge field to each Header and Footer (Invoice, Trip Proposal, Receipt, etc.).

If a logo exists in the Agent Profile, that logo is merged on to the document as long as the Primary Agent Logo merge field is in the Header and Footer. If no logo exists in the Agent Profile, or if the agent's user login does not have an assigned Agent Profile, the agency's usual Header and Footer is used (Branch level or the Global level).

PNR Entries Tab



A PNR Entry table is available at the agent profile level so that you can format miscellaneous remarks for this agent and then seamlessly paste them into a PNR. PNR Entry tables are also included at the branch, client and traveler levels. Agent profiles can be identified within their User Login record. By default the User Login Agent's PNR Entries are included when using the Merge to PNR feature in *ClientBase*.

***CRS*: Choose the GDS system from the drop-down menu.

***Description of Entry*: Enter a free-flow "Description" field.

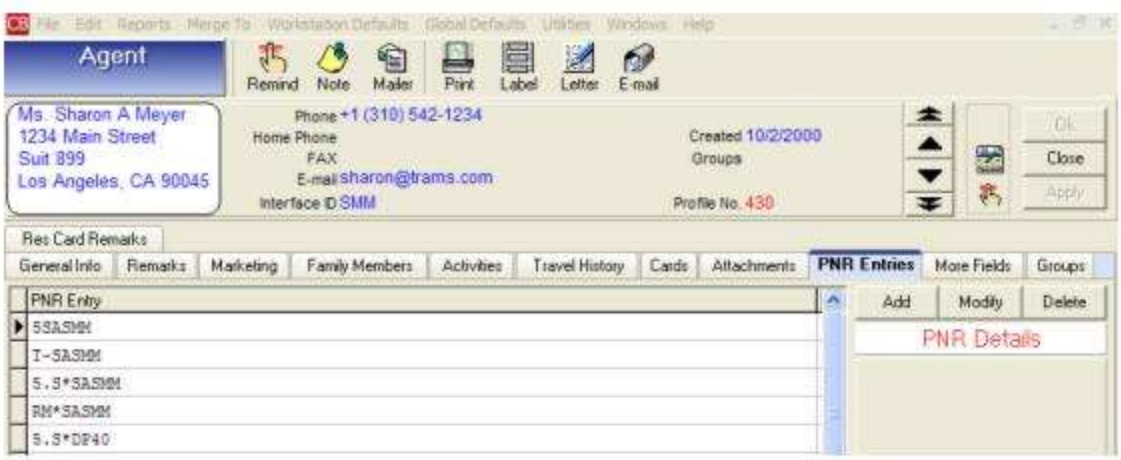
***Always Move this Entry*: By checking this box, the entry always moves when you do a move to the PNR. If this box is not checked, you'll have the option of moving the entry whenever you want.

***Assign Name Field Position*: When checked, automatically attaches the traveler's name position at the end of the PNR entry (e.g. 3SSRVGML-1.2).

***Display on Selection Screen*: Within each PNR Entry or PNR Rule that is set as *Always Move This Rule*, an option is included called Display on Selection 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.

***PNR*: Enter the PNR entry the way you would in your reservation system and press OK to save. For more information on moving data from *ClientBase* to your CRS PNR, please refer to the chapter, *Putting Your Profiles to Work for You.*

More Fields Tab



To track information in an agent profile that *ClientBase* doesn't provide a field for, this is where you can create your own customized fields of information. Things like special membership numbers, agent certification, and other miscellaneous information can be captured in these fields.

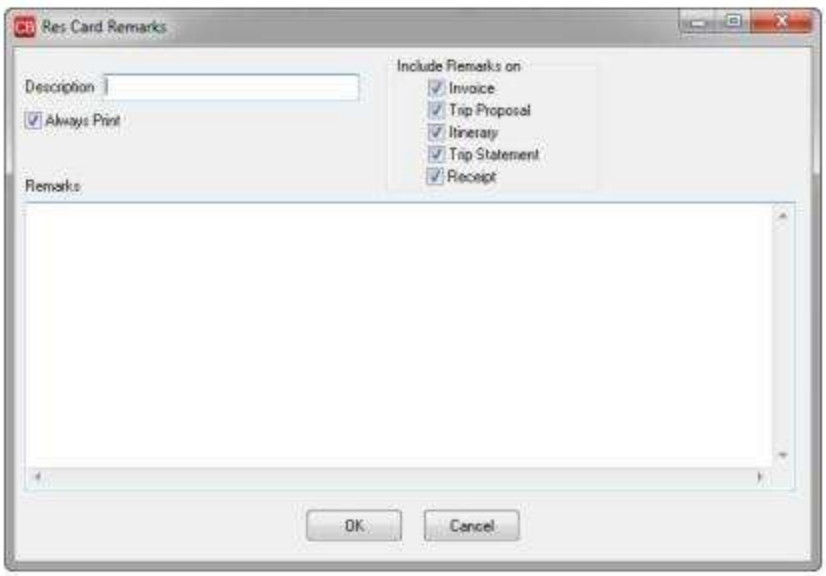
Setup the fields to customize by going to **Global Defaults|Profile Defaults|More Field Categories**. After setting up the customized fields (and the drop down, in **Global Defaults|General Setup|User Defined Fields|More Field Items**), enter the appropriate items the More Fields tab.

Groups Tab

Profiles may be associated with a specific group that has been created by the agency. There is no limit to how many groups one profile may be associated with. Enter a group(s) to which this agent belongs by clicking the drop-down menu item after clicking *Add*. This group table is shared with *Trams Back Office*. Customize these items by going to **Global Defaults|General Setup|User Defined Fields|Groups: Agent**, or by clicking the blue field label. To add a new group to the agent's profile, click *Add*. To modify or enhance an group, click *Modify* while the group is highlighted. Click *Delete* while the group is highlighted to remove it.

Res Card Remarks Tab

Whenever an invoice, itinerary, trip proposal, trip statement or receipt is issued for this agent enter agent level Res Card Remarks to print accordingly. Click *Add* and complete following fields:



Description: Enter a brief 15 character description of the Remark.

Always Print: Place a check here if you would like these remarks to print by default. Leave this field unchecked if you would like to force the user to select this remark to print at the time of printing the document.

Include Remarks On: Create different remarks for different documents. Select which document you would like to include this remark by placing a check within *Invoice, Trip Proposal, Itinerary, Trip Statement* or *Receipt*.

Remarks: Enter your free flow remarks here. There is no limit to the number of characters.

Add multiple remarks for each profile and arrange the desired ordered by highlighting a remark from the listing and clicking the blue arrows to move it up or down in position.

Click *OK* to Save.

Chapter 19: An In-Depth Look at Other Profiles

This chapter familiarizes you with how to setup, maintain and use Other Profiles.

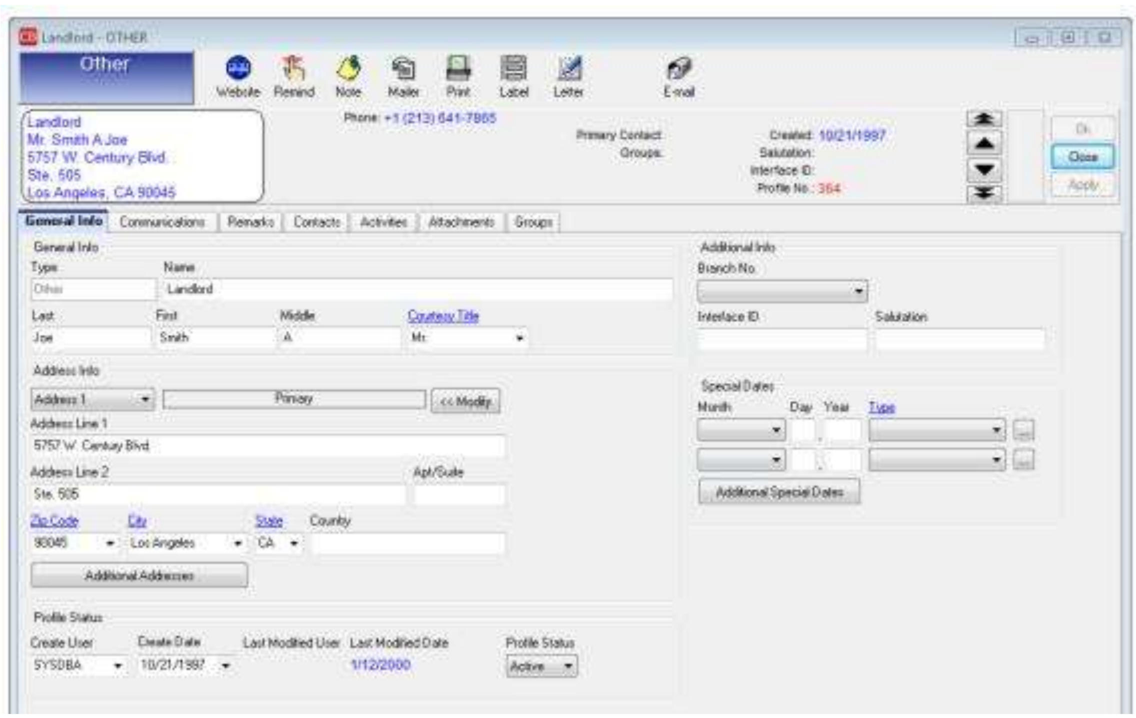
Introduction

Other profiles are used for gathering information and maintaining histories on individuals and companies that do not fit into one of the other profile categories. They are not leisure or corporate customers, vendors, or agents but are non-travel related individuals and companies with whom you do business. The landlord, bank, utility companies, insurance provider and printing company are all examples of “other” profiles.

Why would you want to collect information on other profiles? When these profiles are carefully maintained, you always have current information for billing purposes and running labels. When you need help or a special favor from one of these entities, it is always helpful to have the name of the contact person handy.

Anatomy of an Other Profile

Other profiles in *ClientBase* store an unlimited amount of information about your other contacts. To organize all this information and make it easily accessible to all agents, each profile is made up of seven key areas (Toolbar, Header Info, Scrolling Arrows, Control Buttons, Information Tabs, and User-Defined Fields).



Let’s explore each of these seven key areas:

Toolbar

Website: If you have entered a website for this profile and made it *Primary* under *Website* (in the communication area), you can launch the website, by clicking on this icon on the toolbar.

Create a Reminder: Click *Remind* to create a Reminder for the other entity. An other reminder might be to pay the rent early this month. Fill in the date you wish to be reminded, set the priority, reminder type, set an optional alarm and finally type in some free-flowing remarks for reference. There is an option to mark this Reminder “Private” so that only the creation agent or SYSDBA can view it. This Reminder appears on queries in the activity manager or reports.

Create a Note: Click *Note* to create an note documenting contacts you have with an other entity. By entering the date, time, and subject of the contact, a history of contacts is created which appears in the activity manager or reports.

Create a Mailer: Click *Mailer* to create a mailer documenting mailings sent to an Other entity. By entering the date, time, and subject of the mailer, a history of mailers is created which appears in the activity manager or reports.

Print: Click *Print* to print out details of the other profile.

Merge to Label: Click *Label* to create a label for the other profile.

Merge to Document Template: Click *Letter* to merge other name and address to any letter contained in the document templates. The letter can be customized if desired by the user for a personalized touch.

Merge to E-mail: Click *E-mail* to merge the primary e-mail address for this other profile into a e-mail screen. Complete the e-mail.

Header Information

The header conveniently displays pertinent information such as primary address and primary communication information (telephone number, fax, website and e-mail addresses), Primary Contact, Groups, Created date, Salutation, Interface ID, and Profile No. Frequently confirm the accuracy of this information to ensure data is always up-to-date. Clicking any field label (including address info) in the header automatically jumps you to that field for quick edits.

Scrolling Arrows

The four black arrows provides navigation to move among the profiles included within the current Query in the results screen.

Profile Indicator

An indicator to the right of the arrows appears if an open Reminder alerts you that some future action is scheduled to take place.

Control Buttons

Close: Takes you out of the profile and only appears if there are no unsaved changes made to the profile.

O.K.: Saves any information that has been added, modified or deleted and exits the profile.

Apply: Saves any information that has been added, modified or deleted and keeps you in the profile.

Cancel: Appears only if the profile has changes that have not been saved, abandons those changes and then exits the profile.

Information Tabs

Each other profile contains the following information tabs: ***General Info, Communications, Remarks, Contact, Activities, Attachments, and Groups.*** The section below, *Detailed Review of Folders*, describes each tab in detail.

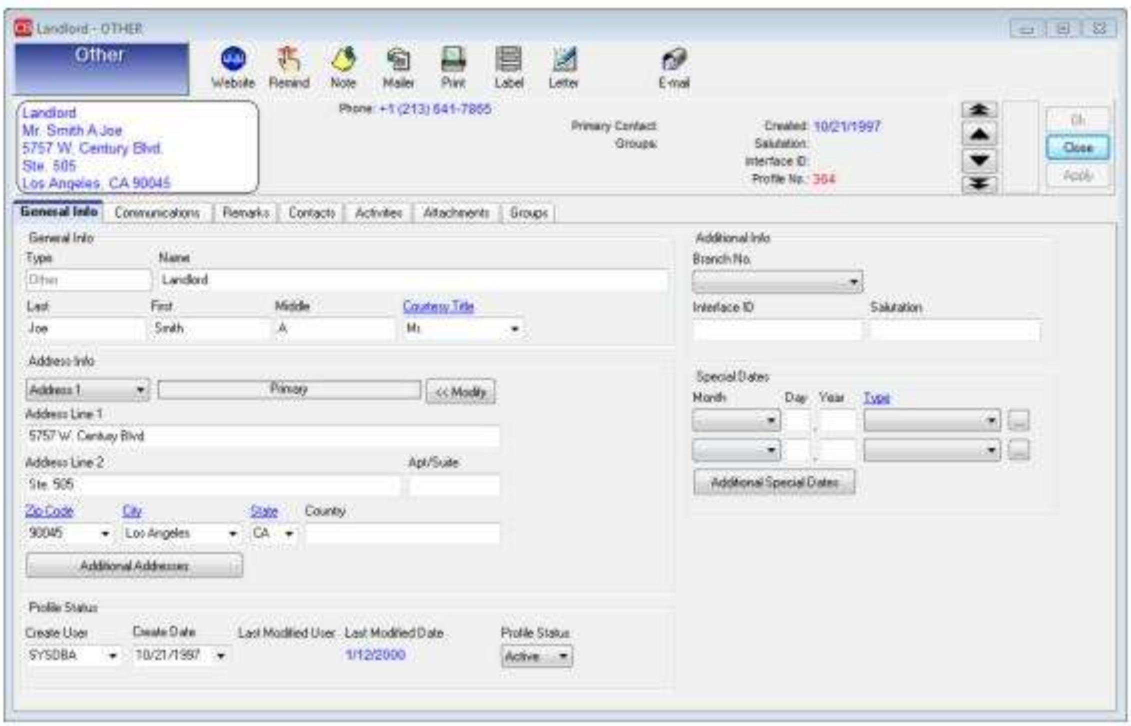
User-Defined Fields

There are many fields in other profiles that can be customized for agency use. While data entry fields are usually labeled in black, user-defined fields stand out because they are labeled in blue. If you have permission, double-click on the blue label or go to **Global Defaults|General Setup|User Defined Fields**, to add, modify, or delete these field items for use by agents in the form of drop-down menus.

Detailed Review of Other Folders

General Info Tab

The General Information folder displays other information.



Use the <Tab> key to move from field to field and <Shift><Tab> to move backwards from field to field; or use your mouse and click the desired field to enter data. The following fields are in the General Information folder:

Type: This field defaults to other.

Name: Enter the name of other profile. Any printed reports or labels include the *Other* name entered in the General Info folder.

Last Name**:** Enter the last name of primary contact.

First Name**:** Enter the first name of the primary contact.

Middle**:** Enter the middle name of the Primary Contact.

Courtesy Title**:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. The drop-down menu allows you to select from a lengthy standardized list. This courtesy title is printed on mail labels.

Address 1, Address 2: A vendor profile includes an unlimited number of addresses designated as Primary, Bill To, Ship To, Second Address and Alternate Address. Only one address though may be assigned as Primary, Bill To, or Ship To.

Assuming the address to be captured is the default type of *Primary, Bill To* and *Ship To*, then the address fields of *Address Line 1*, *Address Line 2*, *Apt/Suite, Zip Code, City, State* and *Country* can be entered right from the main screen. To capture additional address entries, such as a second address or alternate address, click *Additional Addresses*.

Apt/Suite: Enter the appropriate unit number.

City/State/Zip: Enter the city/state/zip data. These fields can be customized by going to **Global Defaults|General Setup|User Defined Fields|City/State/Zip** or click on the blue field label.

PROFILE STATUS

Create Date/Create User: These fields default to the system date and the user logged in at the time the profile is created. Both can be modified, but can be disabled by the database administrator. Agencies use this field to query for new customers so that “Welcome to the Agency" letters can be mailed. These fields can also be used to query for management reports reflecting user productivity in creating new client profiles.

Last Modified User/Last Modified Date: This area indicates the last time a profile was modified and by whom.

Profile Status: Indicate whether a customer profile is active or inactive by choosing from the drop-down menu. By default all profiles start with an active status. An inactive status has been included, since you cannot delete a profile that has invoices and payments attached. When querying, only profiles marked as active are included in the search, but you can perform a Level 2 search to view inactive profiles.

ADDITIONAL INFO

Branch No.: For agencies with multiple branches, enter the branch number (if applicable) from the drop-down menu.

***Interface ID*:** N/A.

Salutation: The name used to greet the contact; for example, if Mr. Henry Wilkenson likes to be called “Hank,” enter *Hank* in this field. If Mrs. Emily Anderson likes to be called “Mrs. Anderson,” enter *Mrs. Anderson* in this field.

SPECIAL DATES

These fields are particularly useful to record unique dates for each specific customer. Enter the day/month/year (or any combination of these date fields) of the special date and choose the type by clicking the drop-down menu. Items in this list can be customized by going to **Global Defaults|General Setup|User Defined Fields|Special Dates**, or click on the blue label in the profile. Imagine the marketing possibilities when several months before an anniversary or vacation time, your agency suggests as a gift a trip reflecting the client’s preferences. By clicking *Additional Special Dates*, unlimited dates can be added.

Communications Tab

If you were on a previous version of ClientBase, communications have been moved out of the General Info tab of the Contact record into its own tab. The Primary Phone, Primary E-mail, Primary Fax, and Primary Web are now displayed in the list of Contacts on the Contacts tab in the profile. The first Communication entry of a given type is marked as the Contact's Primary (Primary box checked). Subsequent communication entries of that type default to unchecked.

By using the radio button on the top of the results screen, users can filter to view only one communications type at a time. Profile-level communication entries are displayed first, followed by the communications that are assigned to contacts. Contact communications are in the order that the contacts are listed in the Contacts tab. Profile level communications can be sorted using the blue arrows on the right side of the screen. These arrows are disabled when a Contact communication entry is selected.

Add, Modify, or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the Contact is linked to more than one profile. In that case, the user is warned, *This traveler is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Contact: Select the name of the contact from the drop-down. When adding a communication entry from the Contact level, there is no option to change the contact name by drop-down.

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

Need to copy a communication's entry? Right-click on the entry and select *Copy Phone, Copy E-Mail,* or *Copy Fax.* Then paste the entry into other applications as needed.

Remarks Tab

The Remarks folder provides a full-page view of the unlimited remarks and provides tremendous flexibility for entering comments into the other profile. The only limitation in the *Remarks* folder is the amount of available disk space. View any miscellaneous comments from this screen. A mini-word processor is available from this area allowing an agency to customize free-flowing remarks:

Contacts Tab

The ***Contact*** folder is designed for detailed information on specific individuals who are key contacts within a profile. The blue up-and-down arrows allow re-ordering the list of Contacts. Other profiles have a "Reset Sorting" button which returns the list to alphabetical order. By highlighting a particular contact, you'll be able to see any remarks entered in the contact record.

Add a new traveler/contact by clicking *Add*. When a user adds a new contact record, the database is first automatically searched for any existing travelers/contacts that match. If a match is found, the user can select the existing contact from the list presented and click *Link* to link the existing traveler/contact. They may also click *Cancel* to return to their new traveler/contact.

When clicking *OK* again, the new traveler/contact is created. Any data that was entered while creating the new traveler/contact that did not exist in the linked traveler/contact record will be transferred.

Example: An agent enters a passport number when entering a new traveler/contact. The agent clicks OK, and search finds an existing traveler/contact record, but the existing record does not have a passport number. When the agent selects the matching traveler/contact record, and data from the traveler/contact record is populated on the screen, the passport information that was missing is now completed also.

Conversely: If data was entered and the existing traveler/contact record contains information in that field, the existing traveler/contact data is retained. *Example:* Agent enters First Name, Last Name, and a birthdate of July 1, 1960, and then clicks OK. The traveler/contact Search results screen appears, and the agent decides to select one of the existing traveler/contact records. The existing traveler has a birthdate of April 12, 1965. The existing birthdate information overwrites the one the agent entered. (Users can always go back and edit if the original information was incorrect.)

To modify or enhance a contact, click *Modify* while the name is highlighted. If *Unlink* is clicked for a traveler/contact that is not linked to any other profiles, then a prompt is presented warning that the traveler/contact will be deleted completely. If *Unlink* is clicked for a traveler/contact that is linked to more than one profile, then a confirmation prompt is presented, advising that the traveler/contact will continue to exist in the other linked profiles.

By click the *Search* button, you can search for a contact that is located in another profile and attach the contact to this profile as well.

TRAVELER/CONTACT RECORD

There are 8 tabs of information in a traveler/contact record - *General, Communications, Addresses, Advanced Contact Info, Cards, Travel Preferences, PNR Entries, and Associated Profiles.* Let's take a look at how to organize information for each contact by going through each field of the add/modify screen.

Notice the header in the Contact record, similar to the header of a profile. It displays Contact Name, Address, Communications, Salutation/Nickname, Relationship/Position, Department, Age, Primary Traveler indicator, Associated Profiles, and Birthday and Expired Credit Card/Passport notification icons.

These two icons in the header are visual alerts of important dates:

A birthday present icon appears during the contact's birthday month and disappears once the birthday month has passed. A red exclamation point icon appears if the traveler has an expired passport or credit card. Clicking on the exclamation point icon takes the user to Card record if it's an expired credit card, or to the Advanced Traveler Info tab if it's an expired passport. The icon disappears when the expiration date is updated.

GENERAL TAB IN CONTACT RECORD

Position: By choosing from a drop-down menu, these user-definable items can be inserted.

Courtesy Title**:** Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles.

First Name**:** Enter the legal first name of the contact in this field. This provides correct information for booking purposes.

Middle Name*: Enter the legal middle name (for international traveling purposes).

Last Name**:** Enter the legal last name of contact.

Gender*: Select contact gender from the drop-down menu.

Citizenship*: Enter contact's citizenship from the user-definable drop-down menu**.**

Birthdate*: Enter contact's birthdate including month, day and year, or any combination of those date fields. (If agent knows only month, enter it - you can query the database by month and send out birthday cards!)

Age: The Age field is auto-calculated based on the entries in the Birthdate fields. To auto-calculate the age, a year must be captured within the Birthdate and calculates based on the current date and the following logic:

- If a year but no month and day is captured, the Age is calculated based on Jan 1st of the birth year.

- If a month and year but no day is captured, the Age is calculated based on the 1st of the birth month and year.

- If a day and year but no month is captured, the Age is calculated based on Jan as the birth month.

Salutation/Nickname: This field allows a salutation or nickname to be entered for each contact. The Salutation/Nickname can be viewed in the Profile Manager results by adding the column to the Query screen.

Department: In profiles, this is a field to enter the contact's department.

Primary Contact: Click here if this is the primary contact for this profile. By default, the box is checked for the contact added to the profile, designating them as Primary. For subsequent contacts added, the box is unchecked by default. If a user checks the box when adding a new contact, making them Primary, the box automatically will be unchecked for the original primary contact. There can be only one Primary Contact per profile.

Remarks: Enter unlimited free-flowing information pertaining to this contact.

COMMUNICATION TAB IN CONTACT RECORD

By using the radio button on the top of the results screen, filter to view only one communications type at a time. Sort communications using the blue arrows on the right side of the screen. *Add, Modify,* or *Delete* a communication entry. Deleting a communication entry works the same as before, unless the contact is linked to more than one profile. In that case, the user is warned, *This contact is associated with multiple profiles. Deleting this communication will remove entry from those profiles also. Delete?*

ADDING A COMMUNICATION ENTRY

Click *Add* to start:

Type: From the drop-down select the communication type - *Phone, Fax, E-mail, Web Site, Facebook, Twitter, LinkedIn, or Google+. (*The standardized format for telephone, fax, e-mail and website entries in *ClientBase* provides a platform upon which these numbers can be quickly moved among toolbar icons such as merging to e-mail, or merge to PNR.)

Each *phone* entry has a forced canonical country code and area code for the benefits of standardization described above. The prefix and suffix fields of the phone number field remain free-flow to accommodate foreign numbers. Maintain a default country code and area code in **Global Defaults|Profile Defaults |Communication Defaults**. When entering new phone entries, if the country code and area code is not completed, the system defaults to the country code and area code in the Global Defaults.

Example Formats for capturing user's social media information:

Facebook: For a profile - facebook.com/username (facebook.com/JohnSmith); For a page - facebook.com/page name (facebook.com/SabreTravel)

Twitter: Twitter.com/username (Twitter.com/JohnSmith)

Linked In: linkedin.com/pub/8/b8a/205

(Numerical string in the URL is the Linked In ID)

Google Plus: plus.google.com/117474227900375467167

(Numerical string in the URL is the Google+ ID)

Just like all other communication types, social media communication types have a Marketing Permission checkbox. Marketing Permission is checked by default.

The social media Communication Types are in the Level 2 and Level 3 queries, as well as the Client Survey report.

Primary: One entry for each of these types can be designated as primary. Though an unlimited number of entries can be stored and viewed, the primary entries are marked with an asterisk on the main screen and included in export routines and used for merge to e-mail.

Marketing Permission: All current e-mail addresses within the database default to this field being checked if setup by the database administrator in **Global Defaults|Profile Defaults|Communication Defaults**. On an e-mail entry by e-mail entry basis, choose to leave it checked or unchecked. This marketing permission checkbox is accessible through the global modify feature. So if you want the existing e-mail entries to have this permission marketing field unchecked, use global modify.

Invalid: This area is for use by a marketing organization or marketing person within the agency that has received something back as undeliverable. Rather than deleting the address or e-mail entirely from the database without the proper research, the marketing person can check the Invalid box signaling the fact that the agent should look into this further, but leaves it to the agent to determine how to update. Level 2 and Level 3 Profile Manager Queries have been updated to include the ability to filter profiles based on this address or e-mail Invalid status. Agencies should use these queries periodically to see if they have any Invalid addresses or e-mails that need updating. In the meantime, any addresses and e-mails with this Invalid setting will still be included in all Merge To features and reports.

ADDRESS TAB IN CONTACT RECORD

Contacts can only have one address. Contact Address fields were also added to Select Columns and Sort By Columns in Profile Manager query results screens.

Address Line 1: Enter an address line for this contact.

Address Line 2: Enter an additional address line if applicable for this contact.

Apt/Suite: Enter the apartment of suite number.

Zip Code: Enter zip code. This Zip Code entry auto-populates the City and State fields if this is set up in User Defined Fields, as it does in Profile-level addresses.

City: Enter city.

State: Enter state.

Description: Free-flow a description for this address.

Marketing Permission: Contact addresses have their own marketing permission checkbox, which defaults to checked.

ADVANCED CONTACT INFO TAB IN CONTACT RECORD

Passport Number**:** For up to 2 passports, enter traveler's passport number.

Expiration**:** Enter contact's passport expiration date. This is a great field to Query on to send out letters alerting customers that passports are about to expire.

Issue Date*: Enter contact's passport issue date.

Issuing City*: Enter contact's passport issuing of origin from the user-definable drop-down menu).

Issuing Country*:** Enter contact's passport issuing country of origin from the user-definable drop-down menu**.**

* Heightened security has increased the amount of traveler information agencies need to collect for international travel bookings:

Redress Number/Known Traveler Number: Use this area for TSA numbers assigned to contact.

Emergency Contact: Emergency Contact information includes Name, Phone Number and a Miscellaneous text field to capture any additional information about the emergency contact such as the relationship to the Contact.

CARDS TAB IN CONTACT RECORD

Enter frequent flyer, credit card, cruise program, and miscellaneous card information pertaining to this contact. All cards entered at the contact level also appear within the listing of cards at the profile level. Click *Add* to enter a new card:

Card Type/Card Code/Card Description: Card types are *Credit Card, Frequent Flyer, Hotel Program, Car Program, Car Program, Cruise Program, Other and Discount Card.*

The *Discount Card* in the drop-down list of cards that can be selected in the Cards tab for use with discount programs such as AAA Memberships, AARP, etc. This card type is formatted exactly like all other card types (name, card type, card code, card description, number, expiration, etc.). By entering the *Card Code,* the *Card Description* is auto-filled.

Merge to PNR: By default any new credit card entries default to ***Use Global PNR Rule*****.** With this setting credit cards continue to merge as they have in the past based on the global credit card PNR Rule. If this Merge to PNR setting is changed to *Always*, then regardless of the global PNR Rule for credit cards, the credit card defaults to being selected on the Merge to PNR Selection Screen. If this Merge to PNR setting is changed to *Optional*, then regardless of the global PNR Rule for credit cards, the credit card defaults to not being selected on the Merge to PNR Selection Screen. This feature gives you the ability to set the *Always/Optional* setting at the credit card entry level as well as the Global Defaults level.

Card Number/Expiration: Enter the *Card Number* without dashes and use the last day of the month it expires (*Expiration)* in the correct year.

Issued by/Remarks: These are optional fields to put additional data.

Name on Card: The name on the card should default to the contact's name. If someone else's name is on the card, change it here.

Upon saving or editing Credit Card numbers, *ClientBase* validates the card number. Note: Upon saving or edit a credit card number, *ClientBase* now validates the card number. If the number is invalid, a prompt occur: *The credit card number entered appears to have a typographical error or it is not a valid credit card. Do you want to continue saving this record?* This prompt serves as a warning that there may have been a data entry error (typo).

Selecting **YES** saves the card As Is.

Selecting **NO** returns user to the card number field.

When editing an existing card number, validation does not occur unless the card number field is modified. Validation occurs in Profile Cards Tab, Invoice Form of Payment Credit Card and CC Merchant, Invoice Booking Payment Credit Card and CC Merchant, Reservation Payment Due Date tab, Receipt Form of Payment CC Merchant FOP.

***Valid credit card numbers with spaces do not prompt

***Valid credit card numbers with letters (VI1234123412341234) do not prompt

***Valid credit card numbers with expiration date after a slash (CA5458004519231383 /1109) will not prompt (although we do not recommend entering the expiration date in the CardNumber field.)

TRAVEL PREFERENCES TAB IN CONTACT RECORD

Under this tab each travel category appears in a new tree view. Travel Categories are listed in the tree on the left side and Travel Preferences for each are on the right. This gives the ability to capture travel preferences globally by Travel Category, but also the ability to capture travel preferences for each preferred Vendor. It is not mandatory to have preferred preferences for a preferred vendor. It is also not mandatory to select preferred vendors for a client.

Click the Travel Category name to view and/or set up global travel preferences for the category. Preferences set up for the travel category will automatically default as the preferred preference for each preferred vendor selected for that category, however, the vendor preferences can be modified.

To add a preferred vendor, click the *Add* button at the bottom of the Travel Category tree. A *Find Vendor* screen is displayed. Select the Travel Category and the Vendor and click *OK*. Preferences are shown for the vendor based on the default preferences for the Travel Category. Make adjustments to the preferences as needed.

A new field, *Desirability* is available in preferences for future use with *Sabre Graphical Profiles*. The *Desirability* field is displayed when adding or viewing a preferred vendor. Desirability options appear as a drop down to select from. Selections are: *Do Not Use, Dislikes, No Preference, Favorable, and Very Favorable.*

All Travel Categories now use the user defined field Special Options. For Air Preferences, Meal Preferences is named Meal Type which links to a Meal Code field that was also added. Air Craft Type is available as a preference. For Cruise Preferences, Ship Name and Departure Port are available as User Defined fields and are displayed as preference options. When using contact columns in queries, the default global preferences are displayed in the query.

