ClientBase Windows Overview for Users

This *ClientBase* Overview is designed to provide you with a quick reference to some of the most commonly used features in *ClientBase*. This is not the ClientBase Manual. The ClientBase manual, which has been designed to provide detailed instruction for the front-line agents and the agency management and marketing teams is accessible from every ClientBase workstation via electronic help files that are updated automatically with every ClientBase release. By going to **File|Help** in *ClientBase,* and selecting *Contents, Index* or *Search*, you get answers to your questions anytime while working in the program.

In addition to our technical documentation, we offer Recorded Trainings that provides interactive training with the convenience of working on your own computer at your own pace. These are located on our website under **Training|ClientBase|Recorded Trainings** at **http://www.trams.com .**

We also offer a series of On-Line Training Courses (on our WebEx link under Training|ClientBase at **http://www.trams.com** which breaks the program down into digestible bites and provides one-hour live instruction within a small group. On-line daily Question and Answer sessions are available for interactive question/answer forums with ClientBase support personnel and other ClientBase users.

We further offer unlimited technical support by calling our team of highly trained support personnel at 310-641-8726 Option 2, or emailing a question to **Trams.CBSupport@sabre.com** .

Everyone learns in different ways and at different paces. Here at Trams and ClientBase Products and Services, 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!

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Getting to Know ClientBase

When there is work to be done in *ClientBase,* the Main Screen is the place to go - retrieve profiles, create new profiles, manage marketing activities, move information into a PNR, generate custom letters, run reports and do a whole lot more. This the *ClientBase* Main Screen:

Located on top of the main screen are the FILE MENU ITEMS (File, Edit, Reports, Merge To, Workstation Defaults, Global Defaults, Utilities, Windows, and Help). Click on the menu item, or use the Hot Keys (Alt +Underlined Letter) to get to the menu items. An arrow to the right of a menu indicates there are additional submenus for your selection. Anything that needs to be done in *ClientBase* can be done from the Main Menu. If items are *grayed out* on the File Menu Items, it is because only the administrator can use those items that set up the program.

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. Place your cursor on any of the buttons on the Tool Bar and a call-out box appears describing the function of that button.

Profile	Remind	Note	Mailer	Rescard	Inventory	Print	Label	Letter	PNR	E-mail	Glance	Go To	Delete

Create Profile

Leisure
Corporate
Vendor
Agent
Other

Create Reminder

Create Note

Create Mailer
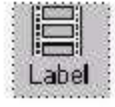
Create Res Card

Create Inventory

Print Query Results

Merge to Label

Merge to Document Template
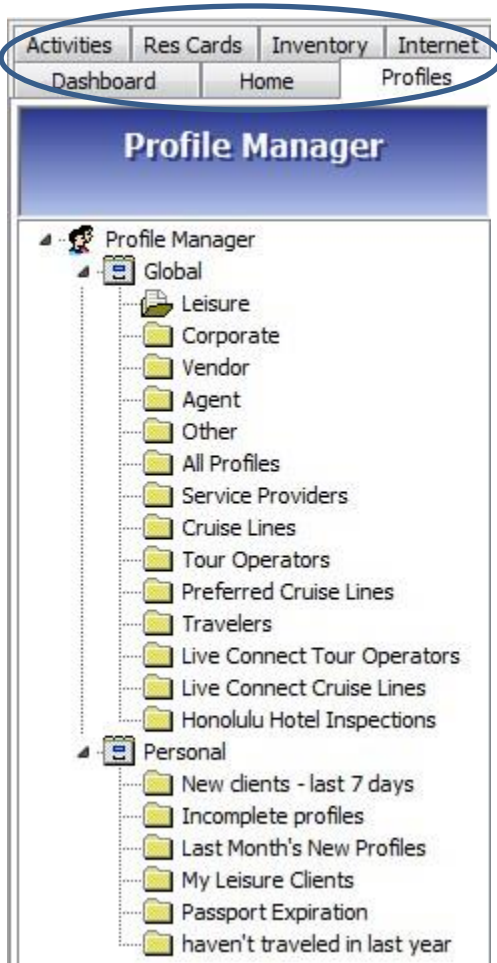
Merge to PNR

Merge to Email

**Go to Day
At A Glance**

Go to Profile

Delete

Located to the left of the main screen are the *ClientBase* **FILE MANAGERS.** Managers:

(1) The *Profile Manager* allows you to easily manage your profile data (Leisure, Corporate, Vendor, Agent and Other) and provides query filters and results listed by Profile.

(2) The *Activity Manager* allows you to easily manage your Activity data (Notes, Reminders and Mailers) and provides query filters and results listed by Activity.

(3) The *Res Card Manager* allows you to easily manage your Res Card data and provides query filters and results listed by Res Card data.

(4) *The Inventory Manager* allows you to manage your database of *Inventory* items.

(5) The *Internet Manager* allows you to launch a website right from within *ClientBase* and to setup default Global and Personal Internet "favorite" sites that can be accessed with a click of the mouse>.

(6) Use the Dashboard to view Agency Bulletins, Find a Profile, check out your To-Do List and analyze sales data reports.

(7) *Home*. Agencies configured with a specific private labeled version of CB, *Home* is where to go to access the booking site. For agencies without a specific private label, *Home* takes you to the ClientBase Marketing Services web site by default.

Query filters and column arrangements that have been saved and named as a folder. With a single mouse-click, these folders automatically complete your Query Filters and display Query Results.

