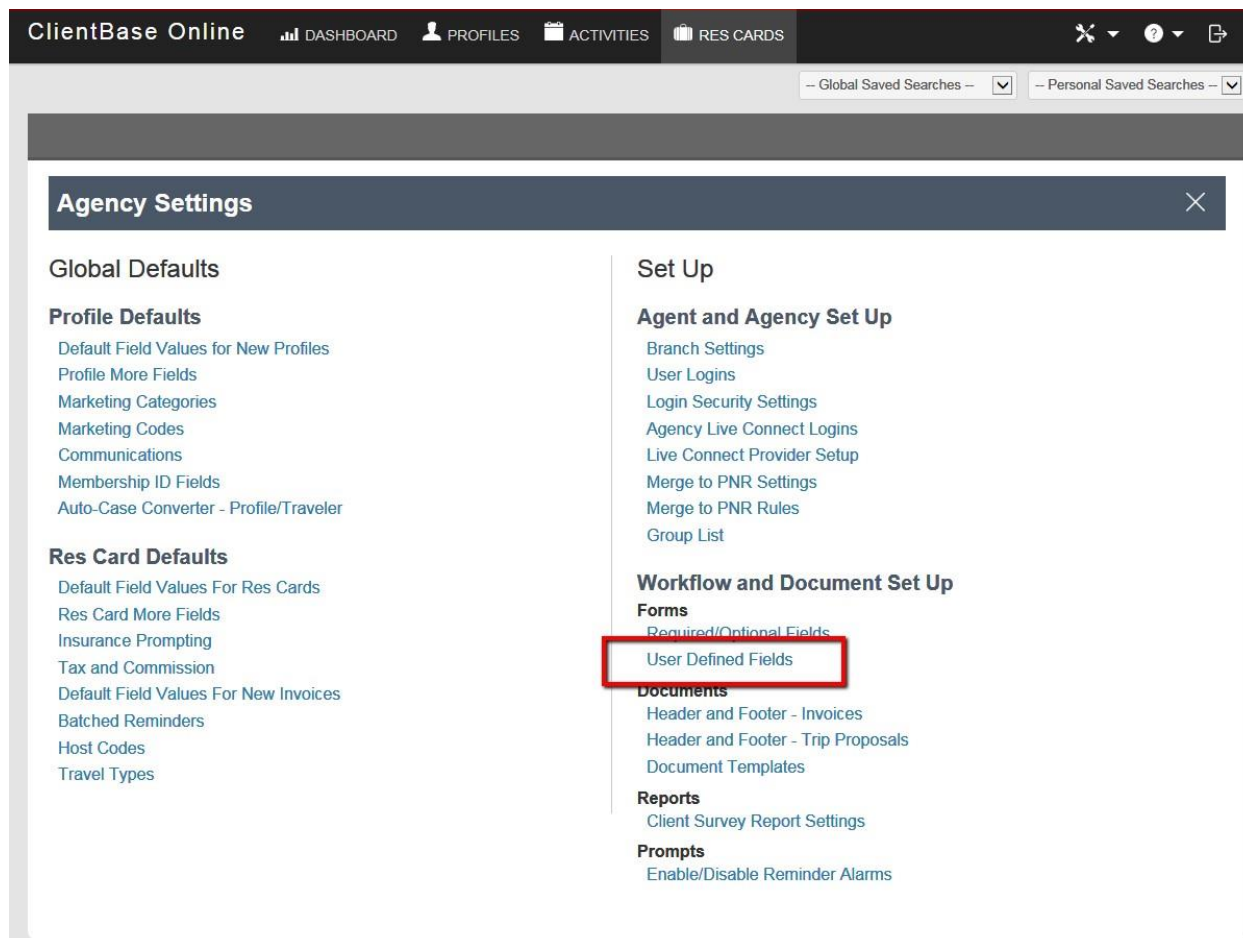# ClientBase Online

ClientBase Agent Dashboard Best Practices and Query Details

User Defined Fields
You'll want to have a list of reminders your agency wants to use set up under User Defined Fields.