PNR ENTRIES TAB IN CONTACT RECORD

In order to capture contact-related PNR entries (such as general remarks, special meal requests, air/car/hotel preference, UDID's, etc.), a tab is included in the contact record for leisure and corporate client profiles.

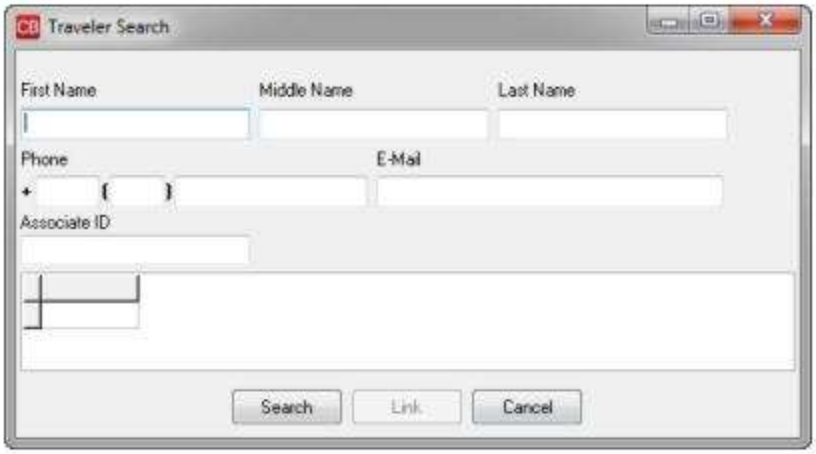
ASSOCIATED PROFILES TAB CONTACT RECORD

This tab allows the user to view all the profiles that a given contact is linked to. By clicking *Open,* user has the ability to hop into another profile.

Linking a Contact Record to Another Profile

In *ClientBase*, you have the ability to link a traveler/contact record to multiple profiles. All data captured within the traveler/contact record is linked to the new profile.

Linking a Traveler/Contact Record:



1) Retrieve the desired profile to which you want to link a traveler/contact record. For example, you may want to link a leisure traveler/contact to a Corporate profile.

2) Click the profile Traveler/Contact tab and *Search*.

3) Type in at least 2 pieces of data in the search fields and *Search*.

4) When the traveler/contact result comes up, click *Link*.

5) All the traveler/contact data is now in the new profile.

TIPS: Search by phone or e-mail address alone, or in combination with any of the name fields. If searching by name only, users must enter something in at least two of the three name fields.

Examples:

**User enters First Name of Ken and an e-mail address of ken@example.com. Ken Able, who has that address, is returned; Ken Jones, who does not have that e-mail address, is not.

**User knows the last name, but isn't sure exactly how the first name is spelled. He enters First Name A and last name Smith. All Travelers whose first name starts with A (Alice, Anne, Alex,) and last name starts with Smith (Smith, Smith-Jones) are returned.

**User knows that Mary Anne Jones has married, but doesn't remember the Traveler's new last name. She enters First Name Mary and Middle Name Anne. All Travelers with that first and middle name are returned.

**User knows the traveler's phone number and enters (650) 555-1212. All travelers with that phone number are returned.

Activities Tab

Anyone who has permission can see the history of notes, mailers, or reminders made with a specific other profile by clicking the Activities Tab.

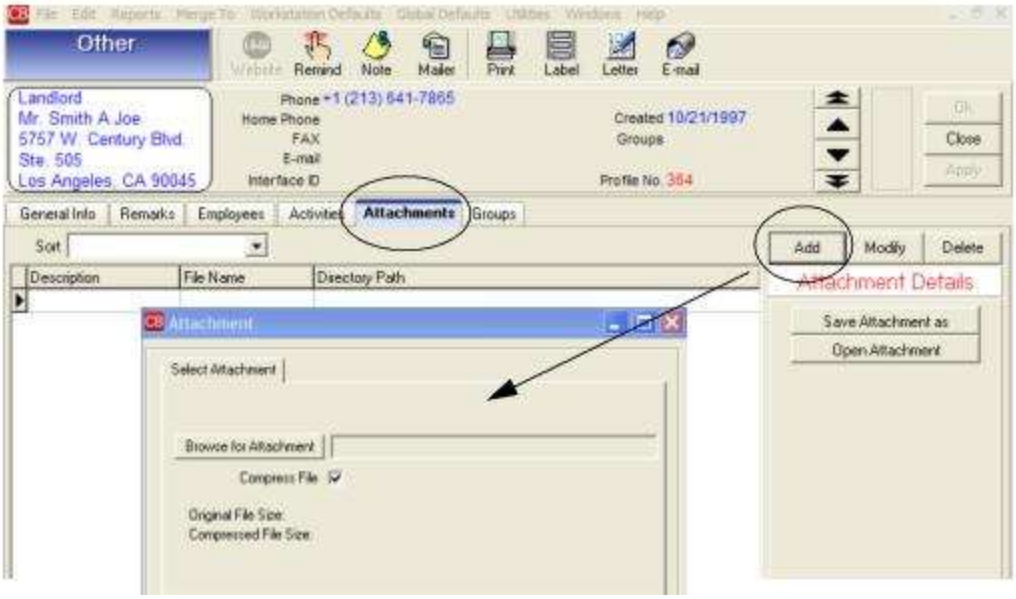
This tab displays a complete history of all contacts associated with this specific client. Included are Notes (record of interaction with client), Reminders (record of scheduled past and future activities) and Mailers (record detailing mailings sent to this client). To add a new Note, Reminder or Mailer, click *Add*. To modify or enhance a Note, Reminder or Mailer click *Modify* while the item is highlighted. Click *Delete* while the item is highlighted to remove it.

Notice the radio buttons located directly above the activities results screen. This allows for quick filtering of the results appearing in this tab. By default ALL activities are displayed, but options for viewing just Mailers, Notes, Reminders, or Open Reminders are available. Also, as you arrow through the various activities appearing in the Activities Tab, the remarks for each activity are displayed to the right of the windows just below Activity Details.

Attachment Tab

To enhance the amount and type of 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 referred to as *Attachments*.

To access an attachment at the other level, click the *Attachment Tab*.



Attachments are listed alphabetically by *Description*, and can be sorted from the drop-down menu by *Description, File Name, Directory Path, Computer Name, Original File Source, Compressed Size, File Date/Time, or Modified Date/Time.*

To add a new attachment click *Add*, and *Browse for Attachment* to identity the File Path of the file. The File Path includes the drive where the file is located, any directories or sub-directories, and the name of the file. Choose to compress the file by clicking in the Compression box. Enter a brief description of the attachment, if desired. When retrieving a profile and viewing Attachments, the attachments are listed alphabetically by *Description*.

Note: Although these file paths are created from one workstation, they are saved as part of your *ClientBase* database and so accessible from any *ClientBase* workstation.

To view a saved attachment, highlight the attachment, and click the *Open Attachment*, or double-click on attachment to open. *ClientBase* uses Windows associations to view the file type, load the appropriate software, and retrieve the specified file. Every file has an extension (e.g., .doc, .jpg, .bmp,.html, etc.) must be associated with a specific Windows software program such as MS Word, Paint Shop Pro, Internet Explorer, etc. to be viewed. Although this association is created automatically by Windows when various software programs are installed, if a workstation does not have a software program associated with the type of file an attachment is pointing to, then the file cannot be viewed from the attachment created in *ClientBase*.

Modifications to a file launched from *ClientBase* attachments can be saved automatically back into *ClientBase*. If an attachment is opened and then modified and saved, upon closing the attachment you land on the attachment settings window. Clicking *OK* from this area saves the newly modified file back to *ClientBase*. Click *Delete*, while the name is highlighted, to remove an attachment. *Save As Attachment* allows you to save a copy of the attachment into another file location.

Groups Tab

Profiles may be associated with a specific group which has been created by the agency. There is no limit to how many groups one profile may be associated with. Enter a group(s) to which this profile belongs by clicking the drop-down menu item after clicking *Add*. This group table is shared with *Trams Back Office*. Customize these items by going to **Global Defaults|General Setup|User Defined Fields|Groups: Other**, or by clicking the blue field label. To add a new group to the other's profile, click *Add*. To modify or enhance an group, click *Modify* while the group is highlighted. Click *Delete* while the group is highlighted to remove it.

Chapter 20: Understanding Your Database with Reports

This chapter addresses the use of ClientBase Reports. The key to quality reporting is having quality data in your system. The old adage "garbage in, garbage out" rings true. Many agencies miss out on marketing and reporting opportunities because they fail to recognize the importance of taking the time to capture important client data. Quality reporting, then, depends on the extent to which you capture data and the quality of the data captured.

Introduction

Computer systems can only report on the data entered into the system. We suggest entering every bit of information every time you receive new data, thus keeping your information as accurate and up-to-date as possible. Once data exists, you need a way to view the data in a meaningful way. The reports menu in *ClientBase* provides a tool to evaluate whether the collected data is meaningful in helping to achieve the following three major goals:

1) **Marketing** - By providing a bird's eye view of the agency's data, better understand the make-up of your customer database to more effectively plan marketing strategy and campaigns.

2) **Quality Control** - By analyzing the *ClientBase* data, easily detect the information that is being collected or that which is being missed, and whether the collected data is being correctly entered.

3) **Training and Incentives** - By reviewing the quantity and quality of information entered by agents, train agents to further enhance agency goals, and use the results of reports to measure agents' progress.

If you are using *Trams* products, such as *Trams Back Office* (TBO) or *ClientBase* by *Trams* (CBT), you know that in these programs, you first enter the Report's Menu or the Report's Manager to setup the selection criteria before running the desired report. In *ClientBase*, you have a choice of either running a Query containing the profiles, activities, or Res Cards you want included **before** selecting the desired report, or selecting the report you want to run first, and then choosing the profiles, activities, or Res Cards to include.

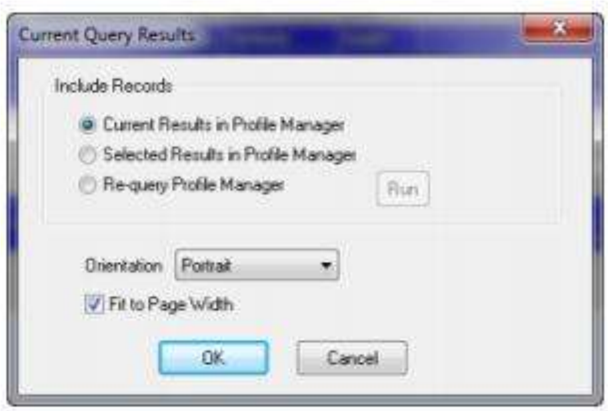
Using *ClientBase* Query Results to Run Reports

There are two ways of using the Query results to run reports in *ClientBase*.

Method One: After completing a Query using Level 1, 2 or 3 filters in the Profile, Activity or Res Card Managers, the Results Screen provides a count and list of Query results matching the filters. These are the Query results that will be included in your report. Review those results before entering the Reports Menu. Select specific entries from the Query for the report, by holding down the <Ctrl> key and, with your mouse, select consecutive or non-consecutive entries to narrow down results before clicking the Reports Menu. Only those selected entries are included in the reports. For additional selection choices, right mouse click in the results screen while holding down CTRL (if you have selected entries) to *Invert All, Select All, or Unselect All.*

Remember to save any Query together with desired output columns, as outlined in the "Using" chapters in this manual. This saves time and effort the next time you run a report.

Method Two: Before performing your Query, click **Reports** in the Main Menu, then select from the sub-menus for Profile, Activity or Res Card Reports. After choosing the desired report, a dialog box appears:



From here, include records from current results in the Profile, Activity or Res Card Manager, Selected Results in the Profile, Activity or Res Card Manager, or Re-Query the Profile, Activity or Res Manager. If you have not previously queried the records to include, you can do that now.

Profile reports only use results from the Profile Manager; Activity Reports only use results from the Activity Manager; and Res Card Reports only use results from the Res Card Manager.

Special Note: Any report run in *ClientBase* can be e-mailed as a .pdf (Adobe) file attachment by clicking the *E-mail* icon on the report toolbar, or saved on your computer in .pdf format by clicking on the disk icon.

Profile Reports

The type of information included in the Profile Reports varies, depending on what report category has been selected.

Note: In ClientBase v.3.08 or above, reports that use Traveler data have been changed to accommodate the traveler records.

- The Profile Detail report includes all Communication records (up to the maximum) in the Profile section, and all Cards in the Cards section.
- The Birthday Statistics report displays results based on the Traveler Birthdate field, but the Query Results total is still equal to the number of profiles in the query.
- The Completed Field Statistics report now includes Primary communication entries at both the Traveler and Profile level in the count of Completed.
- The Client Survey report includes both Profile and Traveler communication entries. Traveler Addresses are also included.
- Quick View now displays the Profile's Primary Phone and Email; if there is none at the Profile level, the Primary Traveler's Primary Phone/Email are displayed.
- The Client Survey now includes Traveler addresses in the Traveler section of the report.
- The Profile Lists Report displays the Traveler Address in the Traveler section.
- For profile reports that show primary communication entries, the profile's primary communication entry is used by default. If there is no Primary Communication at the Profile level, then the primary traveler's primary communication entry is used.

Current Query Results

The Current Query Results report provides a printed listing of the current Query results. This is a WYSIWYG (*What You See Is What You Get*) report. Columns included in this report are whatever columns are displayed with the current Query. To modify columns, click *Columns* directly above the results screen and select the columns to be displayed, and then run the report, or run this report by clicking the *Print* icon on the Toolbar.

Lists

Profile List Reports include the following options and display the Traveler Address in the Traveler section:

1 Line Summary - Includes a one-line summary of records in the Query and includes the fields, *Profile Type, Name, Address, Primary Phone and Primary Fax.*

2 Line Summary - Includes a 2-line summary of records in the Query - same columns as 1 Line Summary, but includes *Primary E-Mail, Interface ID,* and *Vendor ID.*

3 Line Summary - Includes a 3-line summary of records in the Query - same columns as 2 Line Summary, but includes checked marketing codes.

Detailed - One or more pages per profile - includes a detailed report of records in the Query and includes fields from the following *ClientBase* profile areas: *Address Information, Communication Information, Traveler Information, Profile PNR Information, Marketing Information, and Profile Remarks.* Be careful not to send too many detailed reports to a printer, as it may not have enough memory to handle printing. *[A window appears just before launching the report which includes a listing of the tabs of information you can include in the report. These settings will be remembered each time you run this report. Options include: General Information, Traveler Information, Profile PNR Entries, Marketing Information, Profile Remarks, All Communication records (up to the maximum), All Cards, Activities (last 3 for each type), Res Cards (last 3), Travel History (last 5), More Fields, and Groups (last 3)].*

Statistics

A Statistics format is included in *ClientBase* reports to provide a bird's eye view of the marketing and demographic data captured in the database, including summaries with totals and percentages. To run a *Statistics Report* in *ClientBase*, Query the desired records, and go to **Reports|Profile Reports|Statistics**.

Marketing Code Stats - For each Marketing Category Item, view *Profile Count, Profile Matches, and % (Profile Count/Profile Matches)*.

Referred by Stats - For each Referred By Item, view *Profile Count, Profile Matches, and % (Profile Count/Profile Matches)*.

Geographic Statistics - For each Zip Code, City and State, view *Profile Count, Profile Matches, and % (Profile Count/Profile Matches)*.

Birthday Statistics - For each Month/Date, view *Profile Count, Profile Matches, and % (Profile Count/Profile Matches)*. (Displays results based on the Traveler Birthday field, but the query results total is still equal to the number of profiles in the query.)

Special Date Statistics - For each Special Date Type, view *Profile Count, Profile Matches, and % (Profile Count/Profile Matches)*.

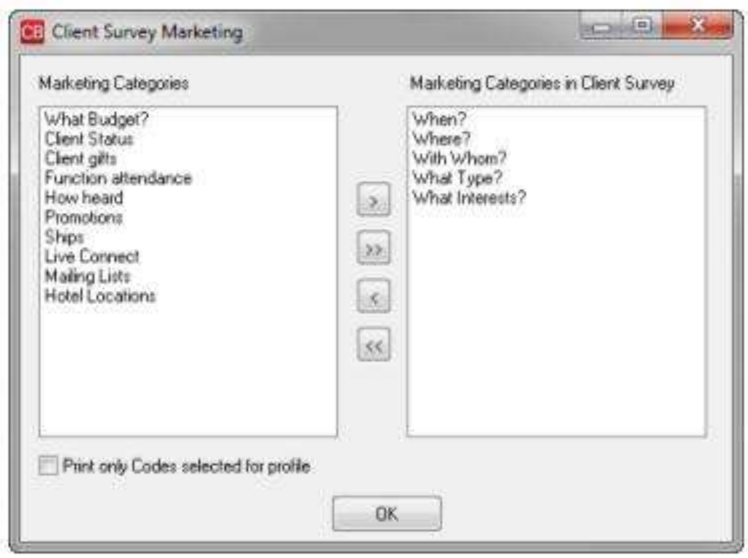
Completed Field Statistics - For primary fields captured with the General Information folder, view a *Profile Count, Matches and % (Profile Count/ProfileMatch)* for those fields. (Includes primary communications entries at both the Traveler and Profile level in the count of completed.)

User Stats - For each agent, view the *# of Profiles Created*, the *# of Profiles Modified*, and the *Total # of Updates.*

Client Survey

Rather than give a client a blank survey to complete, print or e-mail in Adobe pdf format a *Client Survey* right from *ClientBase*. Users may define what marketing tables and codes are included on the client survey printout. To set the client survey defaults, go to **Global Defaults|Client Survey Settings**. Highlight any of the marketing tables that you do not want included and click the left arrow to move them off the list of *Marketing Categories in Client Survey*. There is also an option of *Print only codes selected for profile*, which when selected, does not print all marketing codes available, but just the codes that have already been checked off. These Global Defaults can be overwritten each time a client survey is printed.

Client surveys can be e-mailed from inside the profile, by clicking the *E-mail* icon on the toolbar, and in the attachment tab, check the box *Client Survey.* This automatically includes the corresponding profile's Client Survey as a .pdf (Adobe) file attachment. Multiple surveys can be e-mailed from the results of a Query, as well. Client surveys can also be printed one at a time from within a client profile by clicking *Print* on the profile toolbar; or multiple surveys can be printed from the results of a Query, by going to **Reports|Profile|Client Survey**.



Travel History Report

These Travel History reports (in Summary or Detail) display past client purchases. For example, Query new clients for the past month and see what purchases were made, or Query for customers who like to Golf and see what vendors they booked and/or what destinations. The *Summary Format* provides a 1-line summary of the travel history total for each profile including the *Profile Name, Total Base, Total Tax, Total Fare* and *Total Commission* including a *Grand Total* at the bottom of the report. The *Detailed Format* gives a listing of each Invoice booking for each profile including the *Invoice Number, Invoice Date, Agent, Vendor, Itinerary, Total Fare* and *Commission*.

Activity Reports

The type of information included in the Activity Reports varies, depending on the Report Category.

Current Query Results

The Current Query Results report provides a printed listing of current Query results. This is a WYSIWYG (*What You See Is What You Get*) report. Columns included in this report are whatever columns are displayed in the results screen. To modify columns, click *Columns* to select the columns to be displayed on the report. You can also run this report by clicking the *Print* icon on the Toolbar.

Lists

Summary - Includes a one-line summary of *Type, Profile, Agent, Date, Time, Subject, Completion Date, Private, Priority and Remarks Field*.

Detailed - Provides a detailed report of all fields in the activity including *Type, Profile, Date, Time, Completion Date, Agent, Priority, Private, Subject, Alarm Date, and the Remarks fields.*

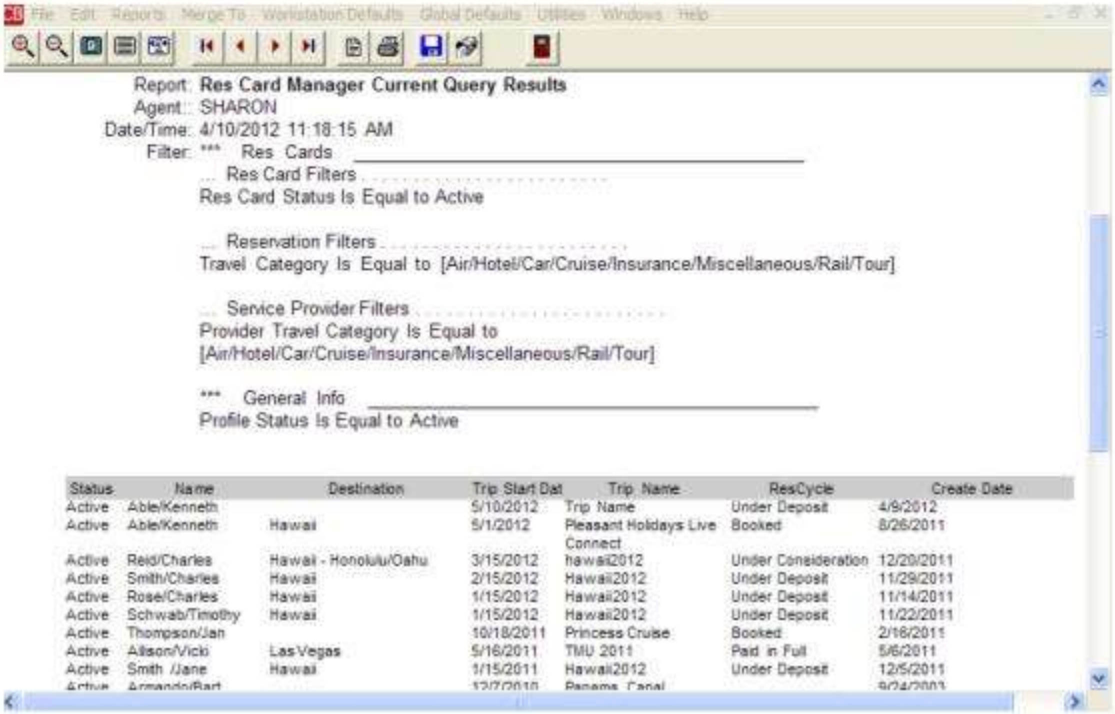
Statistics - User Stats

For each user, view selected activity statistics sorted by either Activity Type of Subject including *Query Results, Matches, and % (Query Results/Matches)*. The average number of days in these reports is the duration divided by the number of records.

Res Card Reports

The type of information included in the Res Card Reports varies, depending on the Report Category.

Current Query Results



The Current Query Results report provides you with a printed listing of your current Query results. This is a WYSIWYG (*What You See Is What You Get*) report. Columns included in this report are whatever columns are displayed in the results screen. To modify columns, click *Columns* directly above the results screen and select the columns to be displayed, and then run the report. You can also run this report by clicking the *Print* icon on the toolbar.

Final Payment Report

The Final Payment Report organizes reservation data by the month and year the final payment is due, and includes the following columns: *Date, Client Name, Vendor Name, Reservation Total, Invoiced Total, Agent, Uninvoiced Total, Trip Name and Travel Category* with grand totals per Client Name. This report is very useful when projecting what vendor payments are due and when. To run this report make sure the *Final Payment Due* field in a **Res Card|Reservation|Final Payment** tab is entered.

Reservation Cycle Report

The Reservation Cycle Report is sorted by Reservation Cycle *(Lead, Booked, Under Deposit, Paid in Full, and Returned From Trip)* and is then sorted by each agent to include Res Card details. Under each *Reservation Cycle,* these columns are included: *Agent, Create Date, Region, Trip Name, Client Name, Reservation Total, Invoiced Total, and Uninvoiced Total* with grand totals for each Res Cycle*.* This report gives a bird's eye view of the various bookings agents are working on, and the sales cycle for each.

Service Provider Activity

The Service Provider Activity Report is sorted by each service provider and then by Agent and provides the following columns of information: *Service Provider, Agent, Create Date, Region, Travel Category, Start Date, End Date, Total Fare, Base, Tax, Commission* and with grand totals for each service provider. By default the dollar amounts coming from the first service provider allocated pricing area. If you would like a break-down of all service providers in the reservation, you must manually enter details into the allocated pricing area for each service provider.

Vendor Booking Report

The Vendor Booking Report can be sorted by Agent, Create Date, Region and Start Date and provides the following columns of information: *Vendor, Agent, Create Date, Region, Travel Category, Start Date, End Date, Total Fare, Base, Tax, Commission* and *# of Pax,* with grand totals for each vendor. Unlike the *Trams Back Office* vendor activity reports, *ClientBase* gives your agency the ability to run "Activity" reports based on criteria other than invoice issue date. Analyze sales figures based on booking date or other Res Card criteria. If the *Include Itemization Details* setting is checked, upon running these reports, rather than just printing each reservation total, base, tax and commission, the system prints the itemization details if they have been captured for that reservation.

Agent Booking Report

The Agent Booking Report lists and sub-totals reservations that meet search criteria by agent. The report can be sorted by Agent, Create Date, Region and Start Date and provides the following columns of information: *Vendor, Agent, Create Date, Region, Travel Category, Start Date, End Date, Total Fare, Base, Tax, Commission* and # or Pax, with grand totals for each agent.

Unlike the *Trams Back Office* agent activity reports, *ClientBase* provides the ability to run "Activity" reports based on criteria other than invoice issue date. Analyze sales figures based on booking date or other Res Card criteria. If the *Include Itemization Details* setting is checked, upon running these reports, rather than just printing each reservation total, base, tax and commission, the system prints the itemization details if they have been captured for that reservation.

Client Booking Report

The Client Booking Report lists and sub-totals reservations that meet client search criteria. The report can be sorted by *Agent, Create Date, Region* and *Start Date* and provides the following columns of information: *Vendor, Agent, Create Date, Region, Travel Category, Start Date, End Date, Total Fare, Base, Tax, Commission* and # of Pax, with *Grand Totals* for each agent.

Unlike the *Trams Back office* client activity reports, *ClientBase* provides the ability to run "Activity" reports based on criteria other than invoice issue date. Analyze sales figures based on booking date or other Res Card criteria. If the *Include Itemization Details* setting is checked, upon running these reports, rather than just printing each reservation total, base, tax and commission, the system prints the itemization details if they have been captured for that reservation.

Close Ratio Report

The Close Ratio Report analyzes the Res Cards within the current Res Card Manager Query results and provides statistics on your close ratio, which is the % of total Res Cards that include a confirmed or invoiced reservation. The report can be sorted by Agent or by Marketing Source, and the basis for considering a Res Card "closed" can be set to either having a "confirmed reservation" or an "invoiced reservation". The following information is then printed on this report: *Agent Name or Marketing Source (based on report setting), Total Number of Res Cards, Total Number of Res Cards either with Invoices or with confirmed Reservations (based on report sorting), Total Number of Res Cards without Invoices or confirmed Reservations, Close Ratio Percentage, Average # of Days to Close, Average Trip Total, and Average Trip Commission.*

If agents are trained to create a Res Card when a trip inquiry is first received, whether anything is booked at that time or not, then this report provides valuable sales analysis to help you track, train, and motivate your agents to close more of the inquiries that come into your agency.

The setting *Include only Users that have Stats* is checked by default and will include only users that have something other than 0 within the Profiles Created and Profiles Modified counts. If you would like to include a complete listing including Users that have no stats then remove the check within this setting.

Statistics - Agent Stats

The Agent Stats Statistics Report is sorted by agent and then by reservation cycle *(Lead, Booked, Under Deposit, Paid in Full, and Returned From Trip)* and includes the following columns: *Agent, Reservations Cycle, Query Results, Matches, % (Query Results/Matches)* and *Average # of Days.*

Inventory Reports

To run an inventory report first use the Level 1 or Level 2 Query filters within the Inventory Manager to display a listing of the inventory records to report on. After displaying desired results, go to **Reports|Inventory Reports** and select from the following:

Current Query Results

Travel C	Start Date	Vendor	Bloc	Sol	Avail	ServiceProvider	End Date	Description	Inventory ID
Cruise	10/10/2011	Carnival Cruise Line	10	3	7	CarnivalVictory	10/18/2011	Southern Caribbean	CARSC0090111
Cruise	10/10/2011	Carnival Cruise Line	15	3	12	CarnivalVictory	10/18/2011	Southern Caribbean	CARSC0090111
Cruise	10/16/2011	Princess Cruise Lines	5	4	1	CoralPrincess	10/23/2011	Panama Canal	JONES
Cruise	10/16/2011	Princess Cruise Lines	10	2	8	CoralPrincess	10/23/2011	Panama Canal	JONES
Cruise	10/16/2011	Princess Cruise	5	3	2	CoralPrincess	10/23/2011	Panama Canal	JONES

The Current Query Results report provides a printed listing of current Query results. This is a WYSIWYG (*What You See Is What You Get*) report. Columns and sorting included in this report are whatever columns and sorting are displayed in the results screen. To modify and sort columns, click *Columns* before running the report. You can also run this report by clicking the *Print* icon on the Toolbar.

Client Lists

1, 2, 3 Line Summary: This report provides a summary of each Inventory record within the current Inventory Manager Query Result screen, along with a summary of the clients that have purchased (or are linked) to that inventory. For example, if you have 20 cabins blocked and 3 are sold, this report lists the client details for those 3 sold reservations.

Res Card List

This report provides a summary of each inventory record within the current inventory manager Query result screen, along with a summary of the Res Cards that are linked to that inventory. For example, if you have 20 cabins blocked and 3 are sold, this report lists the Res Card details for those 3 sold reservations.

Traveler List

This report provides a summary of each inventory record within the current inventory manager Query result screen, along with a summary of the travelers that are linked to that inventory. For example, if you have 20 cabins blocked and 3 are sold, this report lists the traveler totals and details for those 3 sold reservations.

Note: When running any report in *ClientBase* you have the option to include all *Current Results* or just *Selected Results*. If you would like to report on just one result or multiple results from within a given Query, first identify the records to include from your inventory manager Query results screen. To select just one Inventory record to report on, simply click the record to highlight it, then go to **Reports|Inventory Reports** and select the desired report and check *Selected Results*. To select more than one record on which to report (but not all records), use the CTRL key and click each inventory record to include. Then go to **Reports|Inventory Reports** and select the report and check *Selected Results*.

ClientBase Agency Operations Reports

Below are some report samples you may be interested in running for your agency.

Daily Agency Reports

REVIEW PROFILE QUANTITY (PROFILE REPORTS)

- Level 2 Query Profile Modified Date: From =-1,0,0 To =-1,0,0

- Go to **Reports|Statistics|User Stats**

REVIEW PROFILE QUALITY (PROFILE REPORTS)

- Level 2 Query Profile Modified Date: From =-1,0,0 To =-1,0,0
- Go to **Reports|Profile Reports|Statistics|Completed Field Statistics** (if you have not setup Required Fields profile fields, this is a way to see if these fields are being completed by each agent)
- Go to **Reports|Profile Reports|List|Detailed or 3 Line summary**. Check that each profile has marketing data, review the profiles for missing data.
- Click Columns, add Create by Agent and/or Primary Agent plus any specific fields you are interested in viewing.
- Go to **Reports|Profile Reports|Current Query Results** to print out a “What you see is what you get report.”

PAST DUE REMINDERS (ACTIVITY REPORTS)

- Level 1 Query Open Reminders Date: From = (Leave Blank) To =-1,0,0 and Agent Field blank.
- Go to **Reports|Statistics|User Stats** and sort by Type
- Click Columns, and add Create by Agent plus any specific fields you are interested in viewing (Activity Remarks)
- Go to **Reports|Activity Reports|Current Query Results** or **Reports|Activity Reports|List|Detail**

NEW TRIP INQUIRIES (ACTIVITY)

- Level 2 Activity Query, Check Reminders, Create Date: From =-1,0,0
- To =-1,0,0, with Subject New Trip Inquiry Follow-up
- Go to **Reports|Activity Reports|List in Summary or Detail**, or **Reports|Activity Reports|Statistics|User Stats**

NEW TRIP INQUIRIES (RES CARD REPORTS)

- Level 2 Query Res Cards with Sales Cycle Under Consideration
- From =-1,0,0 To =-1,0,0
- Go to **Reports|Res Card Reports|Res Cycle Report** sorted by Agent
- Level 2 Query Res Cards, Active Status From=-1,0,0 TO=-1,0,0
- Go to **Reports|Res Card Reports|Statistics** and sort by Reservation Cycle.

