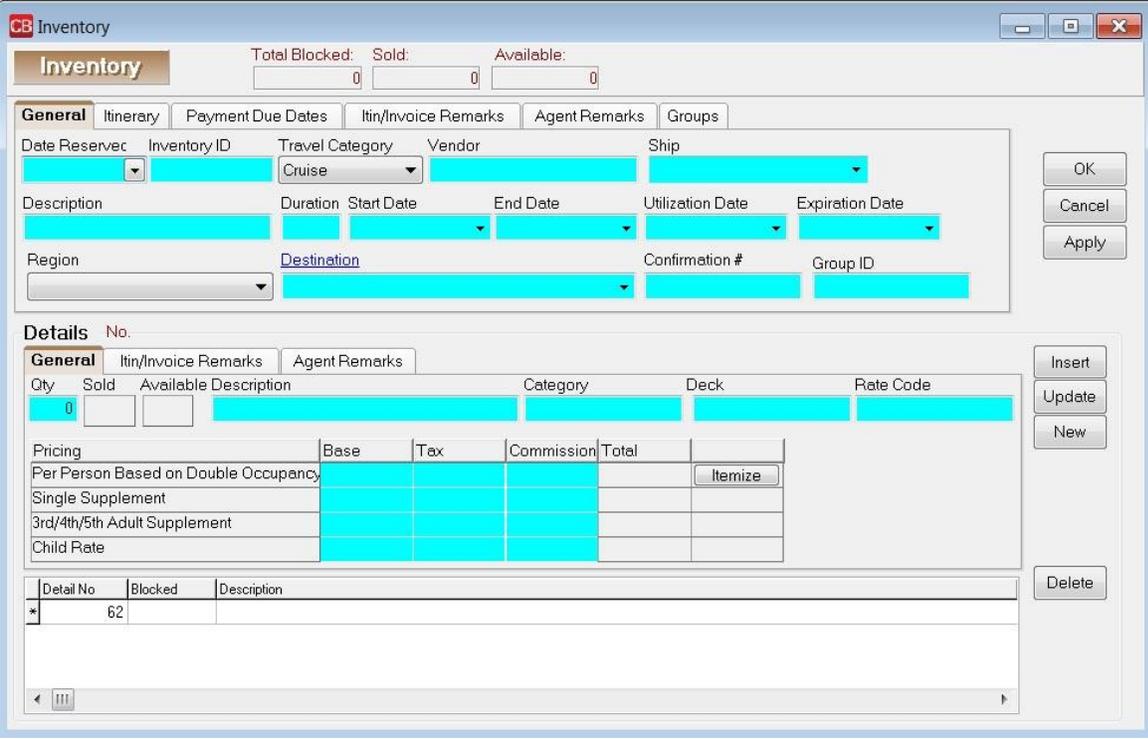


Creating and Using Inventory

Setting up Inventory Records in ClientBase

Inventory items can be created from anywhere in the program:

- Clicking the *Inventory* button  on the tool bar or
- Going to **File|New|Inventory** or
- Right-mouse clicking in the results screen of the Inventory Manager and selecting *Add*.



The screenshot shows the 'Inventory' window in ClientBase. At the top, there are fields for 'Total Blocked: 0', 'Sold: 0', and 'Available: 0'. Below this is a tabbed interface with 'General' selected. The 'General' tab contains several fields: 'Date Reservec' (dropdown), 'Inventory ID' (text), 'Travel Category' (dropdown, set to 'Cruise'), 'Vendor' (text), 'Ship' (dropdown), 'Description' (text), 'Duration' (text), 'Start Date' (dropdown), 'End Date' (dropdown), 'Utilization Date' (dropdown), 'Expiration Date' (dropdown), 'Region' (dropdown), 'Destination' (text), 'Confirmation #' (text), and 'Group ID' (text). To the right of these fields are 'OK', 'Cancel', and 'Apply' buttons. Below the 'General' tab is a 'Details' section with a 'No.' field. It has sub-tabs for 'General', 'Itin/Invoice Remarks', and 'Agent Remarks'. The 'General' sub-tab contains a table with columns: 'Qty', 'Sold', 'Available', 'Description', 'Category', 'Deck', and 'Rate Code'. The first row shows '0' in the 'Qty' column. Below this table is a 'Pricing' section with columns: 'Base', 'Tax', 'Commission', 'Total', and 'Itemize'. The 'Pricing' section includes rows for 'Per Person Based on Double Occupancy', 'Single Supplement', '3rd/4th/5th Adult Supplement', and 'Child Rate'. To the right of the pricing section are 'Insert', 'Update', and 'New' buttons. At the bottom of the 'Details' section is a table with columns: 'Detail No', 'Blocked', and 'Description'. The first row shows '*' in the 'Detail No' column and '62' in the 'Blocked' column. To the right of this table is a 'Delete' button.

One inventory record can include multiple Inventory Details. *Inventory Details* include Quantity, Description and pricing. For example, we have blocked space for 2 different categories of cabins on a November sailing of Royal Caribbean's Voyager. You would have one inventory record with 2 Inventory Details, one for each cabin category with the quantity blocked and it's pricing.