Set up under:

Tools > Settings > Workflow and Document Set Up > User Defined Fields > Subject for Reminder

While it may not be practical for every agency to remove the ability to free flow reminder subject titles, we recommend that you have a process in place for advisors to request a new subject to be added. Using the same subject titles consistently, every time a reminder is created, makes it easy for all advisors to find all the reminders of the same type.

For example: **Final Payment Due** versus a free flow entry of **Final Pymt Due**

Field: Subject for Reminder

Allow "Free Flow" ☑

We recommend unchecking the Allow "Free Flow" box if you have an administrator or manager who can update these fields as needed.

Subject for Reminder

Agent Follow Up
Bi-Annual Touch Base
Bi-Annual Touch Base
Birthday Card
Brochure
Check Flight Options
Check for Commission
Check for Documents
Check for Payment
Client Meeting
Confirm Seat Assignments
Copies of Passport Received
Deposit Due
Disclaimer Signed
Final Payment Due
Five Days after Trip Inquiry
Follow Up
Holiday Card
Information
Insurance Follow Up
Inventory Review
Issue Invoice
New Lead
Online Check-in Reminder
Passport Reminder
Print or Email Travel42 Report
Send Gift
Send Invoice Disclaimer
Six months after Trip Inquiry
Staff Meeting
Three days after Trip Inquiry
Touch Base
Touch Base - Dress Code
Touch Base - Referral

The **Reservation Cycle** is also an important User Defined field used in the Dashboard queries. You'll want to make sure you have appropriate options set up for your agency.

- For the Dashboard to find Res Cards with trips that have been quoted to clients or are currently under consideration by the client, you will need to make sure you have Reservation Cycle options of **Under Consideration** and **Quoted.**
- For the Dashboard to find Res Cards that are new trip inquires that need to be worked on, you will need to make sure you have a Reservation Cycle option of **Lead**

Set these up under:
Tools > Settings > Workflow and Document Set Up > User Defined Fields > Reservation Cycle

Templates

We recommend creating your own agency templates for various quick email messages you would like to send out to your clients straight from the Dashboard. *Please note: Permissions to create templates may be restricted to your agency administrator or manager.

To create templates: **Tools > Settings > Workflow and Document Set Up > Document Templates**

Use **New** to create a new template and **Delete** to remove an existing template. Insert Merge fields into your template by first putting your cursor within the template body where the merge field is desired, then clicking on the merge field in the listing to the right. Use **Save** to overwrite an existing template and **Save As** to save as a new template name.

If you have selected the Document Format of HTML, a new screen appears with a formatting toolbar is included that makes customizing your text, inserting links, pictures and tables simple.

Please note: this HTML formatting toolbar is only available when the template is launched via Merge to Email. All Templates launched through the Merge to Doc Template feature are converted to Plain Text format when opened in Microsoft Word.

Note to ClientBase Windows Users: Document Templates are shared between ClientBase Online and ClientBase Windows, and changes made in either application are reflected in both. Please note that there is one very important difference between Document Templates created in ClientBase Windows and Document Templates created in ClientBase Online. ClientBase Windows saves Document Templates as .rtf (Rich Text Format), which means the text can be formatted with different fonts and color and that graphics can be inserted. Since web applications do not utilize .rtf, ClientBase Online must open any existing .rtf Document Template and convert it to txt (Plain Text). What that means is, if a Document Template is created or modified in ClientBase Windows. then opened in ClientBase Online, it will convert to plain text (stripping all formatting and graphics) and save it as plain text.

To avoid losing formatting features within Document Templates created in ClientBase Windows, we prompt with a warning message before overwriting a .rtf Document Template with plain text. If you use formatting within your Document Templates, then we recommend you make all changes to existing Templates in ClientBase Windows and only add new Templates in ClientBase Online.

Access Permissions & Query Parameters
*All areas of the Dashboard obey the settings in our standard security groups, branch rights, and agent permissions.