Weekly

WELCOME NEW CUSTOMERS (PROFILE REPORTS)

- Level 2 Query Profile Create Date: From =Mon To =0,0,0
- Go to **Reports|Profile Reports|Client Survey.** Print to include with *Welcome to the Agency* letter

PUBLISH WEEKLY STATISTICS (PROFILE REPORTS)

- Level 2 Query Profile Modified Date: From =Mon To =0,0,0
- Go to **Reports|Profile Reports|Statistics|User Stats**

REVIEW COMPLETED REMINDERS (ACTIVITY REPORTS)

- Level 2 Query Reminders Completed From =Mon To =0,0,0
- Go to **Reports|Activity Reports|Statistics|User Stats** sort by Subject
- View results of completed reminders by going to **Reports|Activity Reports|Lists|Detail**

REVIEW ACTIVITIES CREATED (ACTIVITY REPORTS)

- Level 1 Query All Notes, Mailers, Reminders, From =Mon To =0,0,0 and Login Name blank
- Go to **Reports|Activity Reports|Statistics|User Stats** sorted by Type or Subject

WELCOME HOME CUSTOMERS (ACTIVITY REPORT)

- Level 2 Activity Query Open Reminders From =Mon To =0,0,0 with Subject *Welcome Home*
- Go to **Reports|Activity Reports|Statistics|User Stats** to check if agents are creating reminders

REVIEW BOOKINGS NOT PAID YET (RES CARD REPORTS)

- Level 2 Res Card, Deposit Due From =Mon To =0,0,0 and Invoiced = No
- Go to **Reports|Res Card Reports|Current Query Results**
- Go to **Reports|Res Card Reports|Vendor Booking Report** to review vendors booked to see if any non-preferred vendors have been booked.

Monthly Routine

NEW CUSTOMER ANALYSIS (PROFILE REPORTS/RES CARD REPORTS)

- Where did they come from? (Level 2 Query Create Date From=1,-1,0 To=31,-1,0
- Go to **Reports|Profile Reports|Statistics|Referred by Stats**

- Did they book anything? (Level 2 Res Card Query Create Date From=1,-1,0 To =31,-1,0
- Go to **Reports|Res Card Reports|Reservation Cycle**

- Did we get Surveys? Was data updated? (Level 2 Query Profile Create Date From=1,-1,0 To =31,-1,0 and and Survey Received customized More Field or Marketing Code
- Go to **Reports|Profile Reports|List|3 Line Summary**

CURRENT CUSTOMER ANALYSIS (PROFILE REPORTS)

- Where are the niches? Query All Leisure Clients and go to **Reports|Profile Reports|Statistics|Marketing Code Stats**

- What are upcoming birthdays? Level 2 Query in Family Member|Employee tab, and put in present Month in FROM/TO dates. Make sure columns selected are Passenger Last Name and First Name. Go to **Reports|Profile Reports|Lists or Reports|Profile Reports|Current Query Results**

- Special Dates - query All Clients and go to **Reports|Profile Reports|Statistics|Special Date Stats**

- Check out enhanced Birthday and Special Reports on our website at **www.trams.com, Products|TRAMS Crystal Reports.**

MARKETING ACTIVITY ANALYSIS (ACTIVITY REPORTS)

- Query All Marketing Activities for month and go to **Reports|Activity Reports|Activity Stats** sorted all ways

- Query all Mailers for month with response date to see how successful were mailings for the month
- Go to **Reports|Activity Reports|Lists|Summary**

RES CARD ANALYSIS (RES CARD REPORTS)

- Query all Res Cards for month and go to **Reports|Res Card Reports|Reservation Card Cycle** (What cycle are they in and are there any cancellations?)
- Go to **Reports|Res Card Reports Final Payment Report**
- Go to **Reports|Res Card Reports Vendor/Service Provider** (What vendors or service providers are they booking? What are destination/vendor trends?)

- Query *Source of Booking* using the Mailer name, and go to **Reports|Res Card Reports|Client Booking Reports*.***

Inventory Manager Reports

We cannot assign a time frame to run the Inventory Reports since this depends on when you need to review blocked space.

QUERY FOR UTILIZATION DATE AND CHECK STATUS OF GROUP SPACE

- Go to **Reports|Inventory Reports|Res Card List** to view *Reservation Cycle*
- Go to **Reports|Inventory Reports|Current Query List** to review usage status. Can also print to distribute to staff.

QUERY FOR SPECIFIC INVENTORY SPACE

- Go to **Reports|Inventory Reports|3 Line Summary-**verify agency has client details such as address, phone, etc.
- Go to **Reports|Inventory Reports|Res Card List for details of client bookings**

TRAMS CRYSTAL REPORT PASSENGER MANIFEST

- Query passengers by Group Name
- Go to **www.trams.com|Products|TRAMS Crystal Reports to print out Passenger Manifest.** Check cabin assignments, travelers, and passenger details

Trams Crystal Reports

Trams Crystal Reports is an add-on to *ClientBase* and/or *Trams Back Office* that offers you the ability to run pre-designed Crystal Reports in addition to those offered within the *Trams Back Office* and *ClientBase* products. TCR10 is the most recent version of *Trams* Crystal Reports that is integrated with *Trams Back Office* and *ClientBase*. When TCR10 is installed, you will be able to launch *Trams* Crystal Reports from your desktop or in *Trams Back Office*, using the TCR Viewer under Reports. For more information on *Trams* Crystal Reports and the *ClientBase* reports that are available go to **www.sabretravelnetwork.com/*trams***.

Chapter 21: Tools for Maintaining a Healthy Database

A healthy database is one of your agency's biggest assets. It is the foundation for building your business. For a database to carry the weight of a growing business, the integrity of the data must be maintained. This chapter outlines guidelines for maintaining a healthy database.

Introduction

Saving data files at the end of each day's work is absolutely vital! If you do not, you run the risk of losing data - one of your agency's most precious assets. Even though PC hardware has become more reliable, and *ClientBase* makes every effort to protect the integrity of the system against mechanical failures and user errors, no system is 100% failure-proof.

Back Up the Trams Database

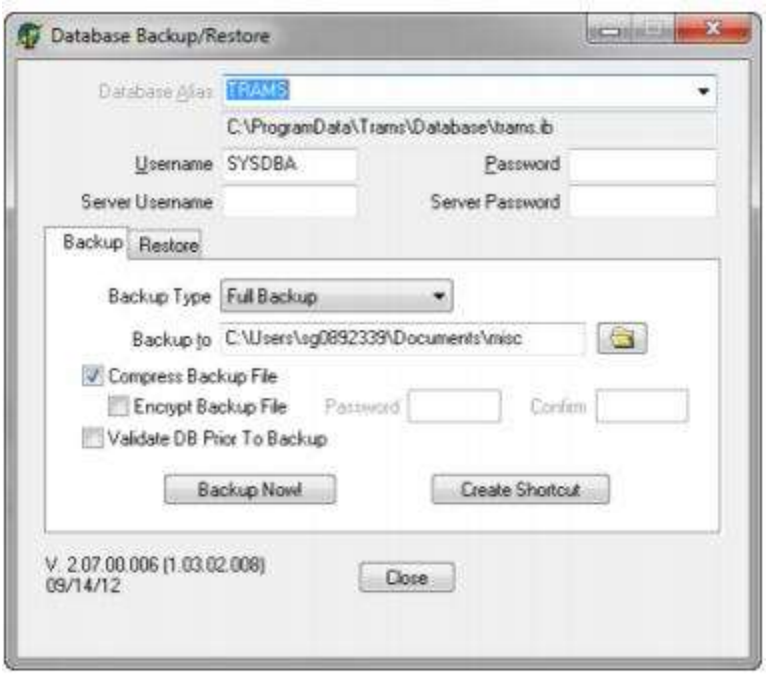
Why Perform a Backup?

***Because some day the computer housing the Trams database* WILL *crash. Backup is the ONLY insurance*!**

Preparing for Backup Tips

Use the *Trams* Backup Utility. Use the *Trams* Backup Utility (Ibbackup.exe) to create a Trams.gbk.zip file. This file would be used to restore the database should the need arise. Backing up just the database file (.IB) would not provide the ability to restore a database, as it is not a restorable file. Restoring a.gbk.zip backup file also re-indexes the database files.

Backup must be done regularly. Backup every day, prior to adding more data to the system,. Formatting two sets of backup media (Flash drive, i.e.), and labeling them "A" and "B" is recommended. Rotate the media, using one, then the other. Suggestion to take an extra backup once a week and take it off-site. To start the backup utility, go to **Start|Programs|Trams|*Database Backup Restore***.



Database Alias: *Database Alias* from the drop-down. This is the database which will be backed up.

Database Path: By default below the *Database Alias* is the path where the data currently resides that was setup in the Alias Utility.

Username: By default the SYSDBA is the *Username.*

Password: Enter the password for the SYSDBA.

Server Username and Server Password: Are used when backing up an EUA enabled database. For EUA databases, there's a server-wide SYSDBA user and a database SYSDBA user that are different. Both need to be specified. For non-EUA databases, just the traditional username/password needs to be specified.

Backup Type: Select *Full Backup, Full Dump,* or *Incremental Dump* (See below section below, *Interbase XE Additional Backup Options*.)

Backup To: Enter or search for the drive, medium, or directory to which to backup.

Compress Backup File: Place a checkmark in the *Compress Backup File* box to compress the backup file.

Encrypt Backup File/Password/Confirm: An option to encrypt and password protect the backup file. If a password is specified during the backup and the backup is being compressed, the resulting zip file will be encrypted using AES 256 encryption.

Note: When restoring a compressed backup that is password-protected, if the user specifies an invalid password, then the restore will fail. ***If the encryption password is lost, there is currently no method for recovering the password and the encrypted backup cannot be restored.***

Validate DB prior To Backup: The validate option works with both backup and restore steps. Validating on restore is a bit slower, but it ensures that the database is valid. Validating on the backup is much slower than a normal backup and the validation does not fix issues. A database that is restored and fails validation will have the db fail flag set. Users cannot log in until the restore is complete, regardless of whether validation is done.

Create a Shortcut: Once the backup utility is set up for the first time, clicking the button creates a shortcut on the desktop that can be used every time backup is performed. All of the settings/options will be retained.

Interbase XE Additional Backup Options

Interbase XE adds some additional backup options for enabling very fast backups/restores. Interbase now has an option for what is called an *Online Dump*. An online dump is an exact copy of the database that can be created while the database is in use. The resulting dump file is a complete copy of database at the point in time when the online dump is started, but is in read-only mode.

The initial creation of the dump file can take a few minutes. Once created, incremental dumps can be performed which only update those parts of the original database that have been modified and are typically very fast.

OPTIONS FOR CREATING A BACKUP VIA ONLINE DUMP

Dump Copy: Similar to a full backup, creates a new Dump file, compresses it, then stores the file in the target location. The resulting file will be larger than a normal full backup, but should get created faster.

Dump Full: Creates a new Dump file on the server, overwriting any existing dump file with the same name. The target directory must be located on the server or be on a shared folder that the server can access.

Dump Incremental: Updates an existing Dump file on the server with any changes since the last update.

Dump Full or Dump Incremental. If the file doesn't already exist, then this works like a Dump Full and a new Dump file is created. Dump Full/Incremental creates a file with the same name as the database but ending in .DMP instead of .IB.

We have not automated the process of restoring a dump file, however for a manual restore:

Copy the .DMP file to the directory where the database is normally located and rename to .IB. Connect to the database via IB Console and change the Read Only property under Options on the General tab of Database Properties from TRUE to FALSE.

CONSIDERATIONS

- The Dump file is an exact copy of the database, except in read-only mode. Any corruption present in the original database will carry over to the Dump copy. It is still recommended to create periodic full backups using the original method.
- The Dump file should be restored to the same version of Interbase where it was created. Moving to a newer version of Interbase should be ok, but moving to an older version won't work.

- The Dump file is typically maintained on the same server as the database. Recommendation is that the Dump file be stored on a separate volume on the server so that a disk failure won't affect both the database and the dump file. It's possible to store the dump file on a separate server, but it requires additional configuration.
- The Online Dump process can run while users are in the system and while a Full Backup is being run.

Example backup schedule for typical large agency:

Every 2 hours during business hours: Incremental Dump

Daily after hours: Full Backup to external media.

Weekly after hours: New Full Dump.

The Backup Utility contains additional options that pertain to an XE database version

New Server username and Server password fields have been added and are used when backing up an EUA enabled database. For EUA databases, there's a server-wide SYSDBA user and a database SYSDBA user that are different. Both need to be specified. For non-EUA databases, just the traditional username/password needs to be specified.

The Backup Type drop-down field contains the following options:

- Full Backup
- Full Dump
- Incremental Dump

Disaster Recovery

Interbase XE and higher adds some additional backup options for enabling very fast backups/restores.

Interbase now has an option for what is called an *Online Dump*. An Online Dump is an exact copy of the database that can be created while the database is in use. The resulting dump file is a complete copy of database at the point in time when the online dump is started, but is in read-only mode.

The initial creation of the dump file can take a few minutes. Once created, we can perform incremental dumps which only update those parts of the original database that have been modified and are typically very fast.

OPTIONS FOR CREATING A BACKUP VIA ONLINE DUMP

- Dump Full: Creates a new Dump file on the server, overwriting any existing dump file with the same name. The target directory must be located on the server or be on a shared folder that the server can access.
- Dump Incremental: Updates an existing Dump file on the server with any changes since the last Dump Full or Dump Incremental. If the file doesn't already exist, then this works like a Dump Full and a new Dump file is created.
- Dump Full/Incremental creates a file with the same name as the database but ending in .DMP instead of .IB.

We have not automated the process of restoring a dump file, but it's pretty simple:

- Copy the .DMP file to the directory where the database is normally located and rename to .IB.
- Connect to the database via IB Console and change the Read Only property under Options on the General tab of Database Properties from TRUE to FALSE.

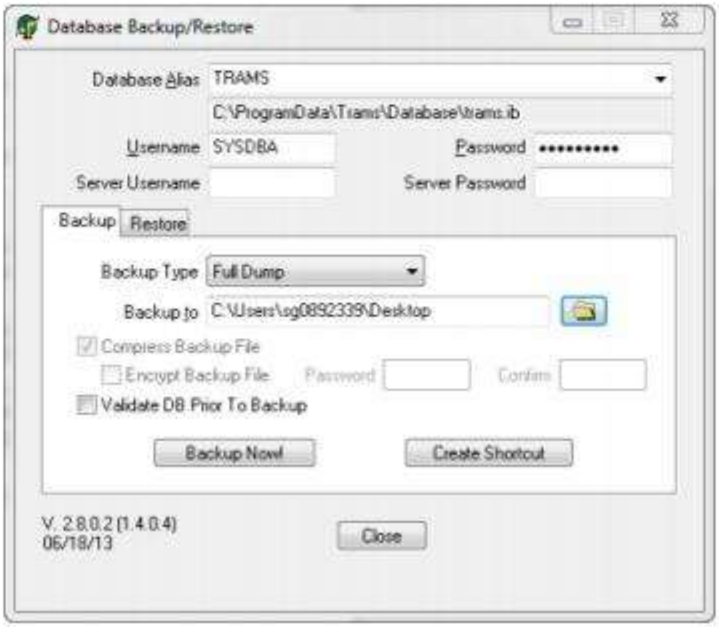
CONSIDERATIONS

- The Dump file is an exact copy of the database, except in read-only mode. Any corruption present in the original database, will carry over to the Dump copy. We still recommend creating periodic full backups using the original method.
- The Dump file should be restored within the same version of Interbase that created it. Moving to a newer version of Interbase should be ok, but moving to an older version won't work.
- The Dump file is typically maintained on the same server as the database. We recommend that the Dump file be stored on a separate volume on the server so that a disk failure won't affect both the database and the dump file. It's possible to store the dump file on a separate server, but it requires additional configuration.
- The Online Dump process can run while users are in the system and while a Full Backup is being run.

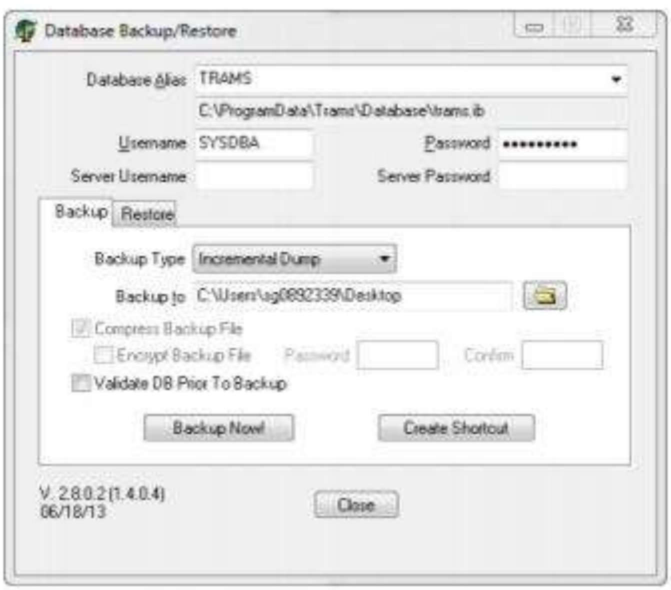
EXAMPLE BACKUP SCHEDULE FOR TYPICAL LARGE AGENCY

- Every 2 hours during business hours: Incremental Dump
- Daily after hours: Full Backup to external media.
- Weekly after hours: New Full Dump.

The full dump only needs to be done one time. Specify the backup type as Full Dump. Identify where to store the DUMP file. Enter the path in the Backup To field.



The incremental backup would look almost the same except the Backup Type is set to Incremental:



CREATE A SCHEDULED TASK FOR THE INCREMENTAL DUMP

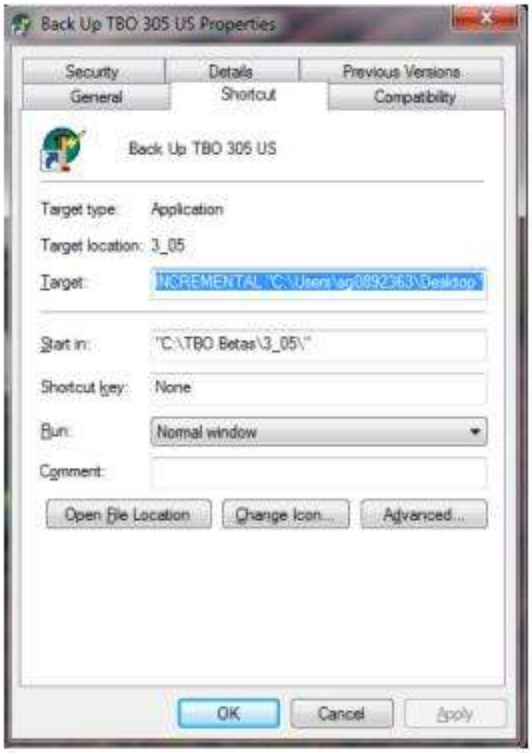
To create the command line to use in the scheduled task:

1. Click <Create Shortcut>

2. Go to the newly created shortcut, right click on the shortcut icon and select properties

3. Copy the information in the target field

4. Paste the command line in the scheduled task.



IN THE EVENT OF A DISASTER

1. If there are connections to the affected database, disconnect all connections by shutting down the IBServer service.

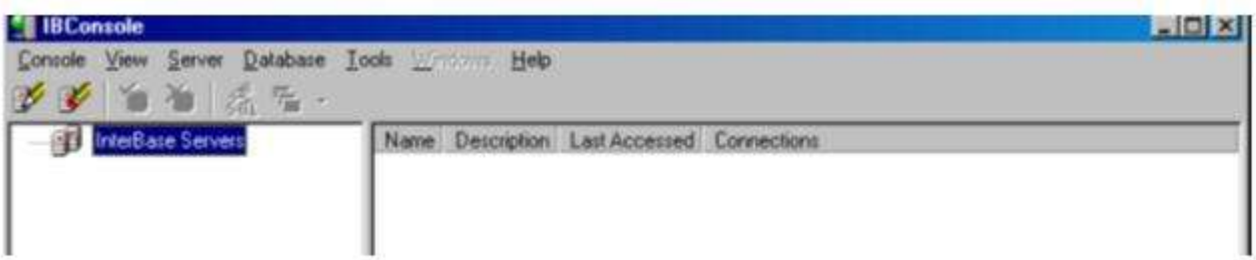
2. Copy the .DMP file to the directory where the database is normally located and rename to .IB.

3. Connect to the database via IB Console (see detailed instructions below)

4. Change the Read Only property under Options on the General tab of Database Properties from TRUE to FALSE. (see screen snap in detailed instructions below)

USING IBCONSOLE

IBConsole is a database management tool included with the Interbase Server installation. The IBConsole.exe shortcut will normally be found in the Interbase XE group in your Programs menu. Double-click to launch IBConsole.



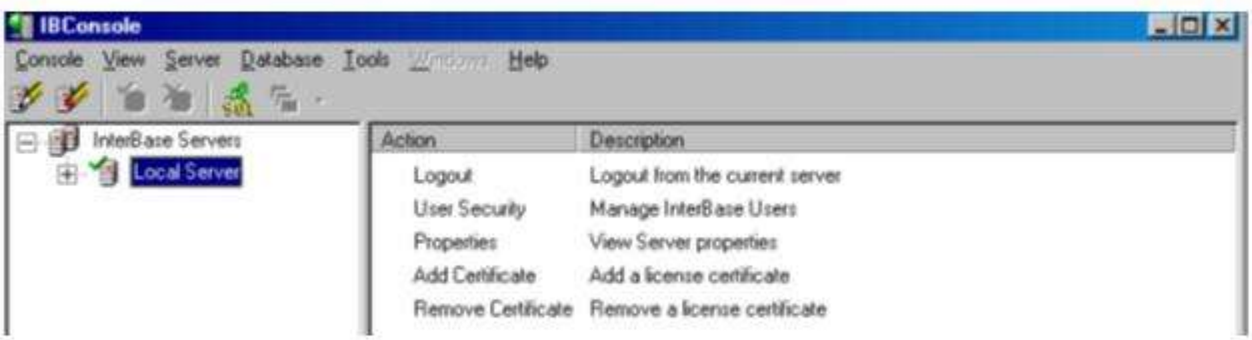
Double-click on the Interbase Servers item in the tree shown on the left side of the form. This will display the Register Server and Connect form.

Usually **IBConsole** is operated on the machine hosting the Interbase database so the default selection of **Local Server** is typically used. If the database is hosted on a remote machine then select **Remote Server**, enter the **Server Name** in DNS or IP format and select the **Network Protocol** (usually TCP/IP).

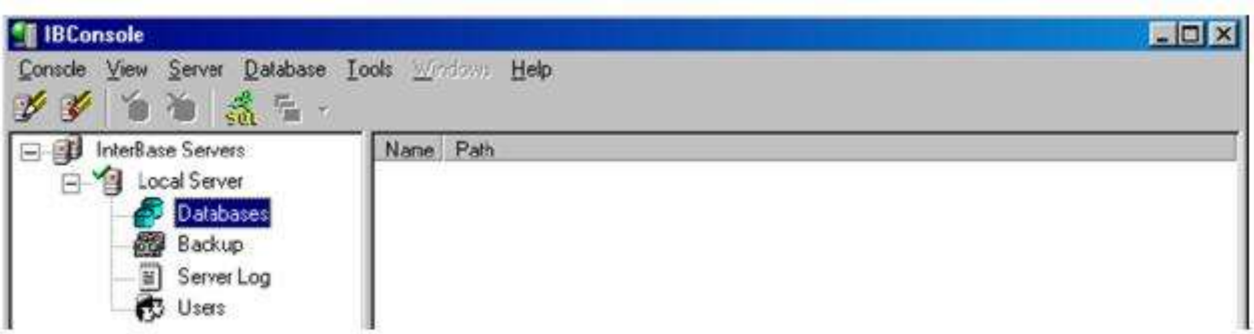
In this case it is preferable to use **Remote Server**, a **Server Name** of localhost, an appropriate **Network Protocol** (usually TCP/IP) and an **Alias Name** to identify the server in the configuration.

Enter the User Name (default administrator User Name is shown, SYSDBA) and password. Press OK to connect to the server using the configuration options shown.

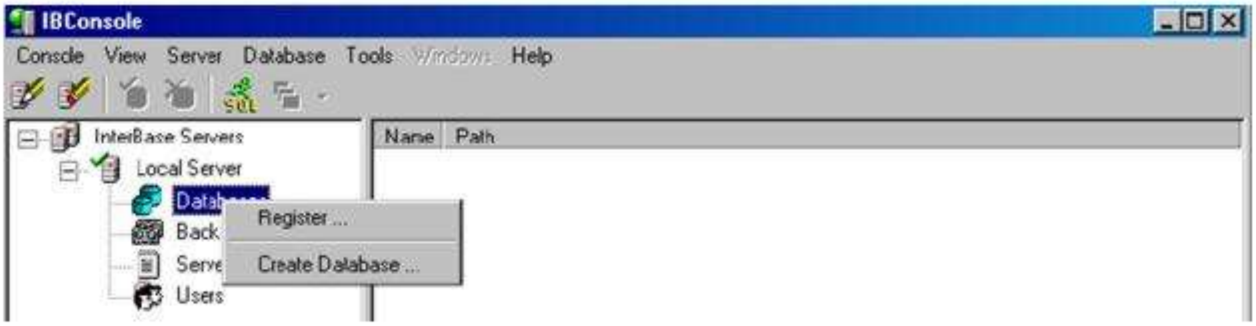
If the connection was successful the configuration in IBConsole will update.



Double-click on Local Server to expand the connection options, shown below.



Right-click on Databases to display the database registration menu.



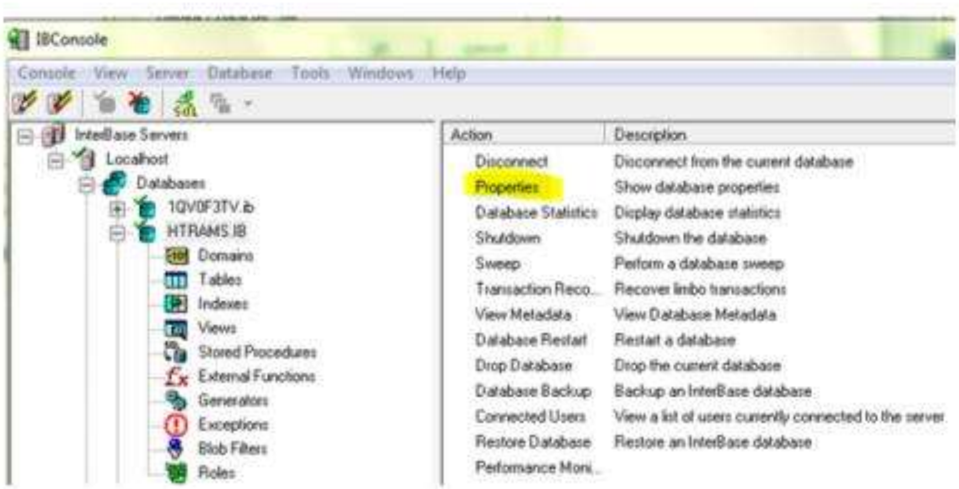
Select Register to display the Register Database and Connect form.

The actual database file must be specified using this form. Press the file open button to the right of the Database File edit to browse and select the IB file.

Note: When using Remote server connections the file browse button will be disabled, you must manually type in the path and name of the Trams.ib file. Make sure Save Alias Information is checked. Enter the User Name for the database server and the Password in the fields on the form.

Other options can be left at their defaults.

Click *OK* to connect to the specified database.



Double-click Properties to display the database properties which are seen below.

E-mail Notification on ibbackup

There is a backup e-mail notification feature that will send an e-mail to the specified user if a backup fails with an option to send e-mails for completed backups as well.

SETUP PROCESS

1. Go to the Trams program group under **Start/All Programs/Trams/Database Backup** and open the backup utility.

2. Ensure the user name and password are filled in

3. Click the Create Shortcut button. The places a backup shortcut on the desktop.

4. Right-click on the backup shortcut on the desktop and select properties.

5. In the Target field right-arrow to the end of the existing information in the field.

6. Add the information in the example below replacing the generic -EMAILSERVER information with the proper e-mail server address and also replace the -EMAILTOADDR information with the proper e-mail address for the recipient.

7. Click *OK* to save the changes.

Note: If you currently have scheduled backup information in the backup shortcut, append this additional information to the end of that command line.

NEW IBBACKUP COMMAND-LINE OPTIONS

EMAILSERVER <servername>

EMAILTOADDR <to-address>

EMAILNOTIFYALL

Example: "C:\Program Files\Trams\Common Files\ibbackup.exe" -EMAILSERVER mail.sabre.com -EMAILTOADDR youre-mailaddress@hotmail.com -EMAILNOTIFYALL

The EMAILNOTIFYALL option sends an e-mail for completed backups. If only failed backup notifications are required, eliminate this option.

This feature is only designed for simple SMTP.

- no authentication

- default port: 25

- no TLS/SSL

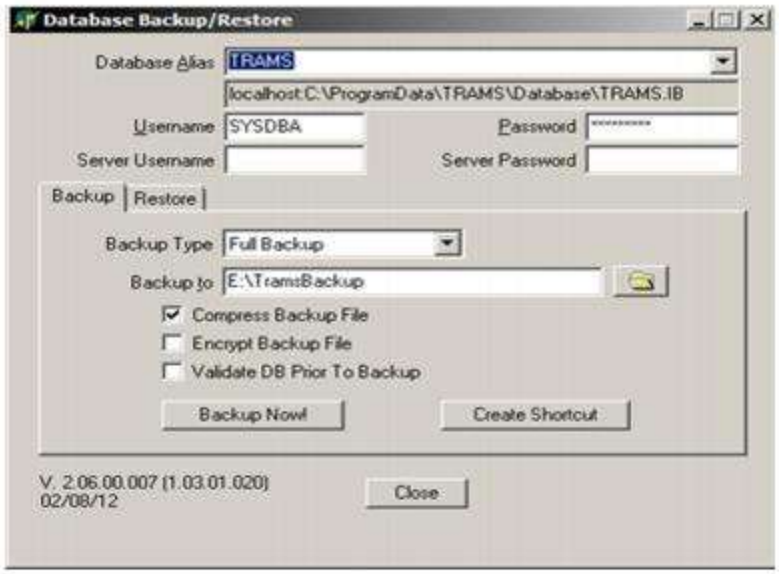
- no MAPI SUPPORT

Scheduled Backup on Vista/Windows 7/Server 2008/Server 2012

GETTING THE PARAMETERS FOR THE AUTOMATIC BACKUP

Create a shortcut for the backup process on the desktop.

1. Start the Trams Backup Utility. You can click on Start, (All) Programs, TRAMS, and Trams Backup Restore or Start, (All) Programs, Trams Back Office, then Database Backup.



2. Make sure the Username is SYSDBA. Enter the appropriate password.

3. Currently, nothing should be entered in Server Username or Server Password.

4. If the desired backup location is not already displayed next to "Backup to," click on the Folder icon to browse to and select the path you wish to back up to.

5. Compress Backup File should normally be checked if you want the backup to be compressed to zip format.

6. Click "Create Shortcut"

At this point, you will have an icon on the desktop named "Backup," plus your alias name. Usually it will be named "Backup TRAMS." When double clicked, it will bring up the same parameters as entered when Create Shortcut was clicked. For the purposes of creating the automatic backup, what we need are these parameters.