Inventory No. 35 Total Blocked: 28 Sold: 0 Available: 28

General Itinerary Payment Due Dates Itin/Invoice Remarks Agent Remarks Groups

Date Reserved: 2/6/2015 Inventory ID: SHARON Travel Category: Cruise Vendor: Royal Caribbean Cruises Ship: Voyager of the Seas

Description: 7-night Eastern Caribbean Duration: 7 Start Date: End Date: Utilization Date: Expiration Date:

Region: Bermuda & Caribbean Destination: [Caribbean - Eastern/Caribbean - Western] Confirmation #: 99123 Group ID:

Details

Qty	Sold	Available	Description	Category	Deck	Rate Code
12	0	12	Inside	IS		

Pricing	Base	Tax	Commission	Total	
Per Person Based on Double Occupancy	850.00	250.00	85.00	1,100.00	Itemize
Single Supplement	850.00		85.00	850.00	
3rd/4th/5th Adult Supplement	600.00	250.00	60.00	850.00	
Child Rate	600.00	250.00	60.00	850.00	

Detail No	Blocked	Description
50	12	Inside
63	16	Deluxe Oceanview w/Verandah

General Tab (Top) Depending on the Travel Category selected, different tabs of information appear with different fields of information within those tabs.

- **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 your inventory items. For example, our Cruise ID might read, CR110104 (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:** Fill in the Service Provider profile that applies. For example, our vendor is Royal Caribbean and the service provider would be Voyager.
- **Description:** Type in a unique description to identify this inventory item. For example, our cruise is described as Western Caribbean (Location of cruise)
- **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:** Type when this item can be used, or double-click the utilization date off the calendar accessible from the drop-down menu. The utilization date can also mean the date by which the Inventory must be sold to avoid penalty. Agency can choose either interpretation.
- **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:** If you are tracking where clients are traveling, from the drop-down menu, select an area.
- **Destination:** Enter the region/destination of the trip from a detailed list in the drop-down menu.
- **Confirmation #:** Enter a confirmation number.
- **Group ID:** Track details of group cruise contracts. 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)

To enter detailed itinerary information to print on **Itineraries | Invoices** generated from Res cards click the *Itinerary Tab*:

- Click *Itinerary* to complete all desired fields.
- Click *Insert* to add information
- 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*.

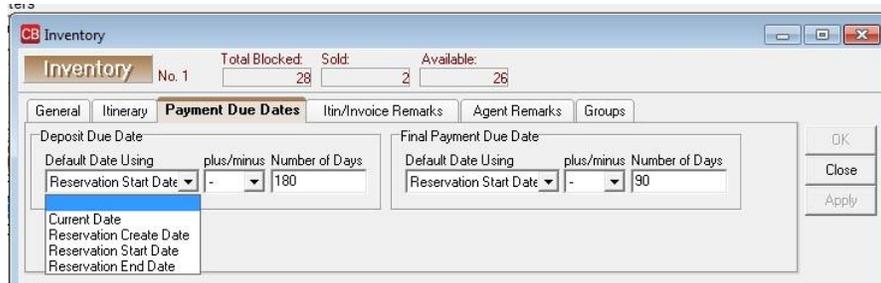
Start Date/Time	Start City Code	Start City
	FLL	Ft Lauderdale
	NAS	Nassau
	EYW	Key West

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.
- **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

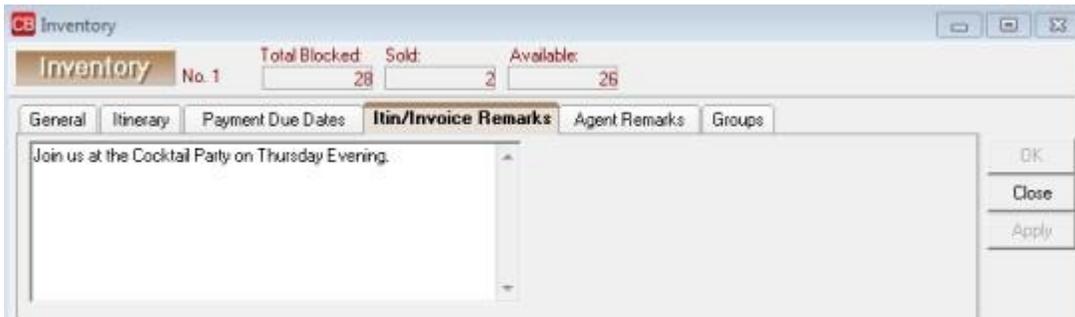
select the plus or minus sign and choose the number of days from 1 to 2000 to use in combination with the *Default Date Using* field.

These dates will be used when you create Reminders.



Itin/Invoice Remarks Tab (Top)

Enter free-flowing Itinerary/Invoice Remarks that appear on the generated Itinerary and Invoice in the Res card.



Agent Remarks Tab (Top)

Enter free-flowing remarks that do not appear on the generated itinerary and invoice.



