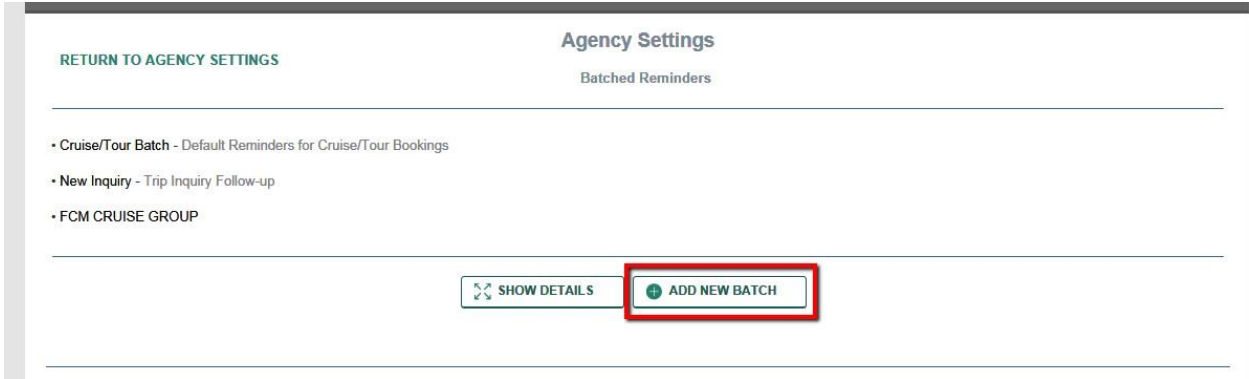


Batched Reminders setup in ClientBase Online

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



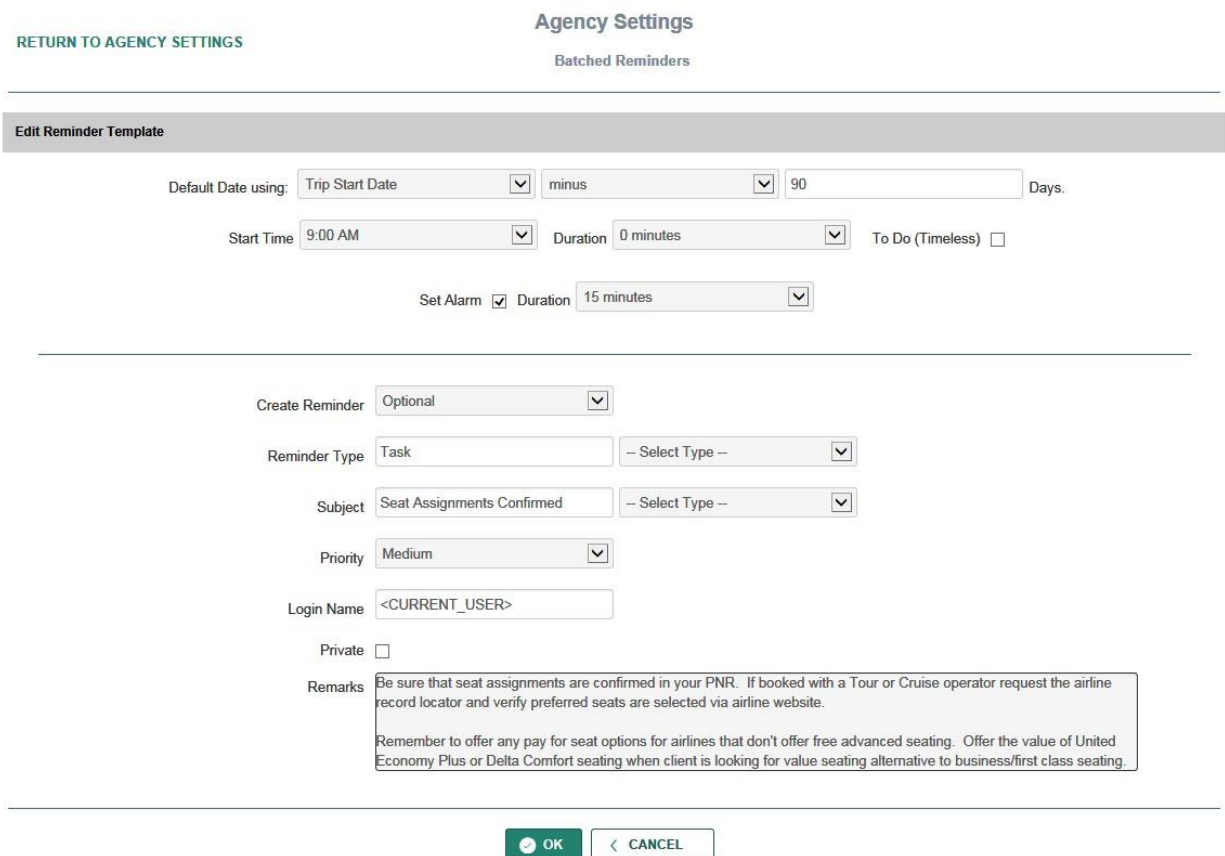
RETURN TO AGENCY SETTINGS

Agency Settings

Batched Reminders

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

SHOW DETAILS ADD NEW BATCH



RETURN TO AGENCY SETTINGS

Agency Settings

Batched Reminders

Edit Reminder Template

Default Date using: Trip Start Date minus 90 Days.

Start Time 9:00 AM Duration 0 minutes To Do (Timeless) ☐

Set Alarm ☒ Duration 15 minutes

Create Reminder Optional

Reminder Type Task -- Select Type --

Subject Seat Assignments Confirmed -- Select Type --

Priority Medium

Login Name <CURRENT_USER>

Private ☐

Remarks Be sure that seat assignments are confirmed in your PNR. If booked with a Tour or Cruise operator request the airline record locator and verify preferred seats are selected via airline website.
Remember to offer any pay for seat options for airlines that don't offer free advanced seating. Offer the value of United Economy Plus or Delta Comfort seating when client is looking for value seating alternative to business/first class seating.

OK CANCEL

Reminder Date: These Global Reminder settings need to use Merge fields for dates. When launching the Batched Reminders from within a Res Card, the appropriate Reminder Date will be calculated and populated. This defaulted date for the Reminder can be changed at the time of creating the Batched Reminders, just before Creating and Saving them to the Res Card Activities tab.

Default Date Using: Select from: Current Date, Res Card Create Date, Res Card Start Date, or Res Card Return Date.

Plus/Minus: Select plus or minus from the drop-down.

Number of Days: Enter a number from 1 to 2000