7. Right click on this Backup TRAMS shortcut icon on the Desktop and select "Properties".

8. If the text in the Target box is already highlighted right click on the highlighted text and select "Copy."

9. If not, right click inside the Target box, choose "Select All" then follow step 2 to copy the text.

10. Close the Shortcut's properties.

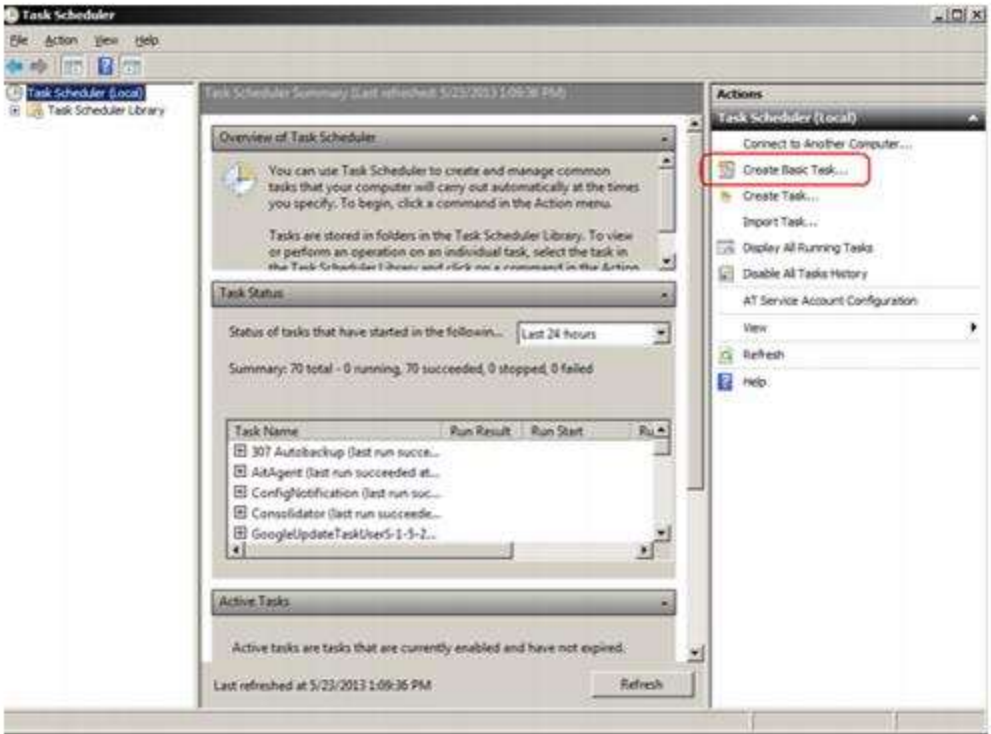
The full copied text will look something like this: "C:\Program Files (x86)\Trams\Common Files\ibbackup.exe" -UserName SYSDBA -EncPwd1 "696D28D2F51DB07CEF" -Alias "TRAMS" "E:\TRAMSBCKUP"

CREATING THE SCHEDULED TASK IN WINDOWS VISTA/WINDOWS 7/SERVER 2008/SERVER 2012

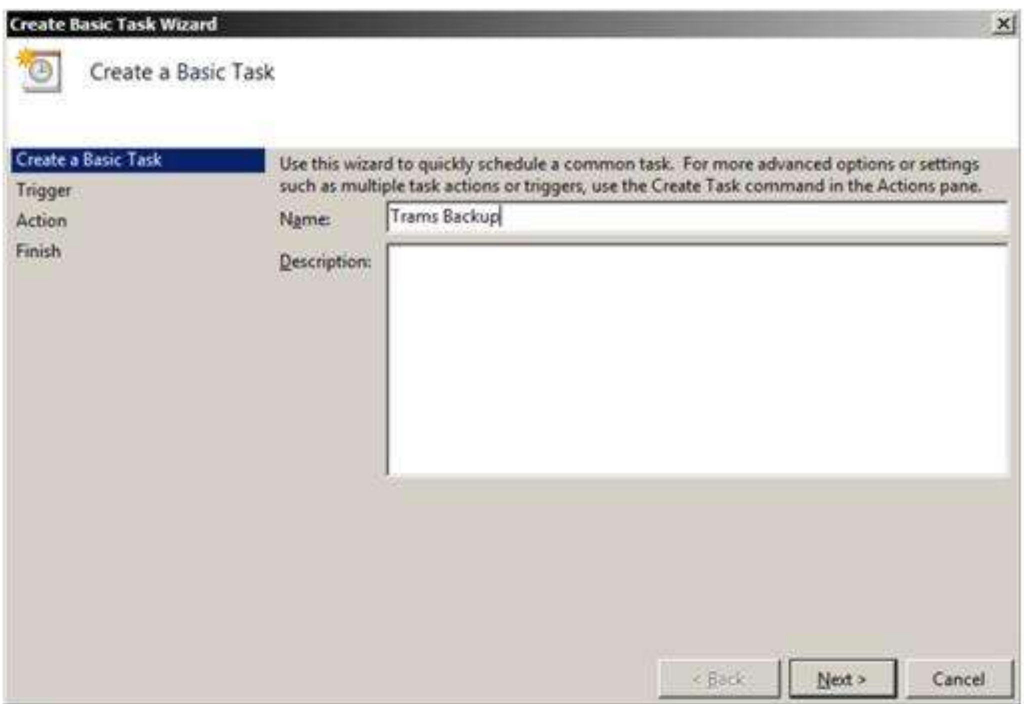
1. Open up Windows Task Scheduler

Click Start, Programs - Accessories - System Tools - Task Scheduler. Also you can click Start, and type "task" into the Start Menu Search box and Select Task Scheduler from the results, or open the Control Panel - Administrative Tools - Task Scheduler.

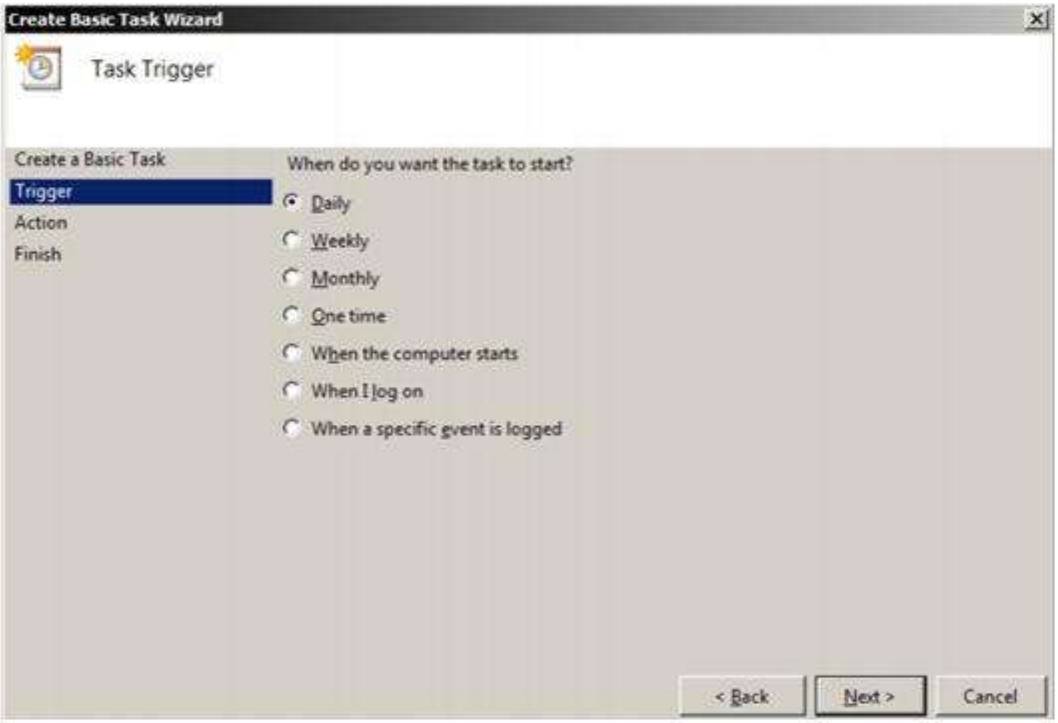
2. Select 'Create Basic Task' from the right hand pane and the 'Create Basic Task Wizard' will open.



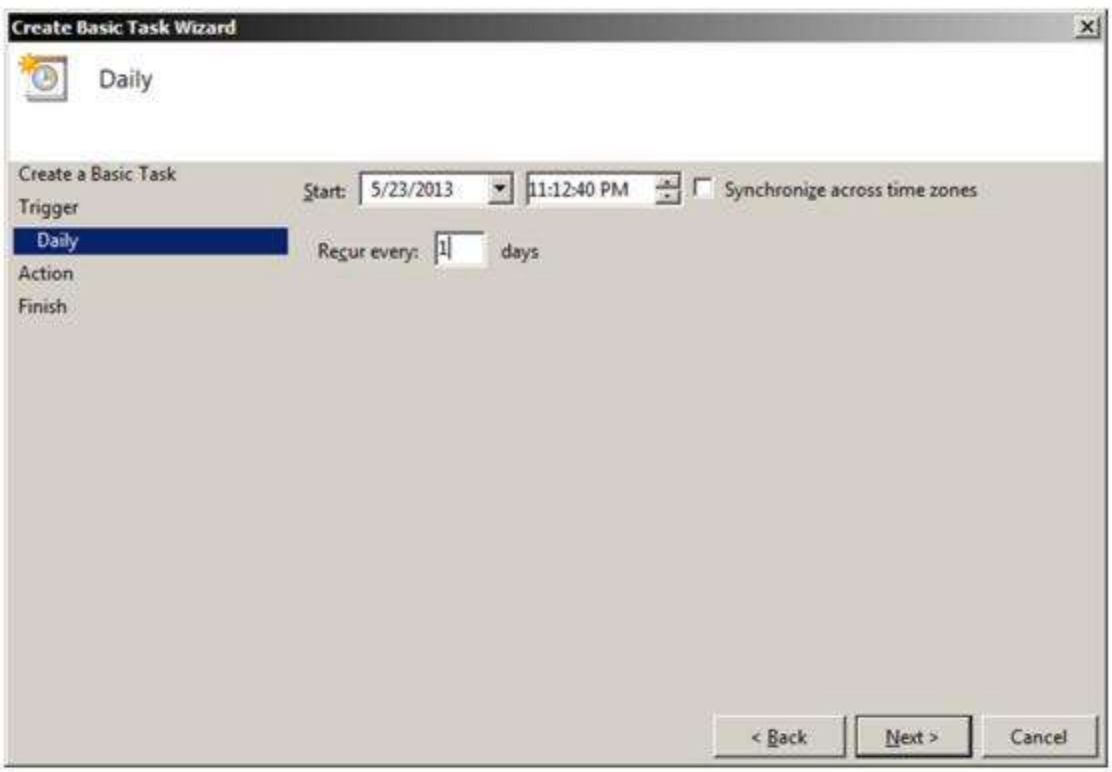
3. With the Wizard open, type a 'Name' (example TRAMS Backup) and 'Description' (optional) for this task. Click Next.



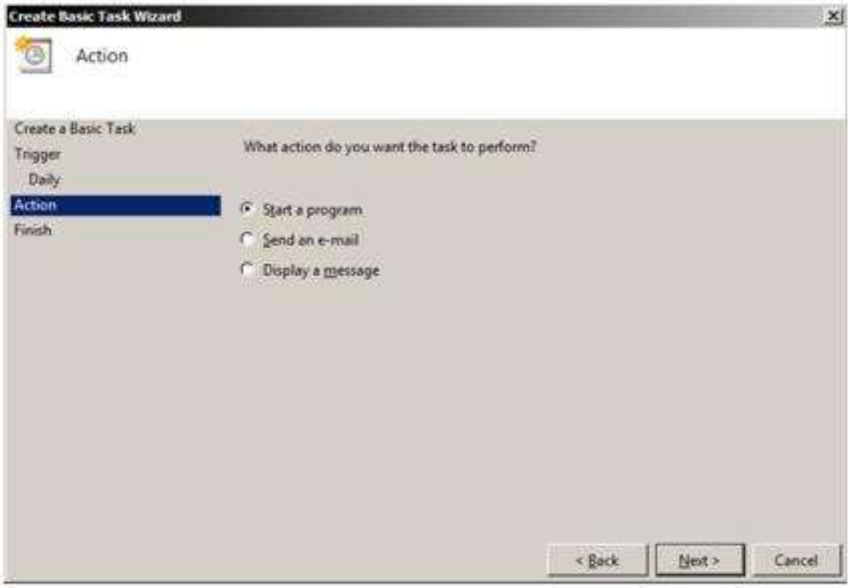
4. Select when you would like the event/task to run. Daily would be the most common and logical choice as we recommend a backup be done every day. Click Next.



5. Select the exact time and date at which you wish the first task to start (each task afterward will run based on your selection in step 3) then click Next. Automated backups are generally run in the evening, rather than during the work day. The computer must be on for the task to occur. Click Next.



6. Leave the action set to "Start a Program" and click Next.



**** Note, this next part is a little tricky, please try to follow the steps carefully.***

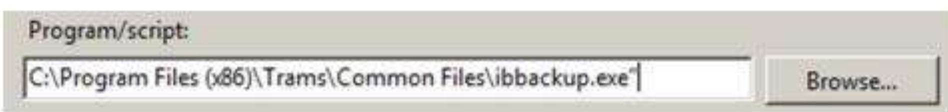
7. We copied the command line for the backup in the steps at the beginning of this document. Unfortunately, we need to split it up into the two boxes on this next screen and make a slight change to the Additional Arguments.

   a. First, right click in the Program/script box and select paste.

   b. Press the End key on your keyboard.

   c. Press the Backspace key to delete characters from the end of what you pasted, until you reach ibbackup.exe" and do not delete the quote mark.

   d. What you should have left is this (or something very similar):



   e. Alternatively, at this step, you could have clicked Browse… and found the ibbackup.exe program under the C drive, Program Files (x86)\Trams\Common Files.

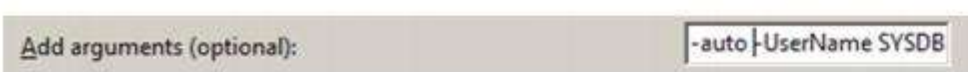
8. Next, we need to get the correct portion of that command line into the "Add Arguments" box.

   a. Right click in the "Add Arguments" box and select paste.

   b. Press the Home key on your keyboard.

   c. Press the Delete key (not Backspace) until you reach the first dash symbol, do not delete the dash. Next to the dash should be "UserName."

   d. With the cursor still at the left side of the box, type "-auto" and a space. What you should see is this:



   e.Click Next.

9. Check the box that says "Open the Properties dialog for this task when I click Finish." Click Finish.

10. Check the box that says Run with Highest Privileges.

11. Under the Security options, you can have the task run if the Windows user that created the task is logged on, but it would be more common to set it to "Run whether user is logged on or not." If you set this option, when you click on Okay, it will prompt you to enter your Windows password for this user.

<u>Additional Scheduled backup command line options for EUA enabled databases:</u>

-USERNAME <username>

-PASSWORD <password>

-ALIAS <database alias,database alias,...>

-DBPATH <database path>

-AUTO

-RESTORE

-COMPRESS

-VALIDATE

-DBUSERNAME <database username>

-DBPASSWORD <database password>

-ENCPWD <encrypted password>

-ENCDBPWD <encrypted password>

-DUMPFULL

-DUMPINCREMENTAL

-PAGESIZE <4096, 8192, 16384>

-LOGFILEPATH <path for log file>

-EMAILSERVER <email server name>

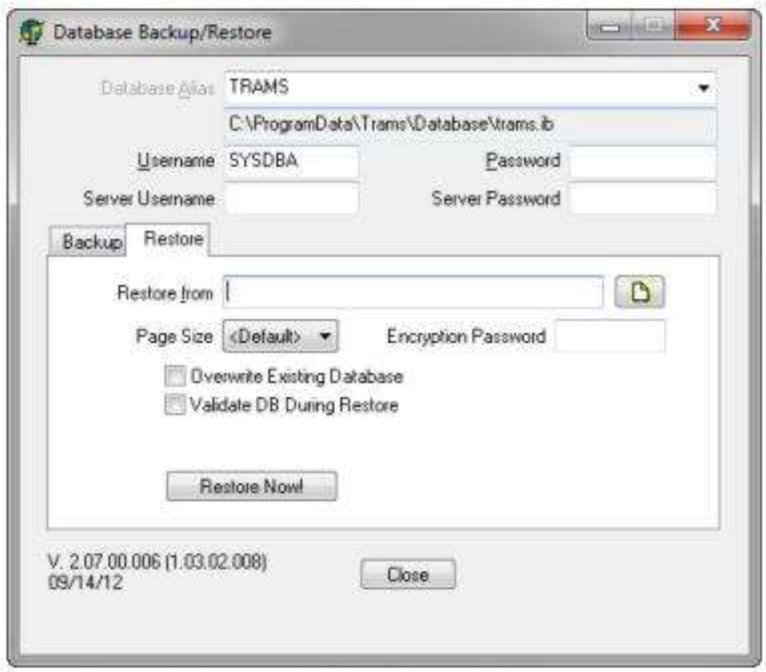
-EMAILTOADDR <recipient's email address>

-EMAILNOTIFYALL

Restore

NEVER restore the *Trams*.ib until the backup has been restored someplace else by following the procedures outlined below. The agency may be instructed by our support department to do a backup and then restore the database. This could be to re-index certain database tables or to troubleshoot some other issue. In any event, following these steps will ensure the integrity of the database backup, and will alleviate the possibility of restoring over an existing database. These steps should work for any version of Interbase, **but not for doing an upgrade of Interbase**.

Close out of TBO (and *ClientBase*) to restore data.



Select the *Restore Tab*. The restore function recovers backup data saved on medium that used the *Trams* backup function. *Restore* replaces current data files with those on the backup medium. This restore program **restores both *Trams Back Office* and *ClientBase* Data. Since the two programs share a common database, restore cannot be done on one without affecting the other.**

1) Make sure everyone is out of *ClientBase*, *Trams Back Office* and any other applications connecting to the database.

2) If the database is a Sync database, please go to scheduled tasks in the Control Panel in Windows. If the task that controls synchronization is currently running, please wait for it to finish (refresh the screen). Once it is not running (status Ready), disable the task by double- clicking it and un-checking the box that says *Enabled* and then clicking *Apply/Okay*.

3) Perform a backup of the database.

4) Shut down the Interbase Guardian service. Go to **Control Panel|Administrative Tools|Services** and then highlighting Interbase Guardian and clicking *Stop Service*. This will automatically stop the Interbase Server service as well.

5) In Windows Explorer go where the *Trams*.ib is located and rename it from *Trams*.ib to *Trams*.ib.old.

6) Start the Interbase Guardian Service (as before, the Interbase Server service will be updated automatically).

7) Restore the backup that was done in Step 2. It should not prompt that it's overwriting an existing database. Go to **Start|Programs|*Trams Back Office*|Database Backup**. Click on the Restore tab.

> **Database Alias:** *Database Alias* from the drop-down. This is the database which will be backed up.
>
> **Database Path**: By default below the *Database Alias* is the path where the data currently resides. This was setup in the Alias Utility.
>
> **Username:** By default the SYSDBA is the *Username.*
>
> **Password:** Enter the password for the SYSDBA.

Server Username/Server Password: In preparation for Password Management enhancements in *ClientBase Windows* and *Trams Back Office*, there are new fields on the Backup Utility called Server Username and Server Password. These fields should be left blank when performing a backup or restore.

Restore From: Enter or search for the drive, medium, or directory to which the backup was performed and find the *Trams*.gbk.zip file.

Page Size: The Page Size option with choices <default>, 4K, 8K and 16K (for Interbase 2007 and higher) are for users who have Interbase 2007 installed. Restoring a database with a larger page size results in a performance increase in the database. Typically the time needed for the database to send data requested by the application has been decreased up to 10% (comparing 4kb to 16 kb page size).

Encrypt Password: Type the password used when backing up and encrypting the database. When restoring a compressed backup that is password-protected, if the user specifies an invalid password, then the restore will fail. **Note:** When restoring a compressed backup that is password-protected, if the user specifies an invalid password, then the restore will fail. ***If the encryption password is lost, there is currently no method for recovering the password and the encrypted backup cannot be restored.***

Validate DB prior To Backup/Restore: The validate option works with both backup and restore steps. Validating on restore is a bit slower, but it ensures that the database is valid. Validating on the backup is much slower than a normal backup and the validation does not fix issues. A database that is restored and fails validation will have the db fail flag set. Users cannot log in until the restore is complete, regardless of whether validation is done.**Overwrite Existing Database:** Check here to overwrite the existing database.

8) Once verifying that the restore completed successfully, have everyone go back into *ClientBase* and/or TBO. (Leave the renamed database and the backup in place until everyone is satisfied that the system is working correctly).

9) If the Sync scheduled task was disabled in Step 2, go back into the sync task's properties and enable it.

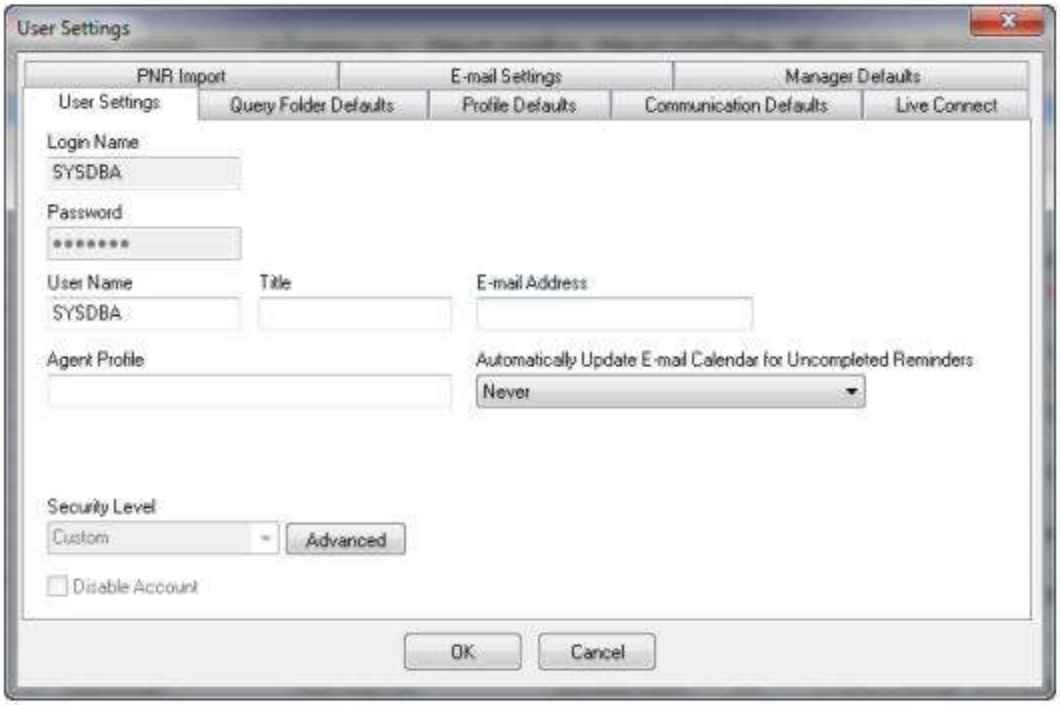
If there are any questions about these steps or there is any difficulty in following them, don't hesitate to contact our support department.

Access Code

When ready to renew your *ClientBase* subscription, you need to enter a new access code supplied to you by *Trams* Products and Services in this area to continue using *ClientBase*. Click **Utilities|Access Code** to enter the new code. You can get the new code by e-mailing Trams.Billing@Sabre.com.

My Login

To view personal login permissions and further customize *ClientBase* for your own workstation only, click *My Login* in the Utilities Menu:



User Settings: Enter/Modify *User Name, Title* and *E-mail Address.*

Automatically Update E-mail Calendar for Uncompleted Reminders: Enable the ability to update an E-mail calendar with Reminders created in *ClientBase*. Select from the drop-down:

Never: Reminders are never sent to the e-mail calendar.

All Reminders: All Open Reminders are sent to the e-mail calendar.

Only Reminders set for a Time - Only Open Reminders with a selected Start Time are sent to the e-mail calendar.

Only Reminders set with an Alarm - Only Open Reminders with the Set Alarm Box checked are sent to the e-mail calendar

The user's e-mail address is used for sending Reminders to the E-mail Calendar. If the user does not have an e-mail address entered in their User Settings, *Never* is the only setting that can be entered for this field.

When creating or editing reminders a new checkbox, *Update E-mail Calendar after Saving Changes* was added. When checked, updates are sent to user's e-mail address. This box is checked by default when the setting from User Settings is *All Reminders* or *Only for Reminders when time is set*.

Upon saving the Reminder, an e-mail is sent to the user. If the *Default E-mail Client setting is Outlook/MAPI Client or MAPI Client*, the e-mail includes the e-mail appointment setup screen as an attachment. Open the attachment and click *Save and Close* to save the Reminder to the e-mail calendar. If *Default E-mail Client setting is SMTP*, the e-mail appears as a meeting request and includes a link to the Activity. Click *Accept* to save the Reminder to the e-mail calendar.

Query Folder Defaults: Select the saved folder you want opened when logging into any *ClientBase* Managers **-** *Profile, Activity, Res Card,* and *Inventory.*

Profile Defaults: Select the Profile tab you want opened when entering a profile - *Leisure, Corporate, Vendor, Service Provider, Agent* and *Other.*

Communication Defaults: If you have a different country/area code than the agency default, enter it here along with any differing *Communication Defaults Settings for New Profiles.*

Live Connect: Enter your own unique login here for any Live Connect Providers your agency uses.

PNR Import: You may be required for PNR import to enter information here for this feature to work.

E-mail Settings: If your e-mail settings differ from default agency settings, enter settings here. You can also include a default e-mail signature if this has been set up under *Global Defaults.* For complete directions on setting up your e-mail settings, under the help files tab *Contents,* review the section entitled, *E-mail Marketing in ClientBase.*

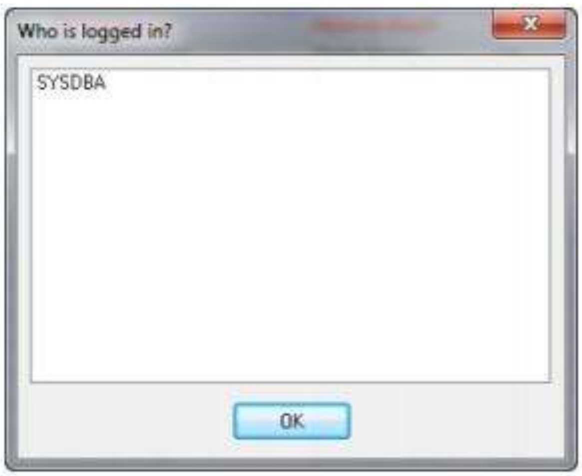
Manager Defaults: There's a tab within the *ClientBase* main Managers called *Home* which takes you to your private label's home page (for **Nexion, Signature, Vcom, Ensemble Users, and other new consortia that use our private label)** and auto logs you in via your *ClientBase* login. In order for this auto login to your private label's intranet to occur, each user must enter their login and password into their *ClientBase* User Login by going to **Utilities|My Login|Manager**. (SYSDBA login can enter for all users as well.) Once captured, your *ClientBase* login auto logs you into your private label's Intranet. The Intranet URL for your Private label comes defaulting starting with version 3.03 but can be updated or removed, if desired, by going to **Global Defaults|Manager Defaults|Home Page URL**.

For agencies not configured with a specific private labeled version of *ClientBase*, and those that participate in the *ClientBase* Marketing Services (CBMS) marketing program, you can enter your CBMS Login and Password into your *ClientBase* User Login here. (SYSDBA login can enter for all Users as well.) Once captured, your *ClientBase* login will auto log you into CBMS and access to your marketing calendar and other CBMS information becomes instantly available and right within *ClientBase*.

You can also select either *Home, Profiles, Activities, Res Cards or Internet* as the Login default *ClientBase* Manager from this area.

Who is Logged In?

If you are about to reset your server or restore data, view who is logged into *ClientBase* by clicking *Who is Logged In?* in the Utilities Menu:



This allows you to give fair warning and have users exit the program.

Profile Dupe Checker

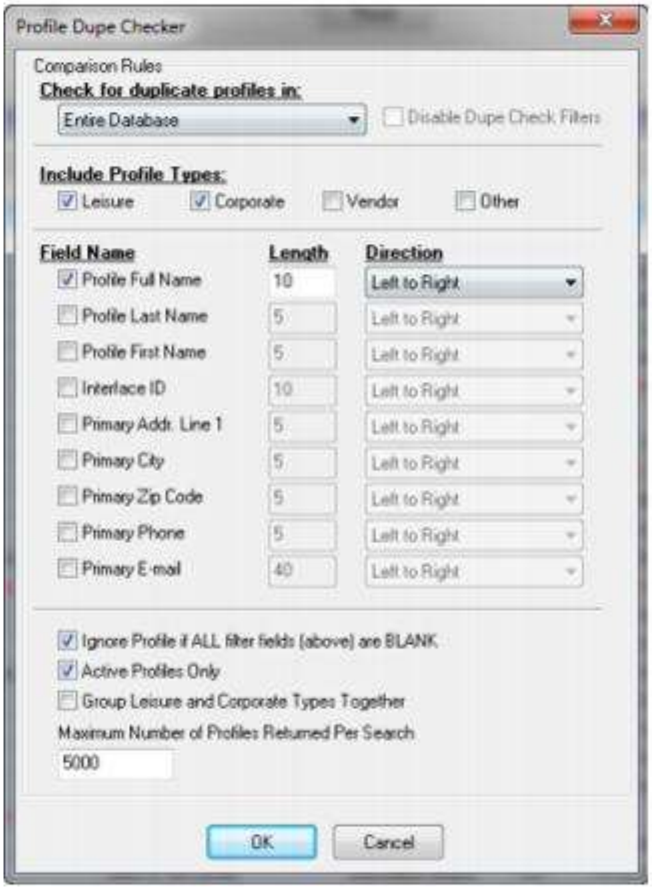
As your *ClientBase* customer database grows, so does the possibility of having duplicate profile records for the same entity. If you have *Trams Back Office*, you may already have loads of duplicate client and vendor profiles. Since duplications only water down the effectiveness of the database, a utility has been created in *ClientBase* to identify *possible* duplications in the system. Set one profile as the *master* and then merge the duplicate profiles into that master profile. Then you can delete, or mark as inactive, these unwanted profiles.

Suggestion: Run the Profile Dupe Checker once a month to keep the database dupe free.

Step 1: Backup your database using the *Trams* IBBackup utility by going to **Start|Programs|*Trams*|*Trams* Backup Restore**. (There is no "Undo Merge All" feature!)

Step 2: Access the Profile Dupe Checker. Go to **Utilities|Profile Dupe Checker**, right-mouse click in the results screen after performing a Level 1, 2, or 3 Query and click *Dupe Check,* or in the Profile Manager Screen, click the *Dupe Checker Results* tab and then *Filter* to access the Profile Dupe Checker utility.

Step 3: Do the Comparison. Designate the criteria with which the system searches and compares profiles. Be sure to include aggressive filters to narrow your results as much as possible. You do not want to merge profiles that really are not duplicate profiles after all.



Check for duplicate profiles in: From a drop-down menu, select the type of profiles to include in the duplicate search. Choices include *Entire Database, Current Results in Level 1 Query, Current Results in Level 2 Query,* and *Current Results in Level 3 Query.* If you do not want any filters on profiles, check *Disable Dupe Check Filters.*

Include Profile Types: Select the type of profiles to include in this duplicate search. Check any or all profile types by clicking once on the check box. (**Hint:** It may be easier to search for duplications one profile type at a time except in the case of Leisure/Corporate.)

Field Name, Length, Direction: Select the fields to compare and search for common entries. The fewer you select, the more results you are likely to find. The more you select, the more discriminating the system is in displaying possible duplications.

To select a field name, place a check in the box by clicking once. Then, the length of the field search and direction can be established. The length is a numeric field, indicating the number of characters within that field to be compared. Select the direction by clicking the arrow to the right of the field and choosing either *Right to Left* or *Left to Right*.

Keep it simple, perhaps using only the Last Name, Address 1, and Phone (or e-mail) as criteria. By default *Ignore Profile if ALL filter fields (above) are BLANK* is checked*.* Also defaulted is the checked box, *Active Profiles Only* if you don't want to include profiles that have been designated as "inactive." Since duplicates can exist within inactive profiles, unchecking this box may produce more thorough results. To display duplicate corporate and leisure profiles grouped together, check *Group Leisure and Corporate Types Together*.

The system compares profiles, then displays a list of all those with common elements sorted by the fields used as search criteria. For example, if last name and e-mail are the search fields, all profiles with the same last name and e-mail are listed together shaded in gray or blue in the results screen of the profile manager under the Dupe Checker Results tab.

Keep in mind the resulting profiles with common data may not actually be a duplication of the same customer. For example, if the criteria entered for doing the comparison are last name and first name, your results may include different customers with the same name.