Groups Tab (Top)

Add a Group name to the inventory record.



Details (Bottom)

General Tab

- **Qty:** Type in the number of available items. For example, we have 20 inside cabins and 10 outside cabins.
- **Sold/Available:** This area keeps track of what has been sold and what is still available
- **Description:** Type in any identifying description such as with our cruise – outside cabins or inside cabins.
- **Class of Service/Category-Deck/Room Type/Tour Name:** Depending on the Travel Category selected in section above, fill in the appropriate data. With our cruise we are entering Category 8 Empress Deck.
- **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*. The more complete your pricing information within your Inventory Detail, the more accurate the default pricing is when your agents are pulling from this inventory record
- **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.

Quantity	Description	+/-	Base	Tax	Commission	Total Fare
1.00	Inside Cabin	+	850.00	250.00		
1.00	Agency Promo	-	200.00	0.00		
1.00	Taxes	+	200.00	0.00		

Totals:	Base	Tax	Commission	Total Fare
	850.00	250.00	85.00	1,100.00

Itin/Invoice Remarks Tab (Bottom)

Enter free-flowing Itinerary/Invoice Remarks that appear on the generated Itinerary and Invoice in the Res card.

Agent Remarks Tab (Bottom)

Enter free-flowing remarks that do not appear on the generated itinerary and invoice.

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.

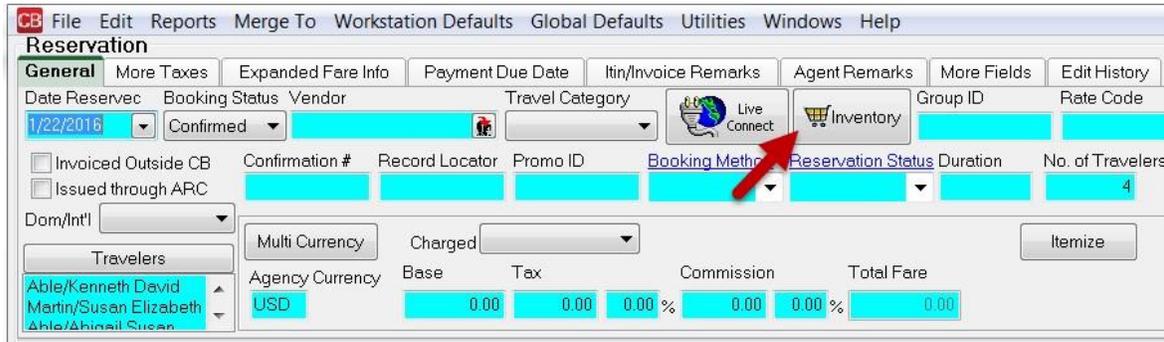
The screenshot shows the 'Res Card' application window. The 'Travelers' list is visible, and the 'Copy' button in the right-hand toolbar is highlighted with a red arrow, indicating the next step in the process.

- Enter the criteria you know about your client's trip needs and click OK to view a listing of the inventory.

The 'Inventory Query Level 2' dialog box is shown, with the 'OK' button circled in red, indicating the next step in the process.

You can also query 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)

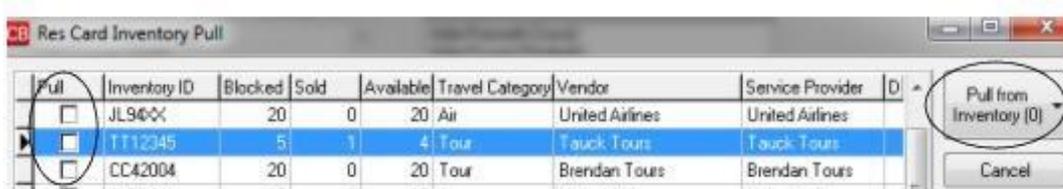
- Click *Inventory*
- A Level 2 Inventory query screen as outlined above appears to query inventory items based upon the travel needs of the client.



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.

- Select the inventory 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 which is only available for Sabre Cruise.



- 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.

- o 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.

Reservation Inventory Pull

Inventory ID	Blocked	Sold	Available	Travel Category	Vendor	Service Provider	Start Date
TT12345	5	1	4	Tour	Tauck Tours	Tauck Tours	11/5/2013
TT12345	5	0	5	Tour	Tauck Tours	Tauck Tours	11/5/2013

Pull from Inventory (1)
 Cancel
 Query

Travel Category: Tour Vendor: Tauck Tours Service Provider: Tauck Tours
 Inventory ID: TT12345 Description:
 Duration: 0 Start Date: 11/5/2013 End Date: 11/22/2013 Group ID: Tauck

Description: 5 Day Safari Tour Name: Luxury Rate Code:
 Pricing:

	Base	Tax	Commission	Total
Per Person Based on Double Occupancy	1,500.00	500.00	160.00	2,000.00
Single Supplement				
3rd/4th/5th Adult Supplement				
Child Rate				

Itinerary
 Blocked Sold Avail
 5 0 5
 View Inventory Record