For example: *If you want to create a reminder to follow up with a client to see how their trip went, you might choose to use "Res Card Return Date Plus 7 days." When this reminder is added to the Res Card, it will create a reminder that will pop up one week after the client has returned home.*

Create Reminder: Select **Always** or **Optional**. When launching a Batch of Reminders from a Res Card, a listing of the default Reminders appears. To be created, each Reminder within the listing must be selected. If this field is set to Always, then the selection box for this Reminder will be checked by default. If this field is set to Optional, then the selection box for this Reminder will not be checked by default.

The remaining fields are identical to those fields included in a single Reminder Record. Complete each field and the Reminder populates the field upon creating the Batched Reminders within a Res Card. Enter default entries for: **Timeless, Start Time, Duration, Login Name, Priority, Private, Reminder Type, Subject, Set Alarm, Completed and Remarks**. Click **OK** to save your first Reminder within this Batch.

Tip: If you are an agency database administrator, you may want to consider adding a remark message to remind travel advisors of the importance of said reminder. Another nice feature is that this message will also show up when the reminder pops up if they are syncing reminders with their e-mail calendar.

Here is an example message for a reminder to confirm seat assignments:

Be sure that seat assignments are confirmed in your PNR. If booked with a Tour or Cruise operator request the airline record locator and verify preferred seats are selected via airline website.

Remember to offer any pay for seat options for airlines that don't offer free advanced seating. Offer the value of United Economy Plus or Delta Comfort seating when client is looking for value seating alternative to business/first class seating.