Step 4: Decide which profile to use as the *Master* (the one that information is merged into). You can manually select the Master profile from within each dupe grouping by clicking on the desired Master Profile and clicking *Set as Master*. You can also use *Auto Set Your Masters* which allows you to set a Master for every dupe grouping all at one time by using the profile within each that has either the *Earliest Creation Date, Latest Creation Date, Earliest Modified Date* or *Latest Modified Date*.

(When using *Auto Set Masters*, be sure to follow step 5 below.)

Step 5: Review your entire listing of possible dupe groupings to identify any groupings that are not definitely duplicate profiles and un-select the master profile so they do not result in merging. For example, your Dupe Check results may include 100 profiles made up of 40 possible dupe groupings. You may determine that 5 of those possible dupe groupings may not be dupes and so you do not want to merge them. Be sure to un-set those Masters so they do not get merged. This is done by individually highlighting each undesired Master (the profile in red) and clicking *Set as Master*, a button, which toggles between set and un-set as Master (profile is no longer in red). Any dupe grouping without a Master set will not get merged. You can also use this technique to change the Master profile set by the *Auto Set Master* feature in the cases where you would prefer a different master than the one selected by the *Auto Set Master*.

WARNING: The AUTO SET MASTER FEATURE method of performing a profile dupe check may results in errors to your database. It is best advised to call support for guidance before using this method. Also make sure you have taken a recent backup.

Step 6: Next, highlight the profile you want to merge into the master and click *Merge* if you are merging profiles one at time, or *Merge All* if you want to merge each grouping of dupes within the Dupe Check results that has a *Master* profile set for that grouping, all at one time.

Upon clicking either *Merge* or *Merge All*, the system prompts with a screen that allows you to select and include merging data from the following profile tabs: *Addresses, Communications, Special Dates, Cards, PNR Entries, Travelers/Contacts, Groups* and *Attachments.* (The system automatically merges all Activities, Marketing Codes, Res Cards, Invoices, Payments and Unapplied Balanced from the duplicate profile into the profile designated as the Master profile.)

When including any of these tabs of data in the profile merge, all data is appended to existing data within the master profile and removed from the duplicate profile. Place a check next to each tab you choose to include in the merge. These check marks are saved locally and will be "remembered" the next time you merge profiles from the Dupe Check feature.

Delete Profile/Set Profile to Inactive: Once deleted, all data from the old profile not included in the merge is erased. If you are unsure you may want to say no to deleting and mark these profiles, once merged into the master, as inactive instead.

Upon clicking *OK,* the merge takes place. If you have selected *Merge All* you will receive a prompt with a message *XX Profiles will be merged into 14 Masters. Merge ALL profiles to their Masters?* Verify that the numbers align with what you are trying to merge before selecting OK.

Note: The Profile Dupe Checker routine works with the ability to link Traveler records to multiple profiles. When a Traveler is merged to a master profile, a new Traveler Link record is created. When the option to Delete Profile after merging is selected, the Traveler records are not deleted; the Link record is deleted instead.

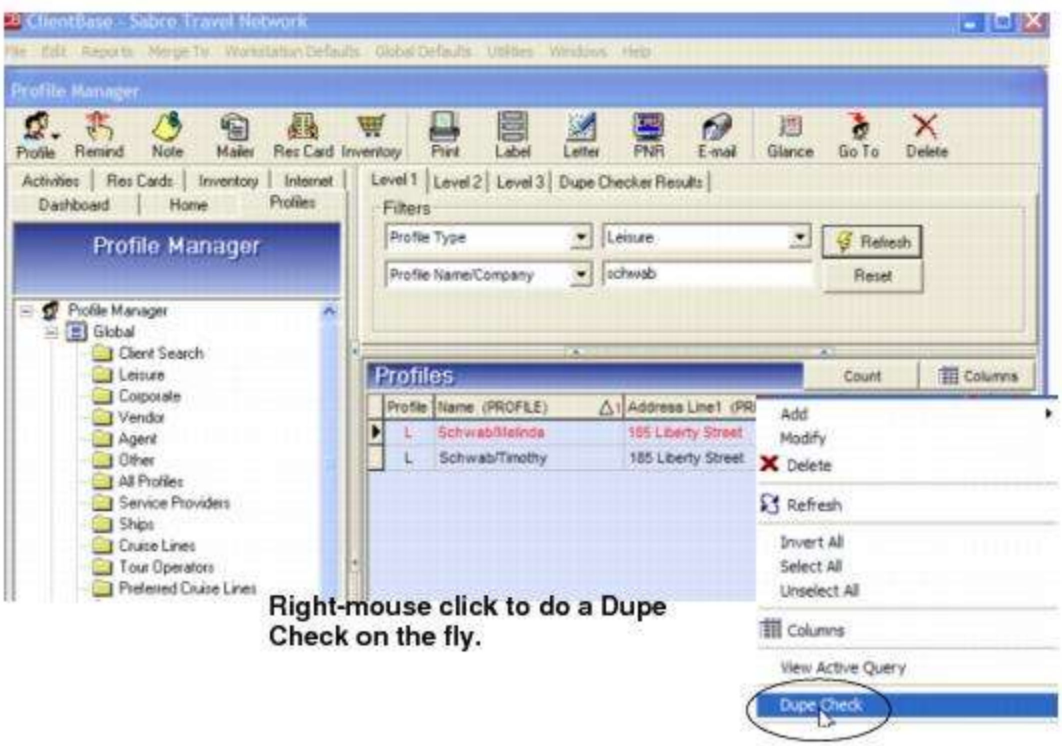
Note: Sync Activated databases can only be set to inactive rather than deleted upon merging. This setting has been hard-coded to reduce the potential for unresolved items to occur during synchronization as the result of one location updating a profile while the other location is deleting that profile via Dupe Checker.

***Important Note:** Steps 1 and 5 are the most important steps within this process. Once a profile is merged to another, there is no way to "un-merge" them so you want to be very careful that you review the listing of potential dupes and unset any Masters that you have any question are not actually duplicate profiles. We also recommend that you limit access to this feature via your *ClientBase* User permission settings (go to **Advanced Permissions|Menu Options** and uncheck *Profile Dupe Checker* within the Utilities menu options when you set user up by going in as SYSDBA and clicking **Utilities|User Logins**). Consider this a power tool that should be used with great caution and proper training.

Step 6: Maintain Regular Dupe Checker Schedule. Maintaining a rich (yet clean) database of accurate customer information improves the effectiveness of every marketing effort. Run the dupe checker regularly to eliminate duplicate profiles.

Run Dupe Checker from Level 1, 2, or 3 Query

Ever spot duplicate profiles while working in the profile manager queries and want to merge them right then and there? Now you can.



Simply right-click anywhere on your current Query results and select *Dupe Check* from the listing; or, click the Dupe Checker Results Tab and *Filter*. By default the Dupe Checker routine is run on the entire database, but a field called *Check for duplicate profiles in,* allows you to setup using: *Entire Database, Current Results in Level 1 Query, Current Results in Level 2 Query,* or *Current Results in Level 3 Query*.

If set to *Using the Current Results,* rather than the *Entire Database*, by default the *Disable Dupe Check Filters* are checked, and by clicking *OK,* you obtain the current Query results displayed in the Dupe Checker window, so that you can use the *Merge to Master* feature. 2

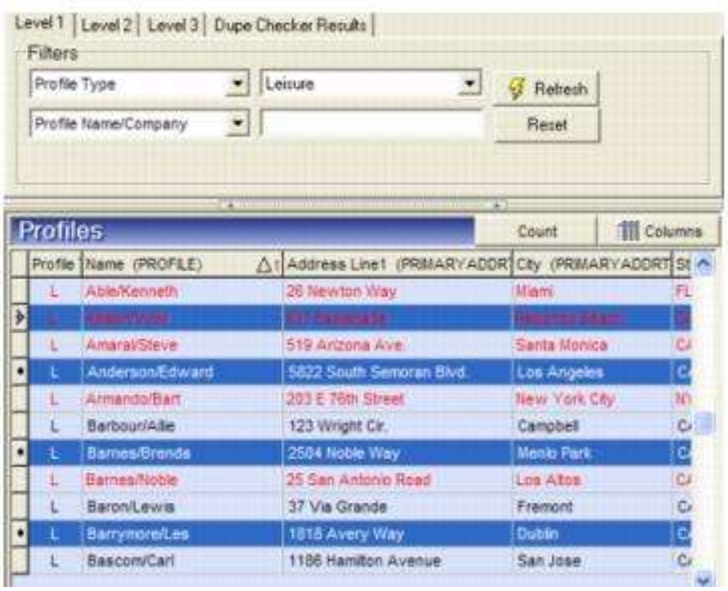
Global Modify

Global Modify allows you to change multiple profiles, activities, or Res Cards simultaneously without having to enter each to make the desired change. For example, you have an agent who left your company and you want to replace the former agent's name in profiles with the new one. Or you want to globally modify all primary e-mails with a marketing permission of *Yes* or add or remove a marketing code. You can also use the global modify feature to add, remove, or change profile group names or change the Res Card fields. Adding, replacing, or exchanging fields and codes using global modify is an easy and efficient way to make necessary changes in the database.

Step 1: Backup. When you use global modify, you make permanent and automatic changes, therefore, we suggest you backup the database before using this feature. In doing so, you are covered in case you change something unintentionally. If you have a backup, you have the option to overwrite the changes you have made and try again. To back up your database, go to **Start|Programs|*Trams*|*Trams* Back up/Restore**. See the *Backing Up* and *Restoring* sections of this chapter for further details.

Step 2: Query your Database. Use the *Profile, Activity and Res Card Manager* to Query for the profiles, activities or Res Cards to modify. When you have the desired Query results, modify all results at once or hold down the Ctrl key and use your mouse to select the profiles you want to change. You can also right mouse click in the Results Screen or click **Edit** on the menu bar to *Invert All, Select All* or *Unselect All.*

Use Ctrl and mouse to select specific profile records you want to globally modify. If you want to globally modify every other, BUT NOT the ones selected, right-mouse click in the results screen, and *Invert All.*



Step 3: Once you queried and selected the records to modify, select **Utilities|Global Modify***.*

<u>**Globally Modifying Profiles:**</u> Select *Set Value* or *Exchange With.* Fields available to modify:

Profile: *Last Name, First Name, Middle Name, Courtesy Title, Additional Name, Interface ID, Primary Agent, Branch, Web ID, Web Password, Referred By, Salutation, Creation Date, Create By, Active, Vendor Commission % (Vendor Only), Travel Category (Vendor Only)*

[**Hint:** If Address Line 1 was used in the past to capture an additional name, Global Modify that name into the new Additional Name field. Next, Global Modify the actual address information from Address Line 2 into Address Line 1.]

Primary PhoneTable/FaxTable: *Country Code, Area Code*

PhoneTable, FaxTable, E-mailTable: *Marketing Permission*

PrimaryAddrTable, BillToAddrTable, ShipToAddrTable, AlternateAddrTable: *Address Line 1/Line 2, Apt/Suite, City, State, Zip Code, Country, Description*

More Fields

Marketing Codes: *Add or remove marketing codes from Query results.*

Groups: *Add or remove groups from Query results.*

Globally Modifying Activities: Globally modify Activities or Profiles to which Activities are linked. Select *Set Value* or *Convert Type.* Select *Activity to Modify (Reminders, Notes, Mailers).* Fields available to modify:

Activity: *Date of Reminder, To Do, Login/Created Name, Priority, Private, Type, Subject, Completed, Remarks.*

Globally Modifying Res Cards: Globally modify Res Cards or Profiles to which the Res Cards are linked. Fields available to modify:

Rescard: *Status, ResCycle, Create Agent, Marketing Source, Group Name, Branch #, Trip Name, Locator #,* and *Region/Destination*

Step 4: Identify Records to Include. On the bottom right side of the Profile Fields and the Marketing fields screen, there is a setting called *Include Records*. This defines whether to use all the profiles that are in the profile Query result screen, or use only ones that have been highlighted and selected. You also have the ability to apply changes to a range of profiles within the current results. When selecting *Range (Mth to Nth),* enter the range of profiles you want to global modify. This range is based on the line number from and to within the results of the current Query.

Step 5: Click Global Modify Now. Finally, select *Global Modify Now*. Confirm that you want to global modify. Remember, this makes an automatic change that is not reversible. Please check your steps carefully before committing (remember to make a good backup first). Click *Yes* to continue or *No* to cancel. You are notified once the global modify is complete, and see statistics of how many of the total records were skipped or modified.

Note: When Global Modifying a formatted More Field, Global Modify detects what the Format Type is and use the rule that applies. When global modifying a More Field you can only set or exchange the value with the same format type as the existing one. *For example:* If More Field has the Format Type of Numbers Only, when modifying, you can only set or exchange the value to another numeric value. If incorrect value is entered a message is displayed informing you of the proper format.

Note: Because the Primary Traveler checkbox has been added in ClientBase v.3.08, agencies may wish to use Global Modify to change the Primary relationship to another value, as the new checkbox provides a better way to identify Primary Travelers.

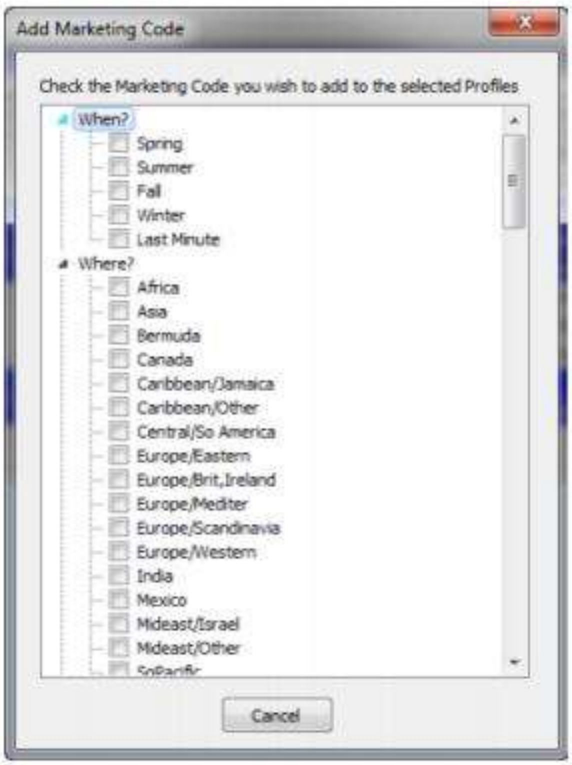
Therefore, the field PROFILE.Traveler Relationship was added to the Profile Fields tab in the Global Modify tool. With a Traveler column included in the results of a query, it is now possible to use Global Modify to change the relationship of the Travelers to their Profiles in a batch.

The Profile Dupe Checker routine now works with the ability to link Traveler records to multiple profiles. When a Traveler is merged to a master profile, a new Traveler Link record is created. When the option to Delete Profile after merging is selected, the Traveler records are not deleted; the Link record is deleted instead.

Partial Global Modify for Marketing Codes

Need your agents help with efficiently coding your client profiles with the proper marketing codes, but afraid to give them the ability to use the full Global Modify feature? You are not alone, so we added the ability to add one marketing code at a time, but to multiple profile results directly from the Profile Manager Query results. The next time you have a deluxe cruise promotion, for example, ask your agents to Query their client profiles and from the results hold down the <Ctrl> key while clicking on each client record that you would like to identify as a deluxe cruiser. After all desired profiles from the list have been selected (highlighted), use the mouse and right-click and select Add Marketing Code from the options.

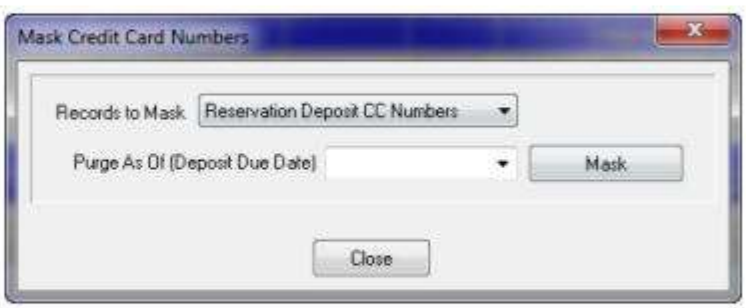
First add the marketing code for Deluxe (you will be prompted with a message *Add Deluxe to Selected Results in Profile Manager*). Then right-click again and add the marketing code for Cruisers.



Mask Credit Card Number

Remove credit card information for Payments, Booking CommTrack CC Numbers, and Reservation Deposit CC Numbers that may no longer be of use. To use this feature the database must be credit card encrypted. Masking the credit card number removes the full encrypted credit card number and replaces it with a masked version of the number.

Go to **Utilities|Mask Credit Card Number**:



In the Records to Mask field, choose the type of record to remove from the drop-down. *ClientBase* only database options for removal are *Payments, Booking CommTrack CC Numbers and Reservation Deposit CC Numbers*. *ClientBase* databases that are *Trams Back Office* also, can only remove *Reservation Deposit CC Numbers*. Payments and Booking CommTrack CC Numbers affect accounting data and therefore removal must occur in the TBO program.

In the *Purge As Of* field, enter the Purge Date. For example, if you wanted to remove records prior to 01/01/2008, the Purge Date is 12/31/2007. Records are removed by date as follows:

Payments (by Payment Date)

Booking CommTrack CC Numbers (by Depart Date)

Reservation Deposit CC Numbers (by Deposit Due Date)

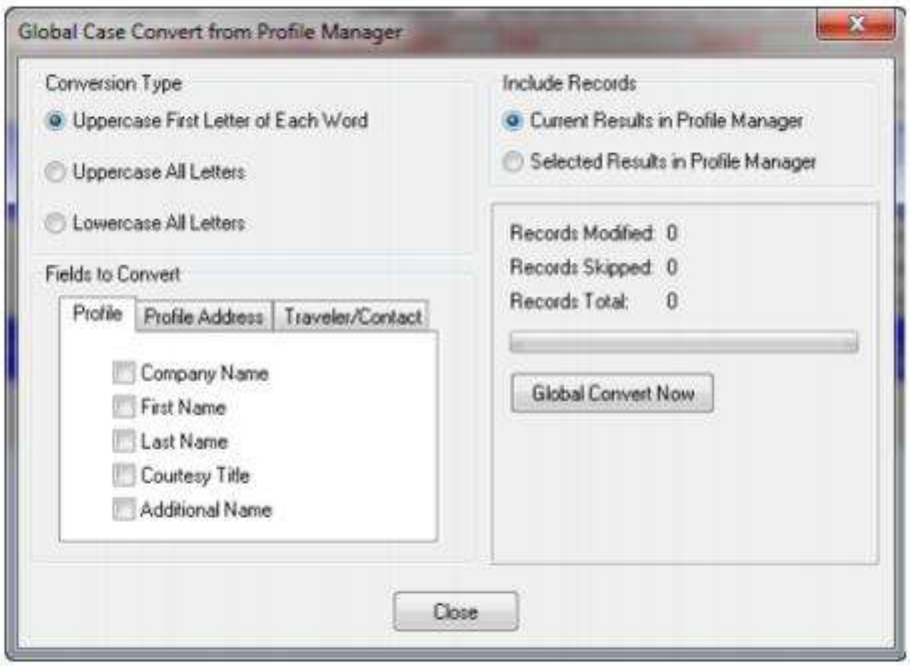
After entering the purge date, click *Mask*. A message appears indicating what type of records will be masked and as of what date. Click *Yes* to continue or *No* to return to the selection criteria.

Case Converter

The Case Converter takes the results of a current Query and automatically converts the case for selected fields.

Step 1: Use the Profile Manager, Activity Manager, or Res Card Manager Queries to Query the profiles to run the case converter on.

Step 2: Go to **Utilities|Case Converter** to access the utility.



Step 3: Select *Conversion Type* which determines how you would like the case converter utility to change the case of the selected fields. Select either *Upper Case First Letter of Each Word, Upper Case all Letters, or Lower Case all Letters*.

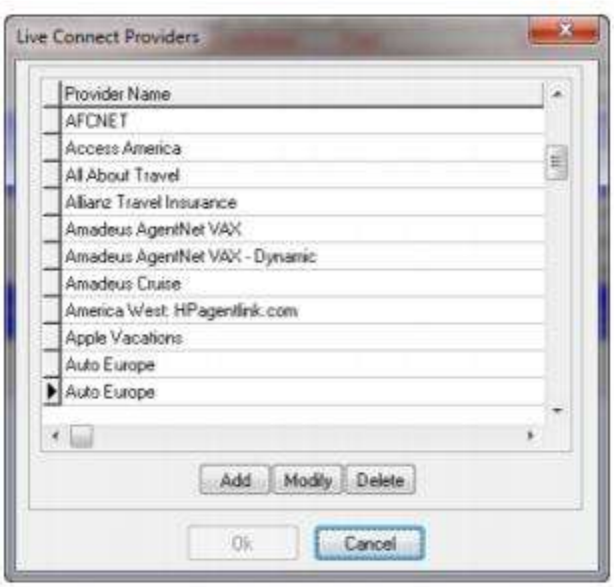
Step 4: Select the *Fields to Convert*. Place a check into each field convert, including Profile, Address and Traveler/Contact fields.

Step 5: Select either *Current Results* or *Select Results*.

Step 6: Click *Global Convert Now* to run the case conversion utility. Displayed is the number of records affected by the conversion.

Live Connect Providers

ClientBase comes defaulted with the proper URL for each Live Connect provider, but this default URL can be changed from within the Utilities menu by clicking *Modify* in case the Live Connect booking engine changes URL's between releases of *ClientBase*.



Also if we add a new booking engine between releases, we send an announcement to all *ClientBase* subscribers with the URL details including *Travel Category* and *Import XML From*, so you have the option of adding them to your Live Connect listing, and don't have to wait for a new software update. If you want to make a Live Connect Provider inactive, click *Status|Inactive.*

Include Authentication is a setting used only by Live Connect Providers that include an additional authentication step in their login process. It is only checked if the Live Connect Provider setup instructions specify so. When implemented, it allows for *ClientBase* to first authenticate the User Login and Password via the booking engine's authentication security layer, obtain an authentication code, and then repost to the booking engine URL with the authentication code in addition to the login and client data.

Chapter 22: Exporting Profiles

This section demonstrates how to export data from ClientBase into files for use outside the program.

Introduction

ClientBase provides agencies with the ability to export data in three different ways. In the chapter, **Putting Your Profiles to Work for You**, we demonstrated how the results of a Query with standard fields such as Name, Address, City, State, Zip and Phone Number can be merged to a file. Many agencies use the Merge to File or Merge to File Handoff options to send data to outside mailing houses.

However, there is a third, more robust export option in *ClientBase*. It is the File Export menu item providing the capability to export even more *ClientBase* data into files. This exported data can be used in site design or for loading into other software programs.

ASCII Delimited Text Files

ClientBase exports its (.txt) files utilizing the ASCII format (American Standard Code for Information Interchange). Using a standardized coding scheme, various computer programs are able to exchange information.

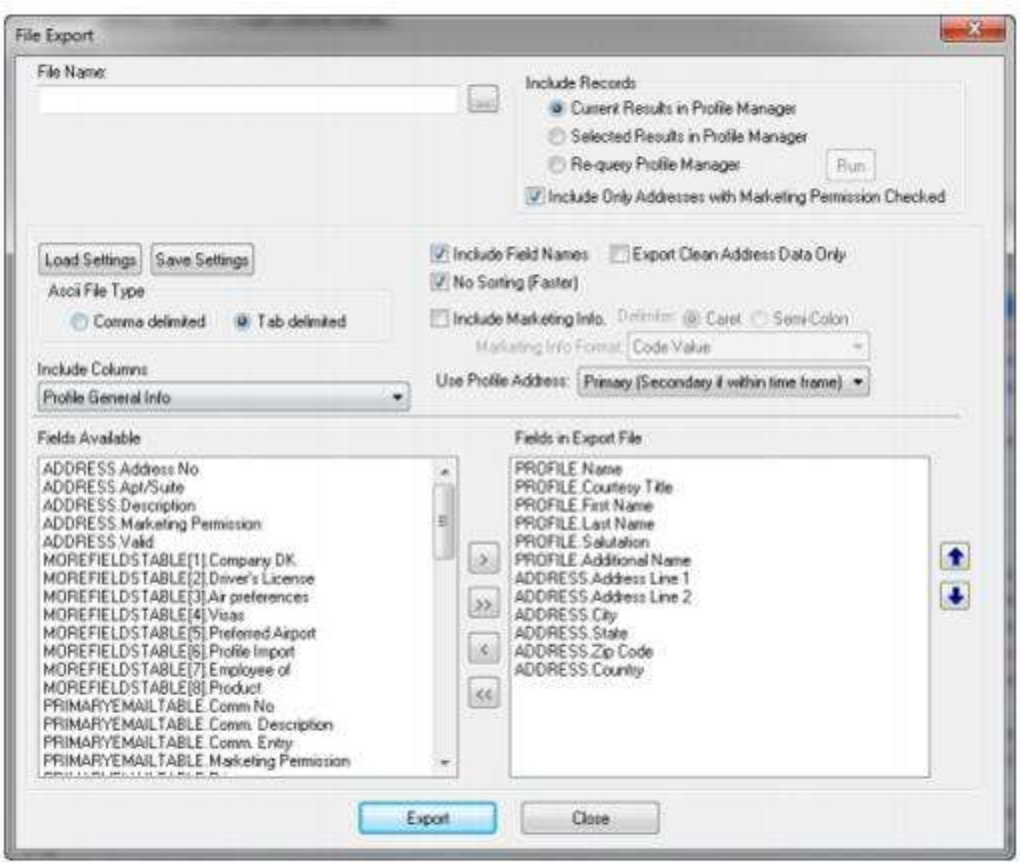
Each record in the file includes information such as Name, Address 1, Address 2, City, etc. To recognize when one field ends and another field begins, a *delimiter* is used, separating each field. This delimiter is a character and in *ClientBase* can be either a **tab** or a **comma** in primary columns; or a **caret** or **semi-colon** in sub columns such as marketing codes within the marketing tables.

Exporting Files

1) It is suggested that you obtain the assistance of a Trams Support Rep to export successfully from this area. More than one file needs to be created from this area.

When importing this data, the Profile General Info file is imported basically as-is first using the Import Utility, but no Traveler fields are mapped. Then a second file is created and imported containing Traveler Info. In the Import Utility, the *Update Rule* must be set to *Update if the INTERFACEID matches,* and the file is mapped to the *Profile Type* and *Profile Interface ID*. By skipping forward in the utility to the Traveler fields, mapping is then completed in the second file **ONLY** to the first Traveler. Then the file is imported.

To create the first file for export, go to **File|Export** in the *ClientBase* menu:



File Name: Start the Export File process by naming the new file and selecting its location by clicking on the three dots to the right of the File Name field.

IMPORTANT NOTE TO FREQUENT USERS OF THIS FEATURE! Load File/Save File: After identifying the ASCII file type, selecting your various format options and selecting the fields to include within the file export, click the Save Settings button and create a .map file which saves these export settings for future use. To load these defaults settings saved in the .map file, click Load Settings. Locate the previously saved .map file and upon selecting all export settings are completed by default. The export file name and the records to include within the export still need to be completed.

2) Set Up the Following:

ASCII File Type: Select Comma or Tab Delimiters.

Include Columns: From the drop-down menu, select which columns items to include - *Profile General Information, Profile Marketing Information, Profile Traveler Information, or Profile Card Information*. Each selection has an extensive list of fields available for inclusion in the exported file.

Include Records: To determine which profile records are included in the export file, select Current Results in Profile Manager, Selected Results in Profile Manager or ReQuery Profile Manager.

Include Field Names: Check this box to include field names (also known as headers) in the export file.

Export Clean Address Data Only: Check here to exclude incomplete addresses in export file.

No Sorting: Check here to create a file that is not sorted. This lessens compilation time.

Include Marketing Information: If the *Include Columns* is set to *Profile General Information*, then this checkbox appears. If in addition to the fields included in the General Information folder of a profile, you want to include the marketing categories and codes in the Marketing folder, check this box. Upon selection, notice the Marketing Information delimiter - either a caret (default) or a semi-colon. Each marketing category is separated with a comma or tab (as designated in ASCII File Type), and multiple codes within a category are separated with either the caret or semi-colon depending on which is selected here.

Fields Available/Fields in Export Files: Based upon the item selected in the *Include Columns* field, a listing of *Fields Available* is included to the left. This listing represents all fields that to include in the export file.

To change a field, move the highlighted field 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 and use the **>** or **<** arrows. By using the control key and your mouse, you can select non-consecutive entries to move. Use **up** and **down** arrows to order your selections.

General Fields Available for Export:

PROFILE.Profile Type

PROFILE.Interface ID

PROFILE.Name

PROFILE.Courtesy Title

PROFILE.First Name

PROFILE.Last Name

PROFILE.Salutation

PROFILE.Additional Name

PROFILE.Web ID

PROFILE.Web Password

ADDRESS.Address Line1

ADDRESS.Address Line2

ADDRESS.Apt/Suite

ADDRESS.City

ADDRESS.State

ADDRESS.Zip Code

ADDRESS.Country

PROFILE.Referred By

PROFILE.Primary Agent Name

PROFILE.Middle Name

PRIMARYPHONETABLE.Communication Entry

PRIMARYPHONETABLE.Communication Desc.

PRIMARYFAXTABLE.Communication Entry

PRIMARYFAXTABLE.Communication Desc.

PRIMARYEMAILTABLE.Communication Entry

PRIMARYEMAILTABLE.Communication Desc.

PRIMARYEMAILTABLE.Marketing Permission

PRIMARYWEBSITETABLE.Communication Entry

PRIMARYWEBSITETABLE.Communication Desc.1

Optional Fields: PROFILE.Create By, PROFILE.Creation Date, PROFILE.Modified By, PROFILE.Modified Date

3) ***Export.*** Once selected fields are included, click *Export* to complete the export and generate the first file.

4) ***Create a second file for traveler information following directions above using*** **Profile Traveler Info Columns*.*** File is created in Level 3 where the Interface ID is not blank. The import will match up on the Interface ID to load travelers on the correct client profile.

Traveler Fields (only ones that can be exported):

TRAVELER.Name

TRAVELER.Department

TRAVELER.Courtesy Title

TRAVELER.Last Name

TRAVELER.First Name

TRAVELER.Middle Name

TRAVELER.Relationship

TRAVELER.Citizenship

TRAVELER.Gender

TRAVELER.Passport Number

TRAVELER.Passport Expire

TRAVELER.Passport Issue Date

TRAVELER.Passport Issuing City

TRAVELER.Passport Issuing Country

TRAVELER.Passport Number 2

TRAVELER.Passport Expire 2

TRAVELER.Passport Issue Date 2

TRAVELER.Passport Issuing City 2

TRAVELER.Passport Issuing Country 2

PROFILE.Profile Type

PROFILE.Interface ID

Note About Exporting Cards: Although you can export some card information into Excel, this data cannot be imported into ClientBase. The file will contain masked Credit Card #'s for PCI Compliance.

Chapter 23: Synchronize Primary Location Database with Multiple Locations

This document provides steps on how to synchronize a primary location's database with multiple locations using the ClientBase Synchronization utility. Set up on-going synchronization manually or automatically using Windows Task Scheduler, or by using Trams Sync Web Service.

What is ClientBase Synchronization?

Some agencies with multiple locations or remote access needs wish to maintain a separate copy of their *ClientBase* database within each location because they lack high speed modems or remote access technology necessary to connect to a single, centralized database. For these agencies, *ClientBase* has created a utility that includes the ability to create a "sync copy" of the primary database for use in multiple locations.

(This utility does not allow you to merge two unique databases.)

What is Trams Sync Web Service?

When you set up your primary database to be synced with multiple locations, you choose how the sync files are communicated between locations. You may setup the synchronization files to be communicated as save to file or Web Services. After an Initial Sync Out/Sync In, you can use Windows Task Scheduler to automatically update both the primary and branch locations' databases.

For this reason and preferably, an alternative way to communicate the sync files between locations is via the ***Trams* Sync Web Service** which acts as an intelligent automatic "Post Office". After a relatively easy initial setup of your primary and branch databases' sync files on the *Trams* Sync Web Service, the Web Service actually checks to see what is needed in the next update for each location, be it Sync In or Sync Out files, and pulls the precise file that each location needs without any hands-on. To find out more about the *Trams* Sync Web Service, e-mail **Trams.Billing@sabre.com**. After you have signed up, **a *Trams* Implementation Specialist will guide you through the initial setup and scheduled routines. Please wait for their call, as this process can be complicated without their guidance.**

Please refer to the chapter *Synchronize the Primary Database with a Trams Hosted Copy* for complete setup details.