Important Dates
- Advisors are permitted to view all **Final Payment Reminders** that have been assigned to their user login name. The query shows all open reminders whose subject starts with "Final Payment" and whose due date falls within the specified date range.
- Advisors are permitted to view all **Agent Reminders** that have been assigned to their user login name. The query shows all open reminders whose due date falls within the specified date range.
- Advisors are permitted to view all **Birthdays** in which they are listed as the Primary Agent for the profile that the birthday person is in. The query shows all travelers whose birthday falls within the specified date range.
- Advisors are permitted to view all **Anniversaries** in which they are listed as the Primary Agent for the profile that the anniversary is in. the query shows all profiles with a special date of type "Wedding Anniversary" that falls within the specified date range.

Travel
- **Currently Traveling –** Advisors are permitted to view all Res Cards where the Res Card Agent is equal to the Agent Profile assigned to the user's log in. The query shows all active Res Cards whose trip date range includes today's date. The Res Card must have at least one invoiced reservation.
- **Traveling Soon –** Advisors are permitted to view all Res Cards where the Res Card Agent is equal to the Agent Profile assigned to the user's log in. The query shows all active Res Cards whose trip dates are within the specified date range. The Res Card must have at least one invoiced reservation.
- **Just Returned –** Advisors are permitted to view all Res Cards where the Res Card Agent is equal to the Agent Profile assigned to the user's log in. The query shows all Res Cards with a status of

either Active or Departed whose trip end date is within the last 14 days. The Res Card must have at least one invoiced reservation.

- **Quoted (Proposals) –** Advisors are permitted to view all Res Cards where the Res Card Agent is equal to the Agent Profile assigned to the user's log in. The query shows all active Res Cards with a Reservation Cycle that contains "Under Consideration" or "Quoted".
- **Trip Inquiry (Leads) –** Advisors are permitted to view all Res Cards where the Res Card Agent is equal to the Agent Profile assigned to the user's log in. The query shows all active Res Cards with a Reservation Cycle that contains "Lead"
- **Getting Restless –** Advisors are permitted to view all profiles where they are the Primary Agent assigned to the profile. The query presents active profiles that have traveled within the past 6 months, but have no new Res Cards for travel within the next year (365 days).

Recently Modified

- **Recent Profiles –** This tab shows all Profiles that were created or modified by the logged in user in the last 24 hours. All normal profile viewing and editing permissions apply.
- **Recent Res Cards –** This tab shows all Res Cards that were created or modified by the logged in user in the last 24 hours. All normal res card viewing and editing permissions apply.
- **Recent Reservations –** Presents all Reservations that were created or modified by the logged in user in the last 24 hours. All normal activity viewing and editing permissions apply.

Sort Default
While we are not currently offering custom default sort settings, you do have the ability to click on any of the column headers to re-sort information to your preference.

Here is the default sort upon first loading the Agent Dashboard:

Important Dates
- **Final Payments –** Ascending by Activity Date/Time
- **Agent Reminders –** Ascending by Activity Date/Time
- **Birthday –** Ascending by Birthday (ignores year)
- **Anniversary –** Ascending by Special Date (ignores year)

Travel – Sales Pipeline
- **Currently Traveling** - Ascending by Trip Start Date
- **Traveling Soon** - Ascending by Trip Start Date
- **Just Returned** - Ascending by Trip End Date
- **Quoted** - Descending by Create Date
- **Trip Inquiry** - Ascending by Create Date
- **Getting Restless –** Ascending by Profile Name

Recently Modified

- **Recent Profiles –** Descending order by date/time of creation or modification
- **Recent Res Cards** - Descending order by date/time of creation or modification

- **Recent Reservations** - Descending order by date/time of creation or modification

Names/Links presented on Recently Modified

- **Recent Profiles** – Displays Primary Profile name
    - o Links you to General Information page of the Profile
        - **Recent Res Cards** – Displays lead Res Card Traveler name, Res Card number and Res Card Trip Name
            - o Links you to Reservations overview page of the Res Card
- **Recent Reservations** – Displays lead Reservation Traveler name and the reservation vendor name
    - o Links you directly to the reservation within the Res Card