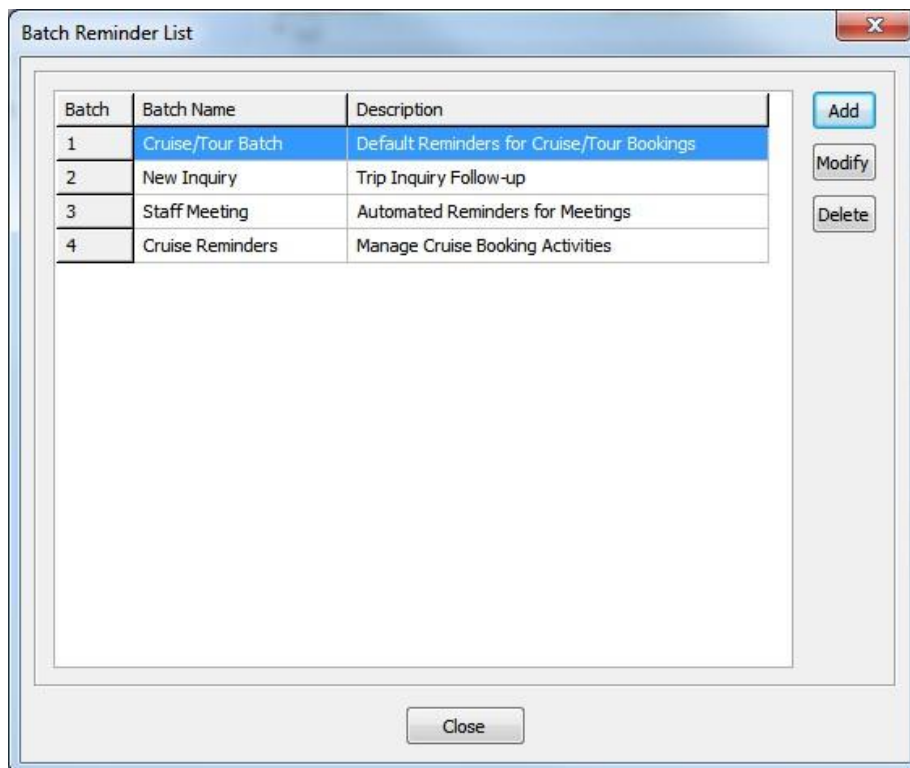
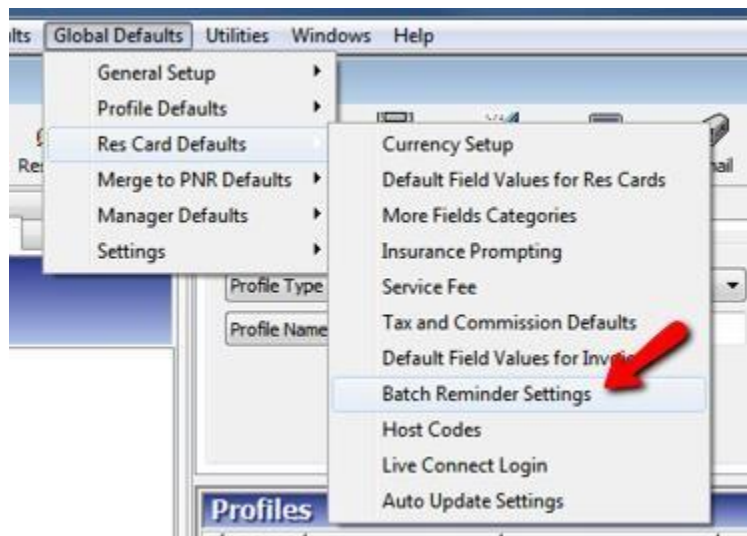
Continue to add as many default Reminders as you would like included within this Batch of Reminders

After each default Reminder is created for this batch, click **Save Changes** to save the Batch. Create more than one Batch of Reminders if desired. For example, if you would like different default Reminders for a Tour booking then for a Cruise booking, or for reminders specific to Group bookings, or even for Trip Inquiry follow up reminders, then add another Batch of Reminders accordingly.

*If your agency syncs between ClientBase Windows and ClientBase Online, then you will need to set up your Batched Reminders from ClientBase Windows.

Batched Reminders setup in ClientBase Windows

Global Defaults > Res Card Defaults > Batched Reminder Settings



Batch Reminder Setup

Batch Reminder Name: Cruise/Tour Batch Description: Default Reminders for Cruise/Tour Bookings