How Synchronization Works

If you choose to set up your sync routine by syncing to a file, follow directions in this section. All information connected to Profiles, Activities, Res Cards and Invoices can be synchronized between the primary location's database and multiple locations' databases. To start the process, an "Initial Sync Out" is performed from the primary database and an "Initial Sync In" is performed at each of the other locations. This process is not automatic.

As the databases are used and changed, on-going "Sync Out" files are created by all locations and automatically sent to the primary database location. The primary location handles these changes by automatically doing a "Sync In" from each location to update the primary database. It then does an automatic "Sync Out" of this updated database to the other database locations. These locations then automatically do a "Sync In" and have the updates from all the locations.

The sync files created by the *ClientBase* on-going synchronization process are quite small as they only include the records within the given profiles that have been added or changed. This on-going "Sync Out" and "Sync In" process can be performed manually (not suggested) or automatically (**preferred**) by using the Windows Task Scheduler.

In this section we cover the steps you need to set up and maintain synchronization:

1) Preparing Your Primary Database for Synchronization

2) Schedule an Appointment for One-Time Setup Process

3) Summary of Synchronization Process for Multiple Locations

4) Running the Initial Sync Out and Initial Sync In Routines

5) Create a Routine for On-going Synchronization including creating a Scheduled Task to Automate the On-going Sync Out and Sync In

6) Handling Issues Sent to the Unresolved Log

7) Synchronization FAQ’s

Preparing Primary Database for Synchronization

The Primary database is where the synchronization process begins and is used to create the copy for your remote locations. Please take the following steps in your Primary database **BEFORE** you begin the Initial Synchronization process:

- *If you currently have more than one database because of remote access challenges, you must consolidate those databases into one Primary database (the one used by Trams Back Office if you use that program) in order to establish the synchronization process. Please contact our Trams support desk for assistance with this at Trams.Sync@sabre.com, as they can review the tools we have that can assist you with this, including our ASCII Export/Import, and our XML Export/Import utilities.*
- *If you are new to ClientBase, you must first install the ClientBase program in your Primary location and set up the database to reflect the profiles, user logins and defaults that you would like to start each location off with. If you already have ClientBase installed, you must be on version **3.05** or higher, and if you are a Trams Back Office subscriber, you must be on Trams Back Office version **2.9.4** or higher.*
- *You need to obtain a separate and unique Serial # and Access Code for your Sync Copy databases, in addition to the Serial # and Access Code for your Primary database. Please contact our marketing department at Trams.Billing@sabre.com for this information if you do not already have them.*
- *Perform a **backup** of your primary database prior to running your Initial Sync Out. Archive this backup in case it is ever needed in the future.*
- *Verify if your database is encrypted by going to **Help|About.** If you want an encrypted database, you will need to encrypt before the initial sync out. Implementation can assist you with this.*

Schedule an Appointment for One-Time Setup Process

Once you have completed the steps above and prepared for synchronization, e-mail the following details so that we can schedule an appointment to walk you through the one-time setup process. All details below must be provided to **Trams.Implementation@sabre.com** in order to begin a setup appointment (they will be calling you as well to get these details and set up appointment).

Agency Name:

Agency City, State:

Agency Contact:

Phone:

E-mail:

***ClientBase* Version:**

***Trams Back Office* Version:**

***ClientBase* Serial #:**

Windows Login and Password for the designated Sync Out computer:

Date of Last Backup:

Summary of Synch Process for Remote Locations

- *ClientBase designates the PRIMARY database location as the location where Trams Back Office is being maintained. The other database locations are designated as the SYNC COPY database locations.*

- *The PRIMARY database location needs to install ClientBase and set up the database to reflect the profiles, branch info, user logins and defaults that they would like to start each location off with.*
- *The SYNC COPY database locations need to install ClientBase and make no changes to the Trams.ib (in older versions, Trams.gdb), which is the blank database, as this is overwritten when synchronization is first established via the Initial Sync In.*
- *All locations must install and be on the same ClientBase version **3.05** or higher, and if you are a Trams Back Office subscriber you must install Trams Back Officer version **2.9.4** or higher.*
- *Only the PRIMARY database location performs a one-time Initial Sync Out routine to create a specialized sync .tis file which thereafter allows synchronization.*
- *As part of the Initial Sync Out routine, run only by the PRIMARY database location, a special "copy" of the PRIMARY database is created which is flagged as a synchronization database.*
- *The .tis file is provided to the SYNC COPY database locations.*
- *Once the initial synchronization process is completed, on-going synchronization commences on some type of systematic routine, either daily or weekly, by use of the Sync Out and Sync In routines by the PRIMARY and SYNC COPY locations. These routines can either be performed manually (not suggested) OR automatically (preferred) by setting up a Sync Out/In Task, and by use of the Windows Task Scheduler.*

Running the Initial Sync Out & Sync In

Once you have prepared your database for synchronization, you need to perform a one-time initial Sync Out from the *PRIMARY* database and Sync In for each *BRANCH (SYNC)* location.

Initial Sync Out

ClientBase designates the *PRIMARY* database location as the location where *Trams Back Office* is being maintained. The *PRIMARY* location needs to install *ClientBase* (version **3.05** or above and TBO ***2.9.4*** or above) before commencing the synchronization process. Only the *PRIMARY* location performs a one-time *Initial Sync Out* routine which creates a specialized sync .tis (*Trams* Initial Sync) file which thereafter allows synchronization. As part of the *Initial Sync Out* routine, a "copy" of the *PRIMARY* database is created within a .tis file. This .tis file, which is used in the *Initial Sync In* process by the *SYNC COPY* database locations, is sent or carried to the *SYNC COPY* locations.

Steps for Performing Initial Sync Out

Step 1) Only the *PRIMARY* database location performs an *Initial Sync Out* (preferably on the Server)**.** To launch the *ClientBase* Synchronization Utility Wizard, go to **Start|Programs|Run** and browse for *C:\Program Files\Trams\CBPlus\cbpsync.exe* and click *OK*, or click the shortcut you created on your desktop.

Fill in the following fields:

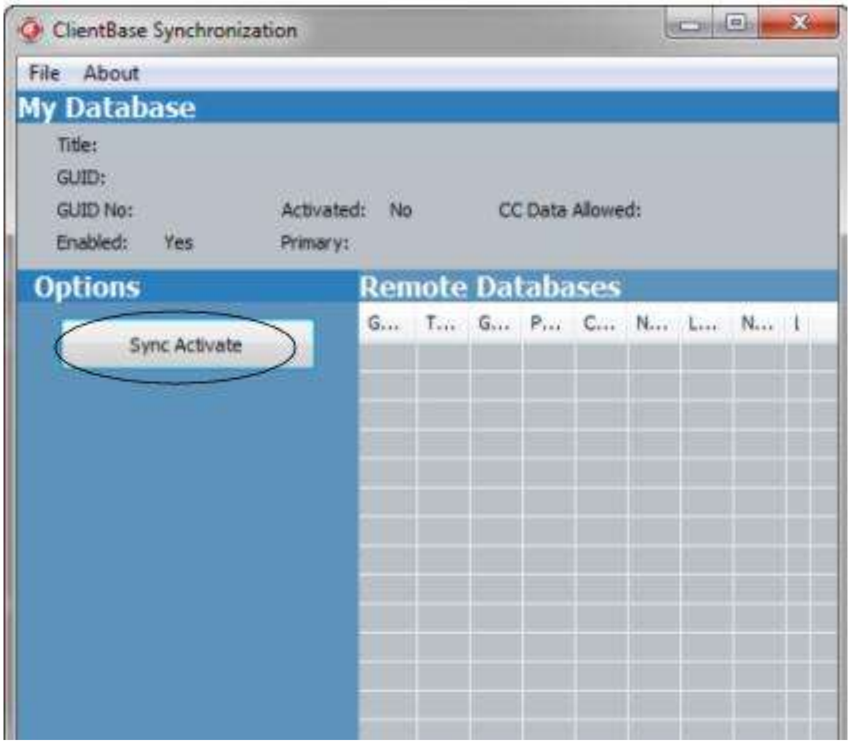
Alias: From the drop down menu, choose the *PRIMARY* location database alias.

Path: Once the *Alias* is selected, *ClientBase* automatically maps to the correct path of the database.

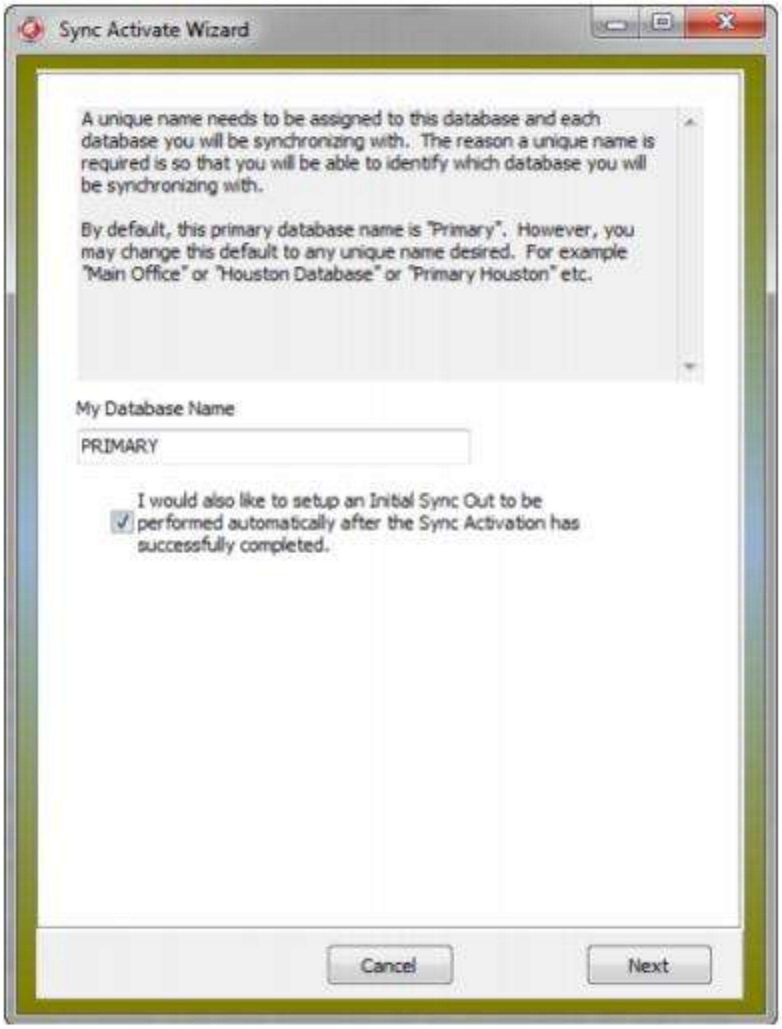
User Name: The SYSDBA is automatically chosen as the User Name.

Password: Enter the password for the SYSDBA.

Step 2) Click *Sync Activate*.



A unique database name needs to be assigned to each database that takes part in the synchronization process. The reason unique names are required is so that you are able to identify which databases you are synchronizing. Use a naming technique that quite clearly identifies each database location. For example, "Primary Database" or "Newberry Office" etc.



Assigning *My Database Name* as PRIMARY ensures a name unique to the SYNC COPY databases you are synchronizing with.

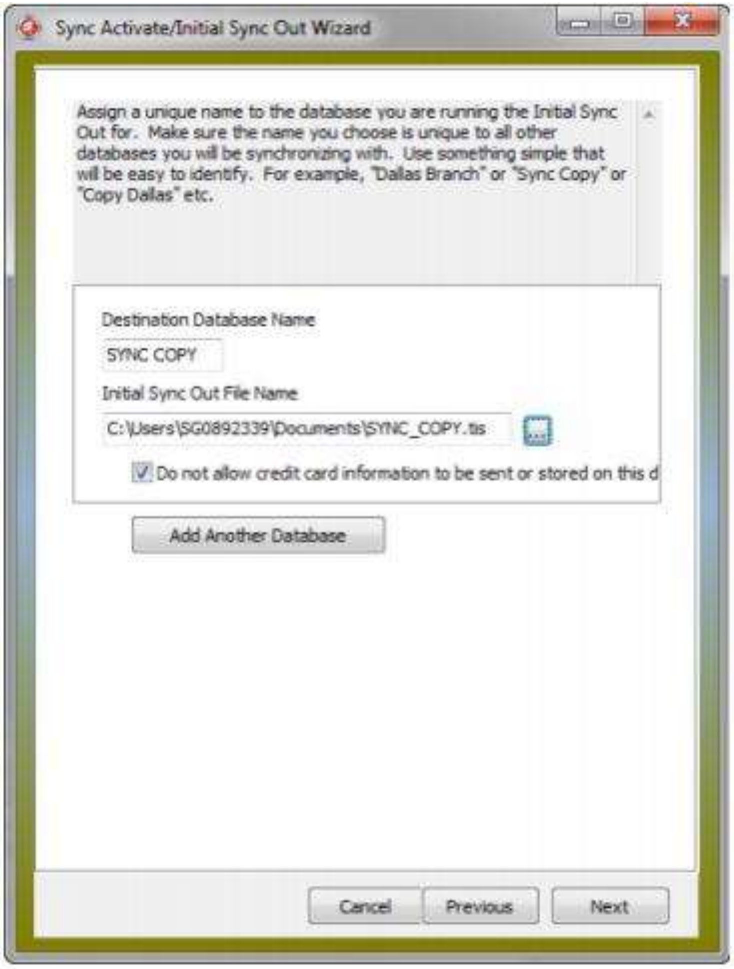
Click *Next* to continue.

Important Note: You have the choice of doing a Sync Activate and Initial Sync Out all at one time. If your database is smaller, perform the *Sync Activate* and *Initial Sync Out* at the same time by checking *I would also like to setup an Initial Sync Out to be performed automatically after the Sync Activation has success completed*, but this can ONLY be done with **users logged out of the Primary Database**. For a larger database, do not check off this option and do a Sync Activation only before or after office hours.

If you are Sync Activating your database first, a summary screen appears and the activation begins. Once enabled, a dialogue box appears, *Done.* Come back into the sync utility to set up your *Initial Sync Out,* by clicking on this menu item and following directions starting with Step 3).

If you are activating and performing an Initial Sync Out all at once, click *Next* to continue to set up your Initial Sync Out.

Step 3) Assign a unique name to the database you are running the Initial Sync Out for.



Make sure the name you choose is unique to all other databases you will be synchronizing with. Use something simple that will be easy to identify. For example, "Dallas Branch" or "Sync Copy" or "Copy Dallas" etc. Don't want credit card information to be sent? Check off ***Do not allow credit card information to be sent or stored on this database.***

If you want to put the .tis file in a different directory, choose an appropriate directory by clicking on the three dots next to the *Initial Synch Out File Name* field. By default when you type the *Destination Database Name,* the file is created and stored in **C:\Documents and Settings\Your Login\MyDocuments** if you do not identify one. Please note that the *Initial Sync Out* file contains almost your entire database (no General Ledger info), so the file it creates may be too large to e-mail. You could post the file on a Web area for download (contact *Trams* if you need help with this), or carry it to the SYNC COPY database location by means of a flash drive, zip drive, etc. Also please insure you have sufficient disk space to create the file.

Add Another Database: Proceed for each database location to fill in the *Destination Database Name,* and *Credit Card Data Allowed.* Click *Next* to continue.

Step 4) Select a Sync Out File Delivery Method.

The Synchronization Utility is about to create a file with a .tis file extension, which stands for *Trams* Initial *S*ync. Select a delivery method for this file from the drop-down menu - *Web Service and Send to File.*

Note: If you have signed up to use ***Trams*** **Web Service**, this service will be used for the ongoing sync files and is the default setting. See chapter, *Synchronize the Primary Database with a Trams Hosted Copy* for complete setup instructions.

DELIVERY METHODS:

Web Service - See chapter, Synchronize the Primary Database with a *Trams* Hosted Copy for complete setup instructions.

Save to File

If you select *Save to File,* the file will be created and be found in the path you have select for the *Destination Database Name.* Click *Next* to continue to the *Summary Screen*.

Step 5) Review your selections on a summary screen. If correct, click *Finish* for *ClientBase* to start the Initial Sync Out process. Click *Finish.*

A progress bar appears during the activation process of the Initial Sync Out to better demonstrate how far the sync process is at any given point. You can *Cancel* the Initial Sync Out processing once the sync activation process begins. A cancel button appears while the Initial Sync out takes place which can be selected if you decide the Initial Sync Out is taking longer than expected, and you would prefer doing at another time. If the process is cancelled during the exporting of the sync data, the file is not created, but the destination database should be removed from the Remote Database tab within the sync utility before starting the Initial Sync Out again.

There is an exclusive lock during the Initial Sync Out so InterBase Logins are detected and therefore minimizes the chance of someone connecting to the database during the Initial Sync Out process when they should not. Depending on the size of your database, this may take some time (approximately 1 1/2 times as along as a backup takes). You receive a message when this has been completed:

Step 7) Next, provide the new .tis file you created to the each *SYNC COPY* database location. This can be done depending on its size by carrying it to the *SYNC COPY* database location by means of a flash or .zip drive, etc. or via an online storage site.

Initial Sync In

Each SYNC COPY database location needs to install *ClientBase* and make **no changes** to the *Trams.ib (.gdb* in older installations) which is the blank database, as this is overwritten when performing *Initial Sync In*. (Best to go to **Start|Programs|*Trams*|Alias Utility** and rename the *Trams* alias to *Trams.old).* Only the SYNC COPY database locations need to perform this one-time routine.

Steps for Performing Initial Sync In

Step 1) Access the *ClientBase* Synchronization wizard and fill out *ClientBase* Login Parameters. Go to **Start|Programs|Run** and browse for C:\Program Files*Trams*\CBPlus\cbpsync.exe and click *OK*.

Fill in the following fields:

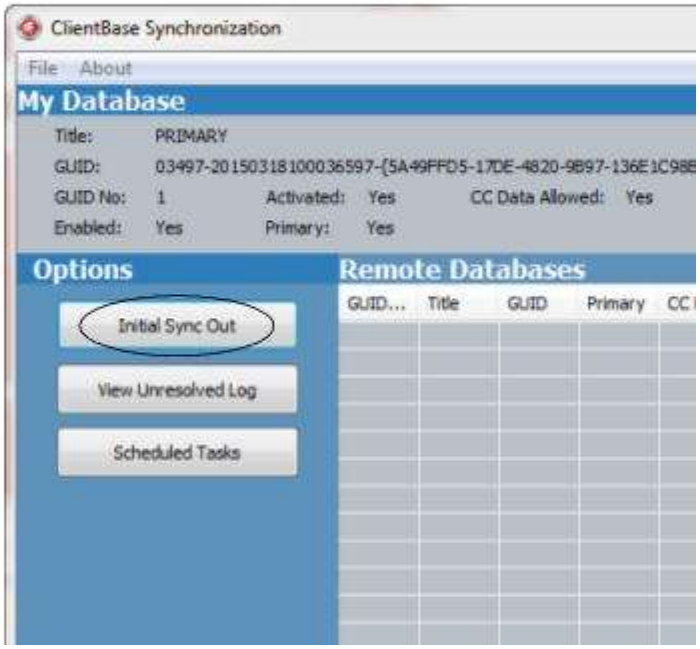
Alias: From the drop down menu, choose the *PRIMARY* location database alias.

Path: Once the *Alias* is selected, *ClientBase* automatically maps to the correct path of the database.

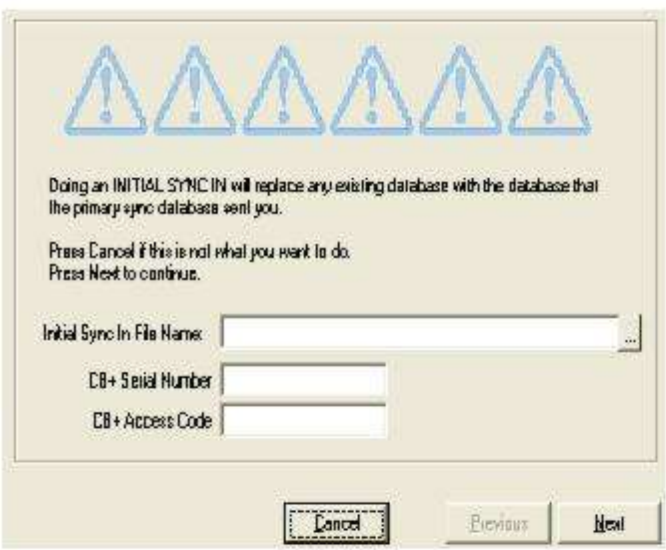
User Name: The SYSDBA is automatically chosen as the User Name.

Password: Enter the password for the SYSDBA.

Click ***Initial Sync In*** to continue.



Step 2) Browse for the Initial Sync In File (.tis) created from the PRIMARY database location and provided to you. Click on the three dots to find the file. Next enter your Branch's unique *ClientBase Serial Number* and *Access Code*. **WARNING:** You need to obtain a separate and unique Serial # and Access Code for your *Sync Copy* database, which is different from the Serial # and Access Code of your *Primary* branch. Contact your *Primary* branch to obtain these unique numbers, if you do not already have them.



Click *Next* to continue.

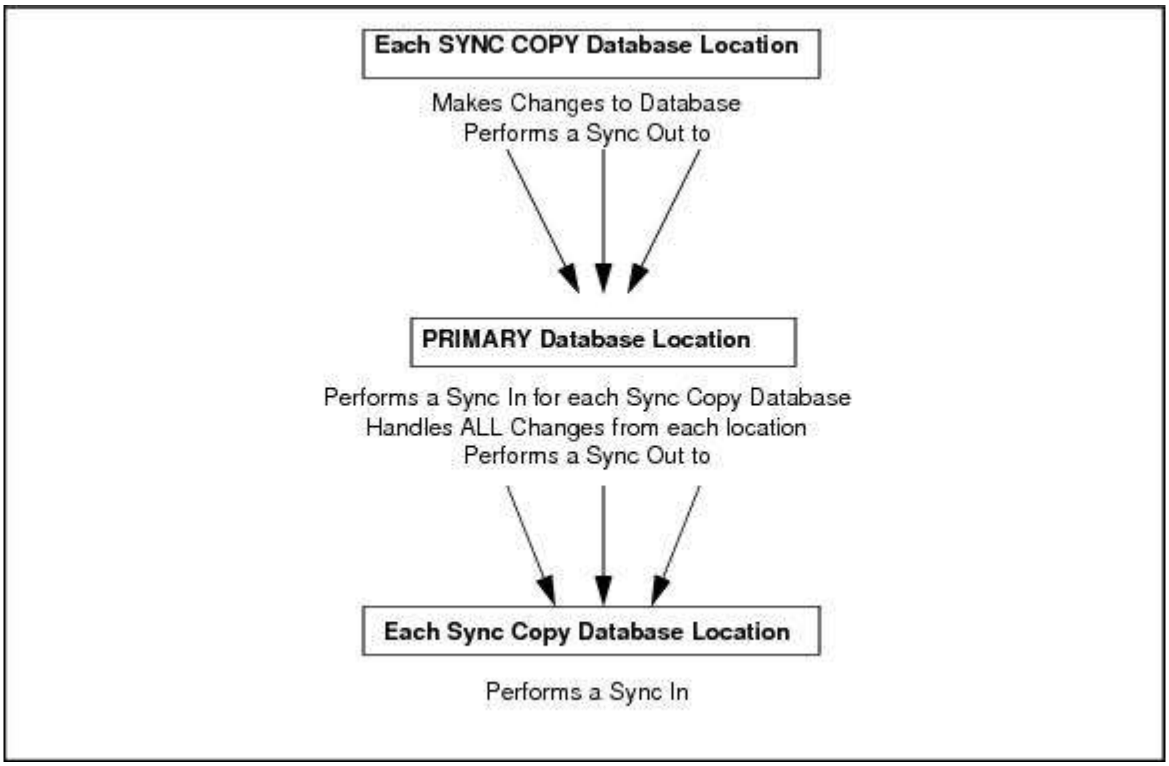
Step 3) Review your selections on a summary screen. If correct, click *Finish* for the *Initial Sync In* wizard to start automatically restoring the "copy" of the *PRIMARY* database:

Click *Finish.* A dialog box *Done* appears and now both databases contain the same data.

Creating a Routine for On-Going Sync

Once the PRIMARY database location has performed the one-time *Initial Sync Out,* and the SYNC COPY database locations have each performed the one-time *Initial Sync In*, on-going sychronization can begin. You may want to set up a systematic (daily or weekly) procedure of syncing out AND syncing in for each location. Changes made to either your primary *ClientBase* database or the sync copy need to be passed back and forth via an on-going synchronization routine. The SYNC COPY databases need to send their changes for synchronization to the PRIMARY database by performing a *Sync Out* which creates a .tsf file (*Trams* Sync File) that is used by the *Sync In* process at the PRIMARY location. Once received, the PRIMARY location *Syncs In* the .tsf files received from the SYNCH COPY databases and sends one file to each of the SYNC COPY locations. This can be done manually (**NOT SUGGESTED**) or automatically (recommended) following the instructions that follow later in this section.

Important Note: If you plan to use the *ClientBase* Res Card invoicing feature, some set up needs to be done within the PRIMARY database before beginning the on-going sync routine. A unique starting invoice number series for each Branch record needs to be created. This is because the invoice numbers issued through the *ClientBase* Res Card increment by one each time an invoice is issued, and to avoid duplicate invoice numbers, which the database does not allow, a unique series needs to be established in both the *Primary Database* and the *Sync Copy Databases*. (Invoice numbers cannot overlap the GDS and TBO invoice numbers.) Go to the **Utilities|Branch** and retrieve each Branch Record you plan to use. Within the General Branch Info tab, enter a unique *Next Sales Invoice No* and a unique *Next Refund Invoice No*. This needs to be done in both the *Primary Database* and the *Sync Copy* databases and different starting numbers should be used in each.



Steps for Performing Routine Sync Out

If you want to perform a manual (**this is not recommended**), systematic (daily or weekly) procedure of syncing out and syncing in for each location, follow these guidelines.

1) Access the *ClientBase* Synchronization Utility. From each location go to **Start|Programs|Run** and browse for C:\Program Files*Trams*\CBPlus\cbpsync.exe and click *OK*. Complete these fields:

Alias: From the drop down menu, choose the database alias.

Path: Once the *Alias* is selected, *ClientBase* automatically maps to the correct path of the database.

User Name: The SYSDBA is automatically chosen as the User Name.

Password: Input the password for the SYSDBA.

Click **Sync Out.**

The wizard defaults to the location for which you are creating the Sync Out file. If you are the PRIMARY location, it'll give you a listing of all SYNC COPY locations. (You need to do this for each of the locations after you have Sync'd In their changes.) If you are one of the SYNC COPY locations, the wizard defaults to the PRIMARY location. Click *Next* to continue.

2) Select a Sync Out Delivery Method. *ClientBase* creates a file with a .tsf extension (*Trams* Sync file). Select a delivery method for this file from the drop-down menu. If you want to put this file in a particular directory, select *Save to File* and choose an appropriate directory by clicking on the three dots next to the *Sync Out File Name* field. By default the file is created and stored in **C:\Documents and Settings\Your Login\MyDocuments** . You may also select *Web Service* as a delivery method.

Trams Products and Services offers its Web Service as a service for agencies that want to automate their Sync Out/In routines, by passing the sync files through a web utility hosted by *Trams* that manages the communication and the files between both the primary and the copy database for more seamless processing. See chapter *Synchronize the Primary Database with a Trams Hosted Copy* for complete setup details for this option.

Select also the **Sync Out Options** which include:

Start after last known exported Sync Change Log Data: This is the default and with this option, the Sync Utility starts the sync data where it left off the last time a Sync Out was performed. This should be the option you select unless you need to re-generate a sync file.

- **Start at Sync Change Log number:** Input your own start log number to re-generate a sync file.
- **Start on Sync Change Log entries made on:** Select a date from the calendar by clicking on the drop-down menu re-generate a sync file.

Click *Next* to continue.

Step 3) Review selections on the summary screen and click *Finish* to continue.

Steps for Performing Routine Sync In

After you receive the .tsf file from either the PRIMARY database location or from the SYNC COPY database locations, you need to save the file to a local drive accessible to the machine from which you run your Synchronization utility. Here is how to proceed to synchronize it with your own database.

1) Access the *ClientBase* Synchronization Utility. Go to **Start|Programs|Run** and browse for **C:\Program Files*Trams*\CBPlus\cbpsync.exe** and click *OK*, or click on the shortcut you created on your desktop. Complete the following fields:

Alias: From the drop down menu, choose your database alias.

Path: Once the *Alias* is selected, *ClientBase* automatically maps to the correct path of the database.

User Name: The SYSDBA is automatically chosen as the User Name.

Password: Input the password for the SYSDBA. Click **Sync In**.

2) Select the file and Sync In Method you want to process for synchronization. This is the .tsf (*Trams* Sync file) that was sent to you from the other database location/s. Click on the 3 dots next to the *Sync In File Name* field to locate this file. (If you choose Web Services, fill out the Web Services settings before continuing.) Click *Next* to continue.

Select the following *After Sync In Options:*

Do Nothing (default), *Delete* (*.tsf file after sync in); *Rename* .*tsf file (after sync in - enter new file extension), or *Move* (*tsf file after sync in - enter New location). Click *Next* to continue.

3) Review selections on the summary screen and click *Finish* to continue.

Creating a Scheduled Task to Automate the On-going Sync In and Sync Out

Rather than remembering to run the Sync Out and Sync In utility on a regular basis as outlined above, the *Schedule Task* feature "remembers" to run it for you, as long as the computer you have created the tasks on is running at the time the task is scheduled for. Below are the steps for creating, scheduling, and maintaining tasks for your *Sync Out*, and *Sync In* routines. **Important:** Remember, these steps need to be taken in both the primary and copy locations for both *Sync Out* and *Sync In* in order to fully automate your synchronization processing.

Creating a Task for the Sync Out Process

1) Run the cbpsync.exe and enter your Alias and SYSDBA login information.

2) Select the *Scheduled Tasks* button.

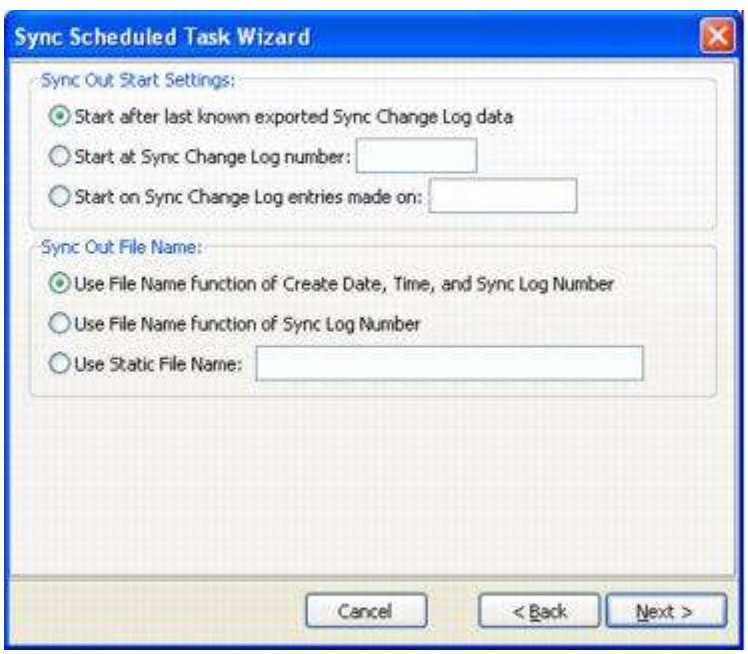
Enter the following settings necessary to run the *Sync Out* routine. By default the Task Name, Application Name and ClientBase Database is defaulted.

Operation: Click the drop-down and select *Sync Out,* Sync In, or if you are using the Sync Web Service, select *Sync In & Out via Web Service* (see chapter, *Synchronize the Primary Database with a Trams Hosted Copy* for complete setup instructions).

Sync Out File Delivery Method: Options for delivering the file include *Save to File* or *Web Service*.

Please Note: When manually running a Sync Out via our synchronization utility, upon completion of the Sync Out, the change log number displayed in the *Last Known Exported Sync Change Log Data* field is updated automatically.

Step 3) Select Sync Out Start Settings.

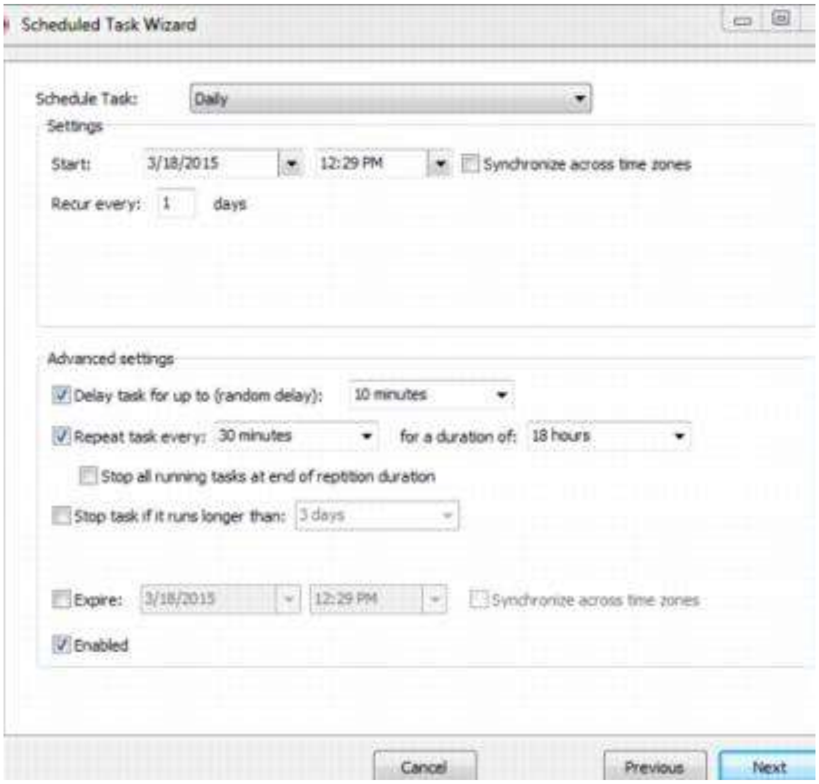


Sync Out Start Setting: Determines where the *Sync Out* routine should start the changes from. Leave this setting to the default setting of *Start after last known exported Sync Change Log Data*, which the task should normally start with. This can be overwritten with a *Log number* or *date*.

Sync Out File Name: Determines the name given to the Sync Out file. We recommend using the *Create Date, Time*, and *Sync Out Log No*. This means the file name varies each time it runs. You can also use just the *Sync Log Number*, or a static file name. If a static file name is used, then each time the Sync Out routine runs, the previous file is overwritten by the new file.

Click *Next* to continue.

Step 4) Select Time for Sync Out to Start:



These settings allows you to set a regular routine for your Sync Outs. Click *Next* to continue.

Step 5) Enter User Password Settings.

For the computer which will be doing the Sync Out, enter the User Name and Password and click *Next* to continue.

A summary of the scheduled task is displayed. For more advanced settings, click *Advanced.*

Click *Finish.*

Creating a Task for the Sync In Process

1) Run the cbpsync.exe and enter your Alias and SYSDBA login information.

2) Select *Scheduled Tasks*. (If one task has already been added, click *Add Task.)*

3) Fill in the following settings:

Operation: Click the drop-down and select *Sync In,* or if you are using the Sync Web Service, select *Sync In & Out via Web Service* (see instructions below for further steps on using the Sync Web Service and set up the Sync In & Out routine all at the same time).

Sync In File (Delivery Method):

Select Single Save to *File or Web Service (*See chapter, *Synchronize the Primary Database with a Trams Hosted Copy* for complete setup instructions).

If you have selected *File* or *Files in Directory* as the delivery method, specify by clicking on the three dots, the location of the .tsf file or directory in which the .tsf files are located. Click *Next* to continue.

Step 3) Select Sync In Options after TSF is Processed.

Do Nothing is the default. If you want to rename the file extension, delete the file after syncing, or move the file (and select a new location), check the appropriate box. Click *Next* to continue.

Step 5) Select Time for Sync In to Start:

These settings allow you to set a regular routine for your Sync Ins. Click *Next* to continue.

Step 6) Enter User Password Settings.

For the computer which will be doing the Sync In, enter the User Name and Password and click *Next* to continue.

A summary of the scheduled task is displayed. For more advanced settings, click *Advanced.* Click *Finish.*

Creating a Task for Sync In/Out via Web Service

See chapter, *Synchronize the Primary Database with a Trams Hosted Copy* for complete setup instructions.

Maintain Your Scheduled Tasks

The Task List tab of your Task Scheduler includes a listing of all scheduled sync tasks along with the *Status, the Next Run Time,* and *the Last Run Time*. Please keep in mind that although you can run the sync utility from any computer on your network, scheduled tasks are created on a particular computer. So although you only create your scheduled tasks from one computer (you do not need to run sync from every computer) the scheduled task listed on this screen will only include tasks created on this computer.

Although your sync program runs automatically once you've scheduled your tasks, you want to develop a routine to periodically view the Task List and the Last Run Time to verify your sync processing is current. If your automated sync gets interrupted, the error causing the failure is logged in your Windows Event Viewer. To view the details of the error, go to **Start|Control Panel|Administrative Tools|Event Viewer**. An entry is placed into the Event Log each time a task is run and provides an information icon that displays whether the task ran successfully or if there was an error. The Event Viewer tracks everything related to Windows, so first select *Application*, then click the column *SOURCE* to sort by application source and look for any errors where the application is *CBPSYNC*. Double-click the error to view the description and details of the error. Contact our support desk for assistance on how to rectify the error.

Recommended Routine for Verifying Your Sync Tasks are Running Successfully

1) In all locations, use *ClientBase* to create a Reminder with an Alarm to remind you Daily, Weekly or Monthly (depending on how frequent your sync tasks are scheduled) to verify the Sync Out and Sync In routines are current.

2) Use one of the following to view the last sync dates:

From within *ClientBase*, go to Help/About and view the Last Sync In and Last Sync Out dates. Verify they are current based on your task scheduler frequency.

From the CBPSync.exe, go to the Schedule Task feature and from the View Task list verify the Last Run Time is current based on your task scheduler frequency.

3) Use the Windows Event View to locate specifics on any errors if the Sync In or Sync Out routines become out-of-date.

Handling Issues Sent to the SyncInfo Log

After synchronization has occurred, any data that could not be updated is put in a *ClientBase Sync Unresolved Log* file. Each time synchronization occurs, data contained in this log is reprocessed. Select *View Unresolved Log.* To access this log to print out, access the *ClientBase* Synchronization Utility by going to **Start|Programs|Run** and browse for C:\Program Files*Trams*\CBPlus\cbpsync.exe and click *OK*. **Note:** A quick way to see if items are contained on the Unresolved Log is to click **Help|About|Sync Tab** in *ClientBase*. This will tell you if you have any unresolved items.

Select *View Unresolved Log.*

Warning: The first time you see anything on this log, please make sure to email **Trams.sync@sabre.com** to get guidance on how to clean up your log. Someone will call you and lead you through the process of cleaning up your log.

Summarize: Summarizes the highlighted record the synchronization utility has not been able to process.

Summarize All: Summarizes all records the synchronization utility has not been able to process.

Clean Up: First tries to process any unresolved records and then prompts you for the option of deleting those unresolved records.

Process Unresolveds: Attempts to process any records that previously synchronization was not able to process.

Examples of how certain data can end up in the "unresolved log" include:

- Trying to *Sync In* profile changes while the profile is actively open and being updated within the database you are syncing into. (The sync utility can be run while users are working in the database.) You can either go to the Unresolved Log and select *Process Unresolveds* to reprocess that profile’s changes, or you can wait until your next *Sync In*, as each time you *Sync In*, the system automatically tries to process any lingering unresolved items.

- Someone deletes a profile in one database, and before synchronizing, someone adds an Invoice, Activity or Res Card to that same profile in the other database. The *Sync In* routine at both locations results in unresolved records as the database that has the profile deleted cannot now add the Activity, Res Card or Invoice, and the database that has the new Invoice, Activity or Res Card cannot delete the profile because one of these records now exists. In this scenario you need to completely re-enter the profile and new Activity, Res Card or Invoice as a new profile, so it can now sync over to the database in which it was deleted, and you need to manually delete the old profile and Activity, Res Card or Invoice so there is not a duplicate. These items do not get resolved automatically, so you can use the *Clean Up* feature to delete them out of unresolved.

- A duplicate Invoice # is issued by either location. As discussed in the section *Steps for Preparing Your Primary Database for Synchronization*, it is very important that a Branch is setup for each location and that each location assigns this unique Branch number to EVERY Res Card created and invoiced by that location. Otherwise, the "next invoice number" default will be the same in each location and result in a duplicate Invoice number, which the database does not allow. If this happens, upon synchronizing the file in, the invoice with the duplicate invoice # will not get processed and go to the Unresolved log. The only way of addressing this is to change the duplicate invoice number within the Primary Database using *Trams Back Office*. You can then either go to the Unresolved Log and select "Process Unresolves" to reprocess the Invoice, now that there is no duplicate number, or you can wait until your next *Sync In*, as each time you *Sync In* the system automatically tries to process any lingering unresolved items.

Note: The Sync process includes the purging of old records in the syncchangelog. By default, the scheduled task Sync process now automatically purges 100,000 of the oldest completely processed SYNCCHANGELOG records that are older than 90 days. If you would like to change either of the defaults, modify the CBPSYNC command line parameters with new values: PURGEDAYS: 90 PURGESIZE: 100000

For example, if you wanted to change the number of days from 90 to 60, modify the command line parameter to read: "C:\Program Files*Trams*\CBplus\CBPSync.exe" PURGEDAYS:60 PURGESIZE:100000.

Synchronization Frequently Asked Questions

What Can Be Done in Primary DB I Can’t Do in the Sync Copies?

There are certain settings and routines that must be done from the Primary database and have been disabled within the sync copies for data integrity purposes. Below is a complete listing of what you can ***only do from the Primary database***:

Update all Global Default Settings

Update all Branch Settings in the Utilities Menu (except Invoice/Refund #’s, these must sync out in the sync copy.)

Use the ASCII Import or XML Import Utility

Log into Trams Back Office

Note: The only thing a sync'd copy can do in the database is create User Logins, Change Branch Info including Invoice/Refund #'s (but not formats), and Enter Access Codes.

What If I Change Same Profile in Each DB Between Synchronizations?

Adding new profiles, activities and Res Cards to each database between synchronizations of course results in the combination of all new records in both databases after synchronization. Adding new records to the same profile (new Communication entries, Family/Contact entries, Cards, Activities, Res Cards etc.) in each database between synchronizations also results in the combination of all new records in that single profile in both databases after synchronization.

But, what if the same record within an existing profile (same Communication entry, Family/Contact entry, Card, Activity, Res Card etc.) is updated in each database between synchronization?

Updating the same existing record within the same profile (the same phone entry, or card entry, or traveler entry or Activity, etc.) in each database between synchronizations results in only the update that occurred latest in time after the synchronization is performed. For example, if the traveler record for Christine Anderson is updated with a *Courtesy Title* at 9:00 a.m. in the primary database, and the same traveler record for Christine Anderson is updated with a *Gender* at 10:00 a.m. in the sync copy database and synchronization takes place at 11:00 a.m., the result includes a *Gender* but no *Courtesy Title* in Christine Anderson's family record.

A record is defined as any screen that includes an *OK*, *Cancel* or *Apply* button and all the fields included in that screen. To avoid the possible loss of data, we recommend you limit each location to only *viewing* and *adding* records to profiles that are not assigned to its branch. Avoid ***updating*** records that are part of a profile that is not assigned to your branch. We also recommend synchronizing databases on a frequent, regular schedule. Synchronizing databases on a frequent basis (daily) also minimizes the chances of updating the same record between synchronizations and possibly losing data.

What Happens If I Delete Record in One DB and Before Synchronizing, Change the Record in Other Database?

Deletions win. Regardless of the time stamp on the modifications, once both databases are synchronized the record is deleted. The exception would be in the case of modifying a profile by adding an invoice and then deleting the profile from the other database between synchronizations.

What Does NOT Synchronize?

Workstation Defaults and certain *Trams Back Office* data including Journal Entries and all General Ledger information other than the End of Period "To Date" do NOT synchronize.

Do Invoices Generated from Res Card in Sync Copy DB Synchronize to the Primary DB?

Yes and visa versa. If you plan to use the *ClientBase* Res Card invoicing feature, some setup needs to be done within each database before beginning the on-going sync routine. Each database needs to create a unique starting Invoice number series for each Branch record. This is because the invoice numbers issued through the *ClientBase* Res Card increment by one each time an invoice is issued and to avoid duplicate invoice numbers (which go to unresolved and do not get processed by the synchronization routine), a unique series needs to be established in both the *Primary Database* and the *Sync Copy Database*. This can be done by going to the Utilities menu, selecting the Branch menu and retrieving each Branch Record you plan to use. Within the General Branch Info tab, enter a unique *Next Sales Invoice No* and a unique *Next Refund Invoice No*. This needs to be done in both the *Primary Database* and the *Sync Copy* database and different starting numbers should be used in each.

What If I Do End of Period in Primary DB, and Before I Sync Out to Branch DB, Someone in Branch Generates Invoice from the Res Card Within Same Closed Period?

The branch database knows the last *End of Period Through* date and does not allow Users to issue invoices within that time frame. In this case though, since the End of Period date has not yet synchronized to the branch, the Res Card allows the User to generate the invoice. After synchronizing that file out of the branch and upon synchronizing the file into the main office, the synchronization program detects the invoice within the closed period and stops the synchronization process; therefore, not allowing that sync file to be synchronized until the End of Period is voided in the Primary database. Since the branch database does not have a way of voiding the invoice, even if that is the desired result, you need to void the End of Period in the Primary database, so that you can Sync In the branch sync file. After syncing in the file, you can then void the Invoice using the Primary database, or reissue your End of Period if the invoice belongs.

Can I Log into TBO From Any DB Other Than Primary DB?

As mentioned above, no. You can only connect to the *Primary Database* using the *Trams Back Office* program, as synchronization was designed for *ClientBase* not *Trams Back Office*.

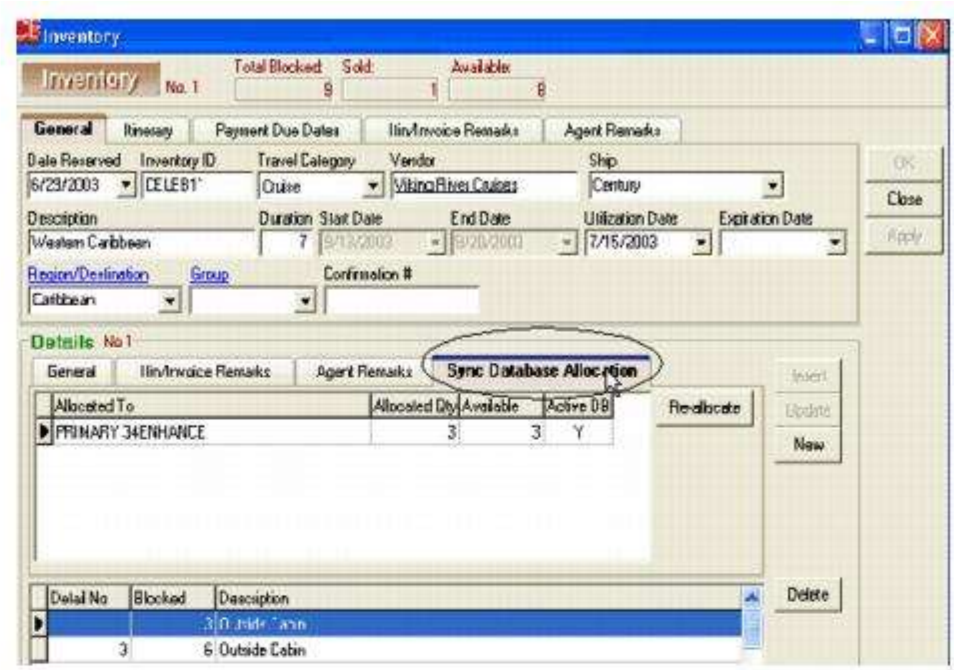
Important Note: Although you cannot log into your Sync Copy Database with the *Trams Back Office* program (*Trams*win.exe), if your agency uses *Trams Back Office* you do need to keep your Sync Copy database upgraded to the same version your Primary database is running. Therefore, anytime you install a *Trams Back Office* update in your Primary location, you will need to run the update in your Sync Copy location as well.

Can I Regenerate Sync File that I've Already Created?

Yes, the synchronization utility defaults to starting the synchronization after the last known exported Sync Change Log data, but you can change this default and start your synchronization file using a Change Log number or a Change Log date.

How Do I Allocate Inventory Across Sync Primary/Sync Copy DBs

In the past, agencies that have been synchronizing with another location were limited to creating and pulling from inventory in only the Primary location. The reason for this limitation was because of the potential to oversell inventory between synchronization processes. To overcome this danger, *ClientBase* has the ability to allocate available inventory across your various sync databases. Sync activated databases have an additional entry tab in *Inventory Details*, called *Sync Database Allocation.*:



Upon creating new Inventory (or updating existing Inventory) look at the count within the *Available Inventory* field. Determine if this inventory should be re-allocated to other sync locations (databases) to facilitate better sales of this inventory. Click the *Sync Database Allocation* tab and *Re-allocate* to re-allocate any quantity available from your current database to any other Sync Copy database.

The system allocates the inventory to the database the user is connected to. When an agent *Pulls From Inventory,* they are only able to pull inventory allocated to the database they are connected to. As agents use the inventory feature within the Res Card, if they determine that they have a client interested in inventory that is no longer available, they click the *View Inventory Record* and the *Sync Database Allocation* tab to see if there is available inventory in other locations (databases). If so they may suggest re-allocated some of that available inventory to locations (databases) that no longer have any available to them. To re-allocate inventory from one location (database) to another, you must connect to the database that has the available inventory. You can only re-allocate inventory from the database you are connecting to and you can only re-allocate inventory of the database has available inventory records to re-allocate.

*****Important Note for agencies syncing to CBB Hosted:** If you are synchronizing to the Hosted *ClientBase* Browser application, **DO NOT** allocate inventory to that database unless you are OK with not being able re-allocate it back out of CBB Hosted!

ClientBase Browser does not yet include the Inventory Manager and therefore does not have the ability to re-allocate its unused available inventory back to other databases. This means any inventory allocated to CBB Hosted, will have to be sold via CBB Hosted, or the agency would have to connect to the CBB Hosted database via *ClientBase Windows* application in order to re-allocate it back to other databases.

Chapter 24: Synchronize Primary Database with Trams Hosted Copy

This section provides an overview on setting up a copy of the primary location's database on Trams Hosted Server, and establishing automatic, on-going synchronization of updates by use of the Windows Task Scheduler.

What Is *ClientBase* Synchronization?

The *ClientBase* Synchronization utility provides you with the ability to create a copy of your *ClientBase* database and place it on a *Trams* Hosted Server so it can be accessed for either CBMS (*ClientBase* Marketing Services) purposes, or Hosted *ClientBase* Browser (CBB) purposes. Changes made to either your primary *ClientBase* database or the sync copy are then passed back and forth via an on-going synchronization routine.

What is *Trams* Sync Web Service?

The *Trams* Sync Web Service acts as an intelligent automatic "Post Office" where a copy of your database file is stored or "hosted". After a relatively easy initial "Sync Out" setup of your primary database with timed scheduling, the *Trams* Web Service actually picks up or delivers any updates to your database automatically. After you have signed up to use this service and obtain a User Name and Password, a *Trams* support representative guides you through the initial setup and scheduled routines as outlined below. Please see chapter, *Synchronize the Primary Database with a Trams Hosted Copy.*

How It Works

Your entire PRIMARY database and all the information connected to Profiles, Activities, Res Cards and Invoices can be "Sync'd" out to the *Trams* Sync Web Service where it is hosted by use of a one-time *Initial Sync Out* using the *ClientBase* sync utility. An ongoing "sync" routine is then created that automatically updates both the primary and copy database with any changes users have made to them. In this section we cover the steps you need to set up and maintain synchronization:

1) Preparing Your Primary Database for Synchronization

2) Schedule an Appointment for One-Time Setup Process

3) Summary of Synchronization Process

4) Running the Initial Sync Out and Creating a Scheduled Task to Automate the On-going Sync Out/Sync In

Prepare Your Primary Database for Synchronization

The Primary database is where the synchronization process begins and is used to create the copy for hosting on the *Trams* Sync Web Service. Please take the following steps in your Primary database **BEFORE** you begin the Initial Synchronization process:

If you currently have more than one database because of remote access challenges, you must consolidate those databases into one Primary database (the one used by *Trams Back Office* if you use that program) in order to establish the synchronization process. Please contact our *Trams* support desk for assistance with this, as they can review the tools we have that can assist you with this, including our ASCII Export/Import.

If you are new to *ClientBase*, you must first install the *ClientBase* program in your Primary location.

Perform a backup of your primary database prior to running your Initial Sync Out. Archive this backup in case it is ever needed in the future. Verify if your database is encrypted by going to **Help|About.** If you want an encrypted database, you will need to encrypt before the initial sync out. Implementation can assist you with this.

Schedule an Appointment for One-Time Setup Process

Once you have completed the steps above and prepared for synchronization, email the following details so that we can schedule an appointment to walk you through the one-time setup process. All details below must be provided to

Trams.Implementation@sabre.com in order to begin a setup appointment. An Implementation Specialist should be calling you too.

Agency Name:

Agency City, State:

Agency Contact:

Phone:

Email:

***ClientBase* Version:**

***Trams Back Office* Version:**

***ClientBase* Serial #:**

Windows Login and Password for the designated Sync Out computer:

Date of Last Backup:

Summary of Synchronization Process

ClientBase designates the PRIMARY database location as the location where Trams Back Office is being maintained.

The PRIMARY database location needs to install ClientBase and set up the database to reflect the profiles, branch info, user logins and defaults that they would like to start each location off with.

The PRIMARY database location performs a one-time Initial Sync Out routine to create a specialized sync .tis file which thereafter allows synchronization on the Trams Sync Web Service.

As part of the Initial Sync Out routine, run only by the PRIMARY database location, a special "copy" of the PRIMARY database is created which is flagged as a synchronization database.

Once the initial synchronization process is completed, on-going synchronization commences on some type of systematic routine, either daily or weekly (in the case of Hosted CBB, every 30 minutes), by use of the Sync Out and Sync In routines by the PRIMARY and Web Service locations.

Run Initial Sync Out & Create Scheduled Task to Automate On-going Sync Out/In

Steps for Performing Initial Sync Out

Step 1) Only the *PRIMARY* database location performs an *Initial Sync Out* (preferably on the Server)**.** To launch the *ClientBase* Synchronization Utility Wizard, go to **Start|Programs|Run** and browse for *C:\Program*

Files\Trams\CBPlus\cbpsync.exe and click *OK*, or click the shortcut you created on your desktop.

Fill in the following fields:

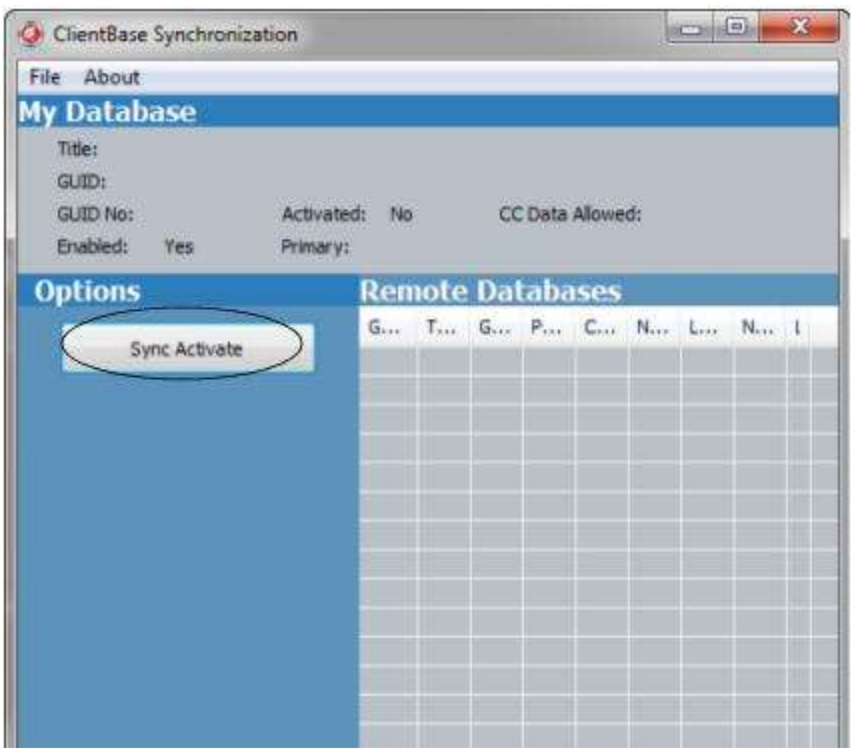
Alias: From the drop down menu, choose the *PRIMARY* location database alias.

Path: Once the *Alias* is selected, *ClientBase* automatically maps to the correct path of the database.

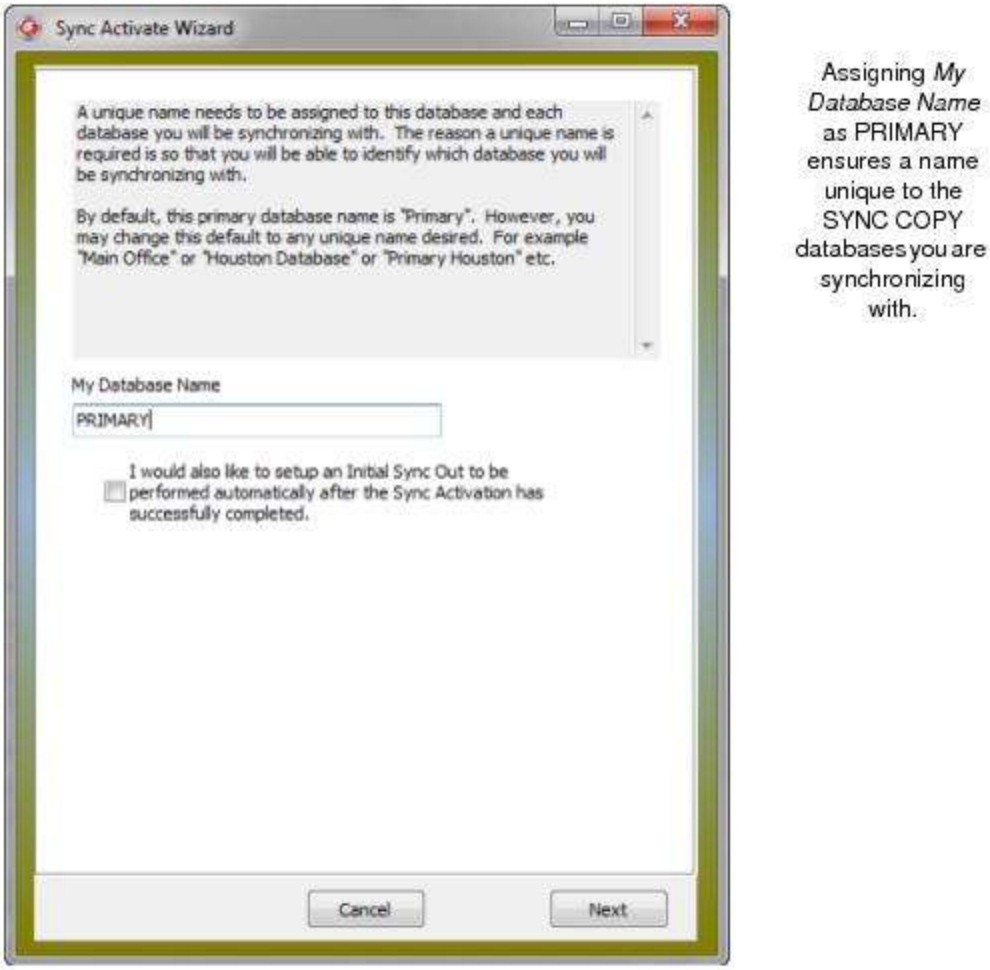
User Name: The SYSDBA is automatically chosen as the User Name.

Password: Enter the password for the SYSDBA.

Step 2) Click *Sync Activate*.



A unique database name needs to be assigned to each database that takes part in the synchronization process. The reason unique names are required is so that you are able to identify which databases you are synchronizing. Use a naming technique that quite clearly identifies each database location. For example, "Primary Database" or "Newberry Office" etc.



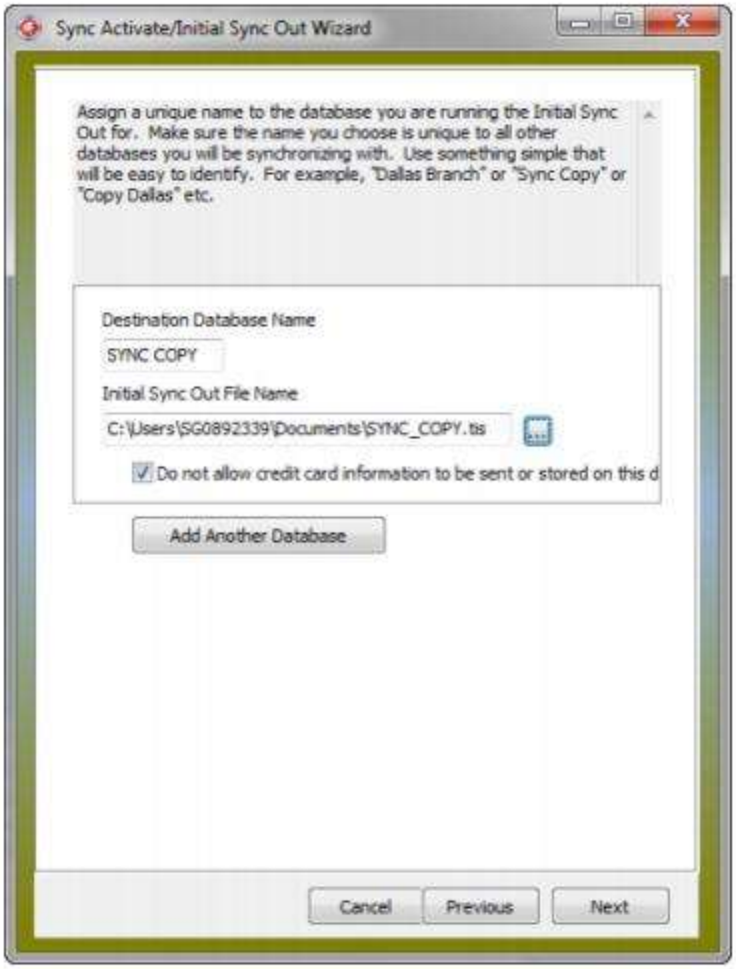
Click *Next* to continue.

Important Note: You have the choice of doing a Sync Activate and Initial Sync Out all at one time. If your database is smaller, perform the *Sync Activate* and *Initial Sync Out* at the same time by checking *I would also like to setup an Initial Sync Out to be performed automatically after the Sync Activation has been successfully completed*, but this can ONLY be done with **users logged out of the Primary Database**. For a larger database, do not check off this option and do a Sync Activation only before or after office hours.

If you are Sync Activating your database first, a summary screen appears and the activation begins. Once enabled, a dialogue box appears, *Done.* Come back into the sync utility to set up your *Initial Sync Out,* by clicking on this menu item and following directions starting with Step 3).

If you are activating and performing an Initial Sync Out all at once, click *Next* to continue to set up your Initial Sync Out.

Step 2) Assign a unique name to the database you are running the Initial Sync Out for.



Make sure the name you choose is unique to all other databases you will be synchronizing with. Use something simple that will be easy to identify. For example, "Dallas Branch" or "Sync Copy" or "Copy Dallas" etc. Don’t want credit card information to be sent? Check off ***Do not allow credit card information to be sent or stored on this database.***

Step 4) Select a Sync Out File Delivery Method.

The Synchronization Utility is about to create a file with a .tis file extension, which stands for *Trams* Initial *S*ync. Select the delivery method *Web Service* for this file from the drop-down menu. This service will be used for the ongoing sync files.