Selected	Date of Rem	Start Time	Reminder Typ	Subject	Duration	Timeless	Login Name	Priority	Private	Set Alarm	Alarm Time	Completed
No	Current Date	9:07 AM	Phone Call	Deposit Due	0 hours, 15 mir	No	<Current Us	High	No	Yes	12/30/1899	No
Yes	Trip Start Dal	9:07 AM	Phone Call	Final Payment Due	0 hours, 15 mir	No	<Current Us	High	No	Yes	12/30/1899	No
Yes	Current Date	9:07 AM	Task	Send Invoice Disclaime	0 hours, 15 mir	No	<Current Us	High	No	Yes	12/30/1899	No
Yes	Current Date	9:07 AM	Task	Travel Document Requ	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
No	Current Date	9:07 AM	Task	Copies of Passports Re	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
No	Trip Start Dal	9:07 AM	Task	Visa Reminder	0 hours, 15 mir	No	<Current Us	High	No	Yes	12/30/1899	No
No	Current Date	9:07 AM	Task	Check Flight Options	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
No	Trip Start Dal	9:07 AM	Task	Seat Assignments Con	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Current Date	9:07 AM	Task	Insurance Follow Up	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Current Date	9:07 AM	Task	Disclaimer Signed	0 hours, 15 mir	No	<Current Us	High	No	Yes	12/30/1899	No
Yes	Trip Start Dal	9:07 AM	Task	Print or Email Travel42	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Trip Start Dal	9:07 AM	Task	Check for Documents -	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
No	Current Date	9:07 AM	Task	Online Check-in Remin	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Trip Start Dal	9:07 AM	Task	Documents Picked Up/	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Trip Return D	9:07 AM	Task	Update Status and Re	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Trip Return D	9:07 AM	Phone Call	Welcome Home	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Trip Start Dal	9:07 AM	Task	Referral Program Intro	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
No	Trip Start Dal	9:07 AM	Task	Send Gift	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No
Yes	Trip Return D	9:07 AM	Task	Check for Commission	0 hours, 15 mir	No	<Current Us	Medium	No	Yes	12/30/1899	No

OK Cancel

Batch Reminder Design

Create Reminder: Optional

Date: Default Date Using: Trip Start Date plus/minus: - Number of Days: 90

Time: ☐ To Do (Timeless) Start Time: 9:07 AM Duration: 15 minutes

Login Name: <Current User> Priority: Medium ☐ Private Reminder Type: Task

Subject: Seat Assignments Confirmed

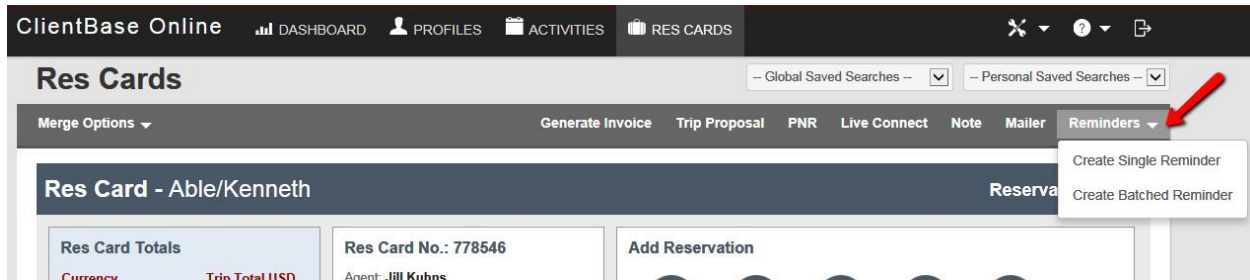
☒ Set Alarm 15 minutes prior to scheduled time of Reminder ☐ Completed

Remarks: Be sure that seat assignments are confirmed in your PNR. If booked with a Tour or Cruise operator request the airline record locator and verify preferred seats are selected via airline website.
Remember to offer any pay for seat options for airlines that don't offer free advanced seating. Offer the value of United Economy Plus or Delta Comfort seating when client is looking for value seating alternative to business/first class seating.

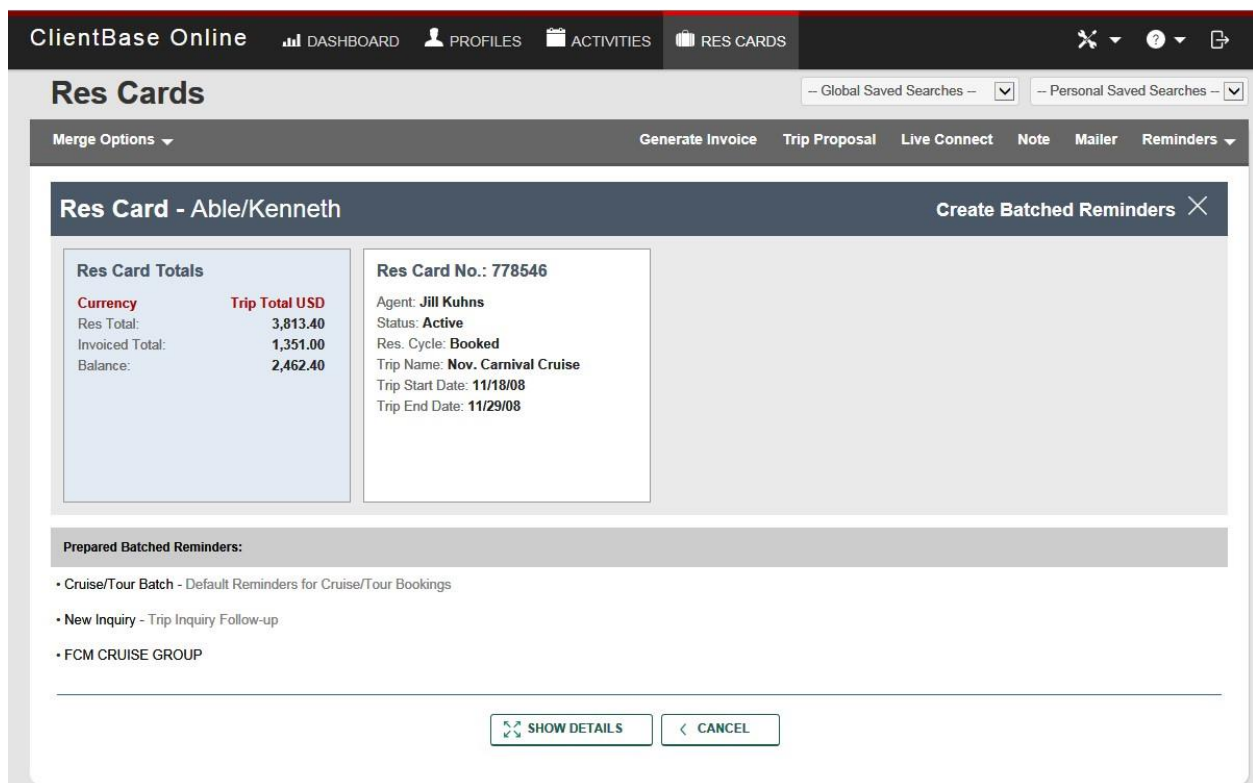
OK Cancel

Using Batched Reminders

From inside the Res Card that you would like to add reminders, click on the **Reminders** drop-down in the tool bar at the top of the page and select **Create Batched Reminder**.



Select the Batched Reminder group you want to use.



Select all reminders you need for this trip, then click Create Reminders. If you want to sync your reminders between ClientBase Online and your e-mail calendar, you can set it from the drop-down options on this page or you can select your default setting under **User Settings** in **My Login**.

Edit Batch

Cruise/Tour Batch

Default Reminders for Cruise/Tour Bookings

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

	Create	Date	Start Time	Reminder Type	Subject	Login Name	Duration	Timeless	Priority	Private	Completed	Completion
Edit	<input type="checkbox"/>	08/22/2008	9:00 AM	Task	Seat Assignments Confirmed	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/12/2018	9:00 AM	Task	Travel Documents Requirements	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/17/2018	9:00 AM	Task	Copies of Passports Received	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/24/2018	9:00 AM	Task	Insurance Follow Up	SYSDBA	0 minutes	No	Medium	No	No	
Edit	<input checked="" type="checkbox"/>	12/17/2018	9:00 AM	Task	Disclaimer Returned	SYSDBA	0 minutes	No	Medium	No	No	

+

ADD

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

Update E-mail Calendar when Reminder is Created:

Never

+

CREATE REMINDERS

<

CANCEL

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

Update E-mail Calendar when Reminder is Created:

Never

for All Reminders

Only for Reminders set for a Time

Only for Reminders set with an Alarm

+

CREATE REMINDERS

<

CANCEL

Tools > My Login > User Settings

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

My Login

User Settings

Saved Search Defaults

Profile Defaults

Communication Defaults

Live Connect

PNR Import

E-Mail Settings

Login Name:

SYSDBA

Sabre PCC:

BETA

Enable SSO: CBO Enabled: Sabre Agent ID:



Password:

User Name:

SYSDBA

Title:

E-Mail:

jill.kuhns@sabre.com

Automatically Update Email Calendar for Uncompleted Reminders:

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

Agent Profile:

Jill Kuhns

Security Levels:

Custom



ADVANCED

☐ Disable Account

SAVE

CANCEL