If you want to put the .tis file in a different directory, choose an appropriate directory by clicking on the three dots next to the *Initial Synch Out File Name* field. By default when you type the *Destination Database Name,* the file is created and stored in **C:\Documents and Settings\Your Login\MyDocuments** if you do not identify one. Please note that the *Initial Sync Out* file contains almost your entire database (no General Ledger info), so the file it creates may be large, so verify that you have sufficient disk space to create it.

Web Service

If you have signed up to use ***Trams* Web Service** with *Trams*, this service will be used for the ongoing sync files. This is also the area to use for Proxy server settings:

Sync Out File Delivery: Choose Web Service from drop-down.

User Name/Password: This is a *Trams* user name/password supplied by *Trams* implementer.

Connection requires use of a Proxy: Check here if your agency is using a proxy server.

Host/Port/User Name/Password: These are proxy server settings.

For modification of any of these settings, click *Advanced Settings* (there is usually no need to go into this area unless *Trams* makes some change to our defaults.)

Click *Next* to continue to the *Summary Screen.*

Step 5) Review your selections on a summary screen. If correct, click *Finish* for *ClientBase* to start the Initial Sync Out process. Click *Finish.*

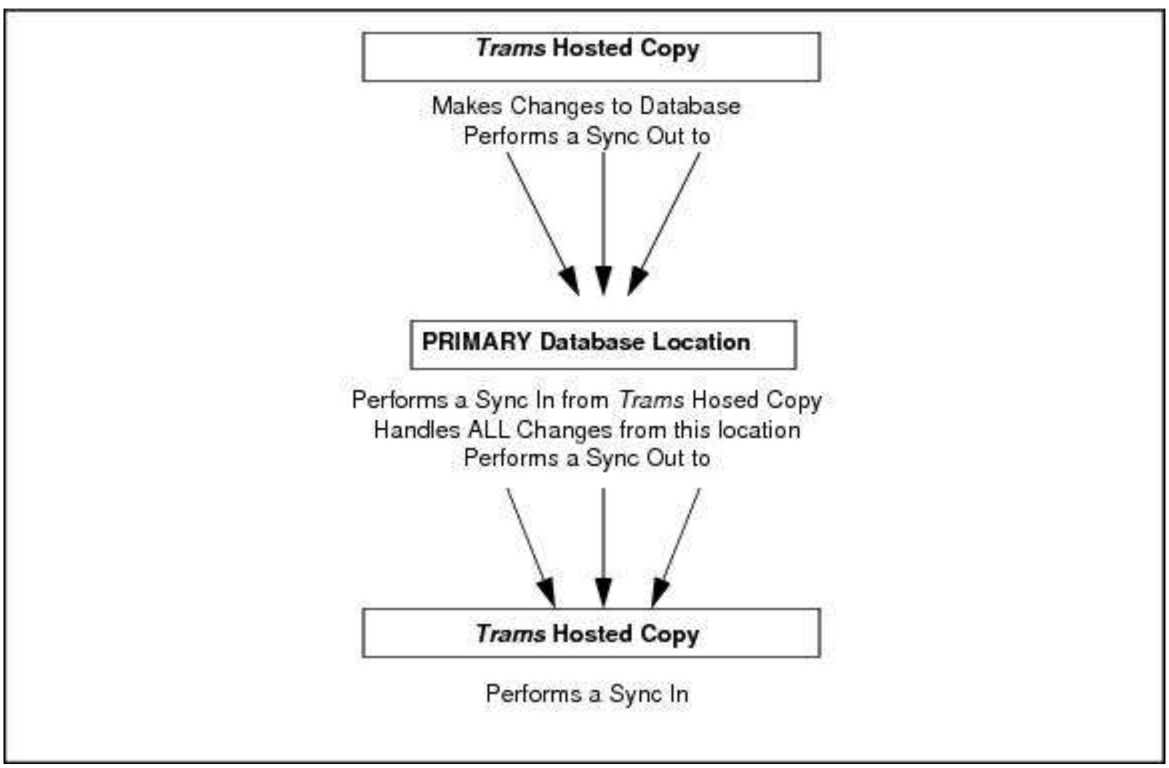
A progress bar appears during the activation process of the Initial Sync Out to better demonstrate how far the sync process is at any given point. You can *Cancel* the Initial Sync Out processing once the sync activation process begins. A cancel button appears while the Initial Sync out takes place which can be selected if you decide the Initial Sync Out is taking longer than expected, and you would prefer doing at another time. If the process is cancelled during the exporting of the sync data, the file is not created, but the Destination database should be removed from the Remote Database tab within the sync utility before starting the Initial Sync Out again.

There is an exclusive lock during the Initial Sync Out so InterBase Logins are detected and therefore minimizes the chance of someone connecting to the database during the Initial Sync Out process when they should not. Depending on the size of your database, this may take some time (approximately 1 1/2 times as along as a backup takes). You receive a message when this has been completed.

Step 6) Next, provide the new .tis file you created to each *SYNC COPY* database location. This can be done depending on its size by email, posting it on a Web area for download, or carrying it to the *SYNC COPY* database location by means of a flash or .zip drive, etc.

Create an Automatic Routine for On-Going Sync

Once the PRIMARY database location has performed the one-time *Initial Sync Out,* and the SYNC COPY database locations have each performed the one-time *Initial Sync In*, on-going synchronization can begin. Changes made to either your primary *ClientBase* database or the sync copy need to be passed back and forth via an on-going synchronization routine. The *Trams* Hosted Copy needs to send its changes for synchronization to the PRIMARY database by performing a Sync Out which creates a .tsf file (*Trams* Sync File) that is used by the Sync In process at the PRIMARY location. Once received, the PRIMARY location Syncs In the .tsf file received from the *Trams* Hosted Copy and sends one file to each of the SYNC COPY locations. This Sync Out and Sync In routine can be set up automatically by using the Windows Task Scheduler.



Important Note: If you plan to use the *ClientBase* Res Card invoicing feature, some set up needs to be done within the *Trams* Hosted database before beginning the on-going sync routine. A unique starting invoice number series for each Branch record needs to be created. This is because the invoice numbers issued through the *ClientBase* Res Card increment by one each time an invoice is issued, and to avoid duplicate invoice numbers, which the database does not allow, a unique series needs to be established in both the *Primary Database* and the *Sync Copy Databases*. This can be done by going to the **Utilities|Branch** and retrieving each Branch Record you plan to use. Within the General Branch Info tab, enter a unique *Next Sales Invoice No* and a unique *Next Refund Invoice No*. This needs to be established in both the *Primary Database* and the *Trams* Hosted Databases. It is important that the starting number sequence will not cross over your GDS, *Trams Back Office* or your *ClientBase Windows* version invoice sequence numbers, and different starting numbers should be used in each branch.

Steps for Performing Automatic Routine for Sync Out/Sync In

Our suggestion is to set up the automatic Sync Out/Sync In routine **immediately after** doing the Initial Sync Out at the Primary Location. To perform a systematic procedure of syncing out and syncing in for each location, follow these guidelines.

1) Access the *ClientBase* Synchronization Utility. Go to **Start|Programs|Run** and browse for C:\Program Files*Trams*\CBPlus\cbpsync.exe and click *OK*, or click the shortcut if you created one on your desktop. Complete these fields:

Alias: From the drop down menu, choose the database alias.

Path: Once the *Alias* is selected, *ClientBase* automatically maps to the correct path of the database.

User Name: The SYSDBA is automatically chosen as the User Name.

Password: Input the password for the SYSDBA.

2) Click *Scheduled Tasks* to set up the ongoing Sync Out/In file.

The wizard defaults to the location for which you are creating the Sync Out/In file. If you are the PRIMARY location, it'll give you a listing of all SYNC COPY locations.

Fill in the following fields:

Operation: Select *Sync In & Out via Web Service.*

Method: Select *Web Service.*

To GUID: Select *All GUIDS* (or PRIMARY for a branch location).

Click *Next* to continue.

3) Input Web Service Data for the ongoing Sync Out/In file. *ClientBase* creates a file/s with a .tsf extension (*Trams* Sync file).

User Name/Password: This is a *Trams* user name/password supplied by *Trams* implementation.

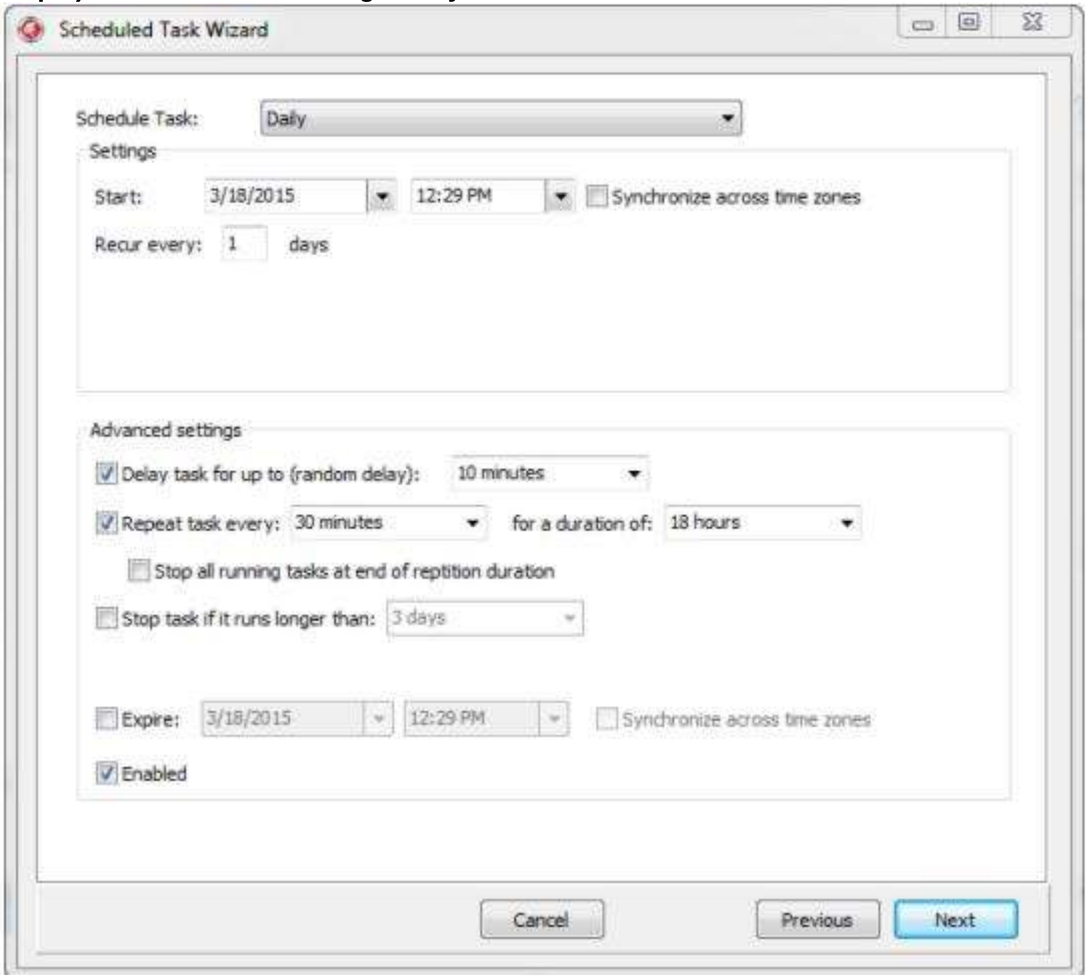
Connection requires use of a Proxy: Check here if your agency is using a proxy server.

Host/Port/User Name/Password: These are proxy server settings.

For modification of any of these settings, click *Advanced Settings* (there is usually no need to go into this area unless *Trams* makes some change to our defaults.)

Click *Next* to continue.

Step 4) Make selections using the Sync Scheduled Task Wizard.



When setting up a task for *Sync In/Out Via Web Service,* the Task Scheduler settings appear with many of the fields defaulted. Select the *Start Time/Perform this task setting/and Start date* and click *Next* to continue. Your computer user name should be defaulted. Enter a password for this user and confirm. Click *Next* to continue.

Advanced: Click *Advanced* to set up additional properties for your task.

Please Note: The computer at which you are setting up the scheduled task is the computer from which the task will be run, and must be on at the designated time in order to run.

Step 7) Review your selections on a summary screen. If correct, click *Close* or click *Add/Modify/or Delete* to edit.

Handling Issues Sent to the SyncInfo Log

After synchronization has occurred, any data that could not be updated is put in a *ClientBase Sync Unresolved Log* file. Each time synchronization occurs, data contained in this log is reprocessed. Select *View Unresolved Log.* To access this log to print out, access the *ClientBase* Synchronization Utility by going to **Start|Programs|Run** and browse for C:\Program Files*Trams*\CBPlus\cbpsync.exe and click *OK*.

Note: A quick way to see if items are contained on the Unresolved Log is to click **Help|About|Sync Tab** in *ClientBase*. This will tell you if you have any unresolved items.

Select *View Unresolved Log.*

Warning: The first time you see anything on this log, please make sure to email **Trams.Sync@*sabre*.com** to get guidance on how to clean up your log. Someone will call you and lead you through the process of cleaning up your log.

Summarize: Summarizes the highlighted record the synchronization utility has not been able to process.

Summarize All: Summarizes all records the synchronization utility has not been able to process.

Clean Up: First tries to process any unresolved records and then prompts you for the option of deleting those unresolved records.

Process Unresolveds: Attempts to process any records that previously synchronization was not able to process.

Examples of how certain data can end up in the "unresolved log" include:

- Trying to *Sync In* profile changes while the profile is actively open and being updated within the database you are syncing into. (The sync utility can be run while users are working in the database.) You can either go to the Unresolved Log and select *Process Unresolves* to reprocess that profile's changes, or you can wait until your next *Sync In*, as each time you *Sync In*, the system automatically tries to process any lingering unresolved items.

- Someone deletes a profile in one database, and before synchronizing, someone adds an Invoice, Activity or Res Card to that same profile in the other database. The *Sync In* routine at both locations results in unresolved records as the database that has the profile deleted cannot now add the Activity, Res Card or Invoice, and the database that has the new Invoice, Activity or Res Card cannot delete the profile because one of these records now exists. In this scenario you need to completely re-enter the profile and new Activity, Res Card or Invoice as a new profile, so it can now sync over to the database in which it was deleted, and you need to manually delete the old profile and Activity, Res Card or Invoice so there is not a duplicate. These items do not get resolved automatically, so you can use the *Clean Up* feature to delete them out of unresolved.

- A duplicate Invoice # is issued by either location. As discussed in the section *Steps for Preparing Your Primary Database for Synchronization*, it is very important that a Branch is setup for each location and that each location assigns this unique Branch number to EVERY Res Card created and invoiced by that location. Otherwise, the "next invoice number" default will be the same in each location and result in a duplicate Invoice number, which the database does not allow. If this happens, upon synchronizing the file in, the invoice with the duplicate invoice # will not get processed and go to the Unresolved log. The only way of addressing this is to change the duplicate invoice number within the Primary Database using *Trams Back Office*. You can then either go to the Unresolved Log and select "Process Unresolves" to reprocess the Invoice, now that there is no duplicate number, or you can wait until your next *Sync In*, as each time you *Sync In* the system automatically tries to process any lingering unresolved items.

Note: The Sync process includes the purging of old records in the syncchangelog. By default, the scheduled task Sync process now automatically purges 100,000 of the oldest completely processed SYNCCHANGELOG records that are older than 90 days. If you would like to change either of the defaults, modify the CBPSYNC command line parameters with new values: PURGEDAYS: 90 PURGESIZE: 100000

For example, if you wanted to change the number of days from 90 to 60, modify the command line parameter to read: "C:\Program Files*Trams*\CBplus\CBPSync.exe" PURGEDAYS:60 PURGESIZE:100000.

Synchronization Frequently Asked Questions

What Can I Do in Primary DB That I Can't Do in Sync Copies?

There are certain settings and routines that must be done from the Primary database and have been disabled within the sync copies for data integrity purposes. Below is a complete listing of what you can ***only do from the Primary database***:

Update all Global Default Settings

Update all Branch Settings in the Utilities Menu (except Invoice/Refund #'s, these must sync out in the sync copy)

Use the ASCII Import or XML Import Utility

Log into Trams Back Office

Note: The only thing a sync'd copy can do in their database is create User Logins, Change Branch Info including Invoice/Refund #'s (but not formats), and Enter Access Codes.

What If I Change Same Profile in Each DB Between Synchronizations?

Adding new profiles, activities and Res Cards to each database between synchronizations of course results in the combination of all new records in both databases after synchronization. Adding new records to the same profile (new Communication entries, Family/Contact entries, Cards, Activities, Res Cards etc.) in each database between synchronizations also results in the combination of all new records in that single profile in both databases after synchronization.

But, what if the same record within an existing profile (same Communication entry, Family/Contact entry, Card, Activity, Res Card etc.) is updated in each database between synchronization?

Updating the same existing record within the same profile (the same phone entry, or card entry, or traveler entry or Activity, etc.) in each database between synchronizations results in only the update that occurred latest in time after the synchronization is performed. For example, if the traveler record for Christine Anderson is updated with a *Courtesy Title* at 9:00 a.m. in the primary database, and the same traveler record for Christine Anderson is updated with a *Gender* at 10:00 a.m. in the sync copy database and synchronization takes place at 11:00 a.m., the result includes a *Gender* but no *Courtesy Title* in Christine Anderson's family record.

A record is defined as any screen that includes an *OK*, *Cancel* or *Apply* button and all the fields included in that screen. To avoid the possible loss of data, we recommend you limit each location to only *viewing* and *adding* records to profiles that are not assigned to its branch. Avoid ***updating*** records that are part of a profile that is not assigned to your branch. We also recommend synchronizing databases on a frequent, regular schedule. Synchronizing databases on a frequent basis (daily) also minimizes the chances of updating the same record between synchronizations and possibly losing data.

What Happens if I Delete Record in One DB and Before Synchronizing, Change Record in Other DB?

Deletions win. Regardless of the time stamp on the modifications, once both databases are synchronized the record is deleted. The exception would be in the case of modifying a profile by adding an invoice and then deleting the profile from the other database between synchronizations.

What Does NOT Synchronize?

Workstation Defaults and certain *Trams Back Office* data including Journal Entries and all General Ledger information other than the End of Period "To Date" do NOT synchronize.

Do Invoices Generated from Res Card in Sync Copy DB Synchronize to Primary DB?

Yes and visa versa. If you plan to use the *ClientBase* Res Card invoicing feature, some setup needs to be done within each database before beginning the on-going sync routine. Each database needs to create a unique starting Invoice number series for each Branch record. This is because the invoice numbers issued through the *ClientBase* Res Card increment by one each time an invoice is issued and to avoid duplicate invoice numbers (which go to unresolved and do not get processed by the synchronization routine), a unique series needs to be established in both the *Primary Database* and the *Sync Copy Database*. This can be done by going to the Utilities menu, selecting the Branch menu and retrieving each Branch Record you plan to use. Within the General Branch Info tab, enter a unique *Next Sales Invoice No* and a unique *Next Refund Invoice No*. This needs to be done in both the *Primary Database* and the *Sync Copy* database and different starting numbers should be used in each.

What If I Do an End of Period in Primary DB, and Before I Sync Out to Branch DB, Someone in Branch Office Generates Invoice from the Res Card Within that Same Closed Period?

The branch database knows the last *End of Period Through* date and does not allow Users to issue invoices within that time frame. In this case though, since the End of Period date has not yet synchronized to the branch, the Res Card allows the User to generate the invoice. After synchronizing that file out of the branch and upon synchronizing the file into the main office, the synchronization program detects the invoice within the closed period and stops the synchronization process; therefore, not allowing that sync file to be synchronized until the End of Period is voided in the Primary database. Since the branch database does not have a way of voiding the invoice, even if that is the desired result, you need to void the End of Period in the Primary database, so that you can Sync In the branch sync file. After syncing in the file, you can then void the Invoice using the Primary database, or reissue your End of Period if the invoice belongs.

Can I Log into *Trams Back Office* From Any Database Other Than the Primary DB?

As mentioned above, no. You can only connect to the *Primary Database* using the *Trams Back Office* program, as synchronization was designed for *ClientBase* not *Trams Back Office*.

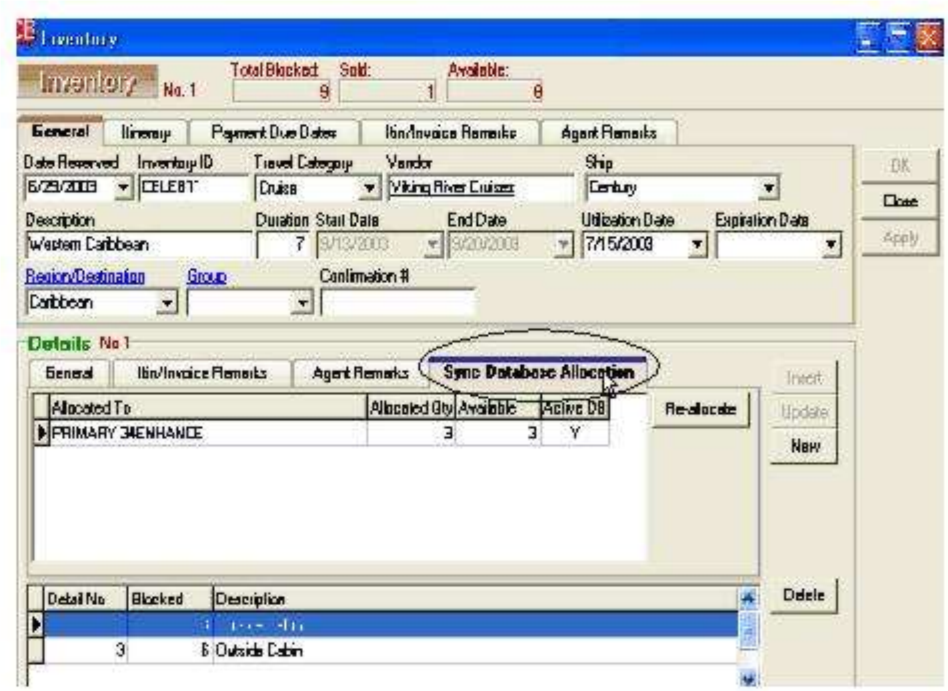
Important Note: Although you cannot log into your Sync Copy Database with the *Trams Back Office* program (*Trams*win.exe), if your agency uses *Trams Back Office* you do need to keep your Sync Copy database upgraded to the same version your Primary database is running. Therefore, anytime you install a *Trams Back Office* update in your Primary location, you will need to run the update in your Sync Copy location as well.

Can I Regenerate Sync File that I've Already Created?

Yes, the synchronization utility defaults to starting the synchronization after the last known exported Sync Change Log data, but you can change this default and start your synchronization file using a Change Log number or a Change Log date.

How Do I Allocate Inventory Among Sync Primary and Sync Copy Databases

In the past, agencies that have been synchronizing with another location were limited to creating and pulling from inventory in only the Primary location. The reason for this limitation was because of the potential to oversell inventory between synchronization processes. To overcome this danger, *ClientBase* has the ability to allocate available inventory across your various sync databases. Sync activated databases have an additional entry tab in *Inventory Details*, called *Sync Database Allocation.*:



Upon creating new Inventory (or updating existing Inventory) look at the count within the *Available Inventory* field. Determine if this inventory should be re-allocated to other sync locations (databases) to facilitate better sales of this inventory. Click the *Sync Database Allocation* tab and *Re-allocate* to re-allocate any quantity available from your current database to any other Sync Copy database.

The system allocates the inventory to the database the user is connected to. When an agent *Pulls From Inventory,* they are only able to pull inventory allocated to the database they are connected to. As agents use the inventory feature within the Res Card, if they determine that they have a client interested in inventory that is no longer available, they click the *View Inventory Record* and the *Sync Database Allocation* tab to see if there is available inventory in other locations (databases). If so they may suggest re-allocated some of that available inventory to locations (databases) that no longer have any available to them. To re-allocate inventory from one location (database) to another, you must connect to the database that has the available inventory. You can only re-allocate inventory from the database you are connecting to and you can only re-allocate inventory of the database has available inventory records to re-allocate.

*****Important Note for agencies syncing to CBB Hosted:** If you are synchronizing to the Hosted *ClientBase* Browser application, **DO NOT** allocate inventory to that database unless you are OK with not being able re-allocate it back out of CBB Hosted!

ClientBase Browser does not yet include the Inventory Manager and therefore does not have the ability to re-allocate its unused available inventory back to other databases. This means any inventory allocated to CBB Hosted, will have to be sold via CBB Hosted.

Chapter 25: Sabre Host Command Utility

This section covers to use the Sabre Host Command Utility with Sabre Red.

Introduction

Agents (especially Corporate Agents) have become accustomed to working in the GDS screens and benefit from the efficiencies of using the native command line entries. For some, toggling to *ClientBase* to query a profile and selecting for merging to a PNR is not a natural part of their current workflow and may cost them in key strokes which ultimately increases the time it takes to process certain transactions.

This utility is designed to allow agents to maintain keyboard commands (no extra mouse work), using their native Sabre command line entries to query for *ClientBase* profiles, view result lists, move a profile or traveler into their current PNR, and display the *ClientBase* PNR selection window for viewing and accessing all profile PNR data including optional move entries.

To accomplish this Sabre Red Workspace must be running so that a connection can be made to the *ClientBase* database via the Sabre Host Command Utility.

Set Up Sabre Red Workspace

Before using the Sabre Host Command Utility for the first time, launch Sabre Red Workspace and verify that the Sabre Emulator API is checked. This is found under **Tools|Agency Applications|Configure agency applications|Sabre System|Advanced**. The Sabre Host Command Utility cannot operate without the *Sabre Emulator API*.

Set Up the Sabre Host Command Utility

The Sabre Host Command Utility automatically installs the SabreInt.exe file in a Host Command folder when the *ClientBase* installation file is run. The utility will launch each time the computer is started and an icon will sit in the system tray, letting you know that it is running.

When the installation is complete, the utility will automatically open on your screen and an icon will sit in the system tray, letting you know the utility is running. Connect to the *ClientBase* database by logging into the utility.

Connect To: Select *ClientBase Windows*

Alias Name: Click the down-arrow and select the correct Alias. Once the Alias is chosen, the Alias Path is automatically completed.

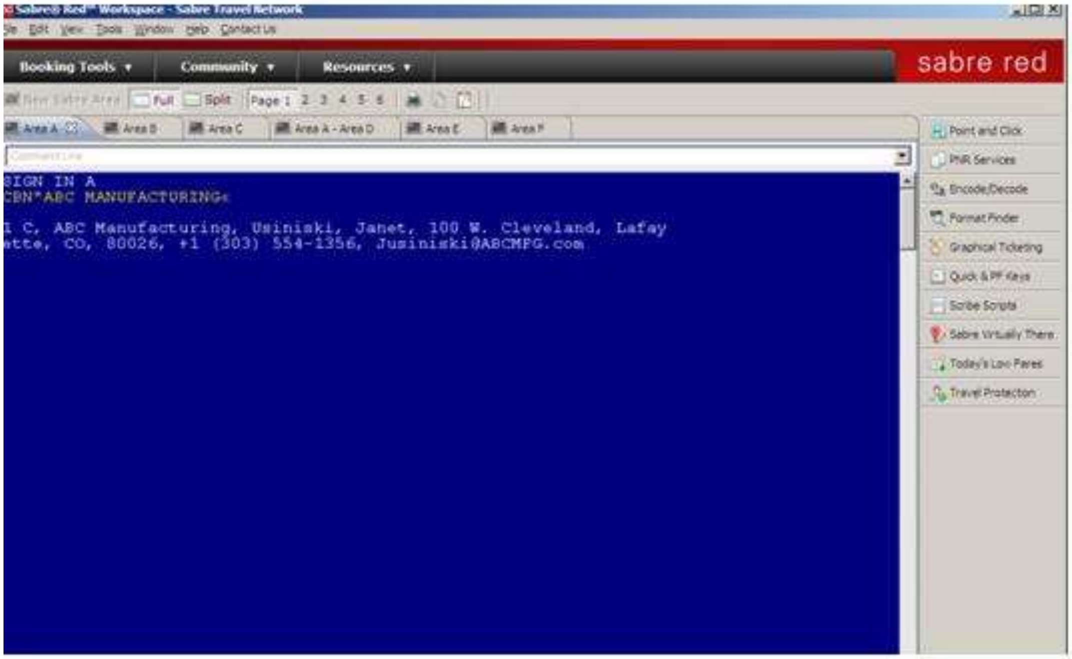
User Name/Password: Enter your *ClientBase* User Name and Password and click *Login*. A message will appear confirming that the database is connected.

Once connected, click the *Hide* button. To view the utility screen again at any time, right-mouse click on the icon in the system tray and select Open. To completely close the utility, right-mouse click on the icon in the system tray and select *Exit*.

ClientBase Query Commands

From the Sabre Red Workspace emulator, use the following command line entries to query profiles in *ClientBase* and display results, select a result to move into the current PNR and select a result to launch the Merge to PNR selection screen.

To query for profiles there are two format options. Query by profile name or query by traveler/contact.



QUERY BY NAME

CBN*[Profile Name]-[Traveler Last/Traveler First][enter]

Queries all client type profiles based on "starts with" type search operator and displays listing of matching records by Profile Name (if no traveler data entered) or by Traveler (if traveler data is entered)

Examples:

CBN*ABC MANUFACTURING-USINISKI/JANET (displays profile that matches with the profile name and traveler name)

CBN*ABC (displays one line per profile that matches with Profile Name starting with ABC)

CBN*ABC-SMITH (displays one line per traveler that matches with profile name starting with ABC and traveler last name starting with Smith)

CBN*JONES/MIKE (displays one line per profile that matches with profile name Jones/Mike)

CBN*JONES/MIKE-JONES/TINA (displays one line per traveler/contact that matches with profile name Jones/Mike and traveler Jones/Tina)

Profile information from the query results for each matching profile appears in following order:

Profile Type, Profile Name, Last Name, First Name, Address 1, City, State, Primary Phone, Primary Email

QUERY BY TRAVELER

CBP*[Traveler Last]/[Traveler First][enter]

Queries all client profiles and displays listing by Traveler (family/contact)

Examples:

CBP*ABLE/KEN (displays one line per family/contacts whose last name starts with Able and first name starts with Ken)

CBP*ABLE (displays one line per traveler/contact whose last name starts with Able)

Traveler information from query results for each matching profile appears in following order:

Profile Type, Traveler Last Name, Traveler First Name, Profile Name, Address 1, City, State, Primary Phone, Primary Email

PNR COMMANDS

CB*[Line#][Enter] - If an agent wants to display all PNR data (including all Optional entries) for one of the profiles included in the current query results, by launching the *ClientBase* Merge to PNR selection screen window, use the command CB*[Line#][Enter]. This launches the window for the Merge to PNR selection screen for the line number chosen from the results.

Example: CB*3 (Launches the window for the Merge to PNR selection screen for Line #3 of the query results.)

If Traveler/Contact Name is included in the selected line item then that traveler is defaulted to the top of the selection screen with name checked (other travelers are included as well but default to unchecked). User then selects any other Optional entries and uses this screen to click Send to PNR.

CBNM[Line#][Enter] - If an agent wants to automatically move all Always Move Entries for one of the profiles included in the current query results into the current PNR, enter CBNM[Line#][Enter]. This automatically moves all Always Move Entries in the PNR without displaying the selection screen. If Traveler Name is included in the selected line item, the traveler is defaulted along with all of the always move items.

Example: CBNM3 (Automatically moves data from profile results included in line 3 of the query results.)

CBN*[ProfileName]-[TravelerLast/travelerFirst][End]NM - If an agent wants to move a specific traveler from a profile, use this command. If there is no profile/traveler found, agent is prompted, "No Profile to move." If there are multiple profile/travelers found, the first one on the list is moved.

Example: CBN*ABLE/KENNETH-ABLE/JOHN§NM (Automatically moves data for traveler John Able who is a part of Kenneth Able's profile.)

Additional Commands

CBMD - When query results are displayed, five results are listed at a time. To display more results enter the command CBMD to move down.

CBMU - When viewing query results, to move up to a previous set of results, enter the CBMU command.

CBHELP - Displays the list of all *ClientBase* command formats.