Although the system comes with a default set of folders within each File Manager, these folders are completely userdefinable. Enter the desired query filters, arrange your columns as desired, then click on *File* and *Save Query As* to save as a folder within the File Manager. Folders can be saved on a Global Level, meaning the folder is available to all Users, or they can be saved on a Personal Level, which means the folder is only available for your unique User Login. To select a folder from the File Manager, click on the folder and the system automatically completes the query filters, sift through the data, and display the outcome in the Query Results Window to the right. To rename or delete a folder, right-click on the folder name.

Do simple or complex query searches based on the selected QUERY FILTERS . Depending in which of the File Managers you are working, the Query Filters vary, as do the type of results displayed. Since Activities and Res Cards are actually part of a profile record, the Profile Manager allows you to search for profiles using any profile fields as search criteria, including Activity and Res Card fields.

In the Activity Manager, search for activities using any activity fields as search criteria. The Res Card Manager as does the Inventory Manager allows you to search for Res Cards or Inventory using any Res Card or Inventory fields as search criteria.

Query Level 1

The Query 1 level allows you 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 to search for. If both fields are used in this query, then the results will match both criteria, not either/or. This means the query filters are strung together with an "and", not an "or".

For example, if you are looking for a Leisure Client named Harry Ford, then set the first field to Profile Type and select *Leisure* from drop-down menu, and set the second field to Last Name and enter "for". All Leisure Clients with the Last Name starting with "for" appear in the Query results. Double-click on the Harry Ford's entry to view his profile.

Query Level 2

The Query 2 level provides additional filters to more narrowly define your search. Search filters are selected by clicking on *Filter* and then completing as many of the search criteria fields as desired. Each field selected is strung together with an "and" which more narrowly defines the query.

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, put the following filters in your query. Enter "90045" in the *Zip Code* field; select "Cruise" under *Marketing/What Interests; "*Europe" under *Marketing/Where.* Now you have selected the filters to query your database for all leisure clients in the 90045 zip code area who expressed an interest in cruising and want to go to Europe. When you click *OK,* all clients in your database meeting the selection criteria are displayed in 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. 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.

For example, you want to mail a promotion to all of Sharon's clients who have traveled on Crystal Cruises. You select Sharon as the primary agent and Leisure as the profile type; and under the travel history tab, select *Does Have Travel History Records with following criteria* as the Filter Type, and enter Crystal Cruises in the vendor field. After clicking *OK*, and then *Refresh*, the results screen filter out all of Sharon's leisure clients who have traveled on Crystal Cruises. But you may want also to call up all of Mary's clients who have traveled on Carnival Cruises. Click *Add Filter,* select Mary as the primary agent and Leisure as the profile type; under the travel history tab, select *Does Have Travel History Records with the following criteria,* and set the vendor to Carnival. Click *OK* and then *Refresh*. Now not only do you have all of Sharon's Crystal Cruisers, but also (**OR**) Mary's Carnival Cruisers as well.

The **RESULTS SCREEN** displays the results of a 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 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 or Inventory Manager, all query results are displayed by Res Cards or Inventory entries.

For example, set the Level 1 Query Filters to Profile Type of *Leisure* and Last Name starting with "smit". The Query Results displays all Leisure clients in the database whose last name begins with "smit". To select a record appearing within the results screen, double-click on it and the profile details appear.

STATUS BAR A glance at the status bar indicates the *Login Name; Database: Memory, Date/Time; Alarms* and more.

Quick Steps to Using the Profile Manager

The *ClientBase* program defaults to the *Profile Manager* screen when opening the program. You can also access the *Profile Manager* by clicking **Windows|Profile Manager** from the Main Menu.

Step 1: Open the Profile

a. **Add** a new profile**:** Be careful not to create duplicate profiles. Look first and verify that a profile does not exist before deciding to add one. We recommend using only the first four/five/six letters of the last name when querying for a profile. To add a new profile, click the ToolBar Icon, *Profile*; **File|New**; or right mouse click in the results screen, then select the desired profile type.

b. **Delete** a profile**:** *Are you sure?* If so, highlight the profile you want to delete and click the *Delete* button on the tool bar.

Note: If the profile is attached to any invoice or payment records in *Trams Back Office*, it cannot be deleted without deleting those records first. If you are not able to delete these records, but don't want this profile to appear in the results of any query because it is a duplicate, then set the field *Status* (found in the General Information folder of the profile) to *Inactive*. This will disable the profile, excluding it from any database queries performed. If you want to delete any Activities or Res Cards in *ClientBase* and there are no payment records or invoices in *TBO* attached to the profile, delete the profile, but be aware that you also lose any record of Activities and Res Cards attached to that profile. **c. Retrieve** a profile by using Level 1, Level 2 or Level 3 Query.

Step 2: Review, Add to, or Modify the Profile

Double-click on the profile you want to retrieve to view the client's details. The Profile window organizes all the vital information pertaining to your client's needs. We designed this window to be a "dashboard" for travel professionals who need quick access to key client data. Each Leisure profile represents one household. Whether you are retrieving someone's passport number, a second address, or the cruise line last booked, this is the place to go.

BEST PROFILE PRACTICES

- For every client that calls, make sure you have a profile for that client with accurate name, address, phone and email information. *Interface ID and Salutation or some other fields may be required per your agency.* (If there is no profile create a new one.)
- Click on the *Travelers* tab, and enter any traveler with legal first, middle and last name. Birthdays, Passport information, communication entries as well as any credit card, frequent flyer card, or other cards may be updated in the Traveler tab.
- Always make sure to update the *Marketing* tab with any interests and demographics you learn about the client.

PROFILE KEY AREAS:

A client profile in *ClientBase* stores an unlimited amount of information about your customers. To organize all this information and make it easily accessible, each profile is made up of six key areas. (Toolbar, Header, Arrows, Profile Indicators, Control Buttons, and Folders).

TOOLBAR

Create a Reminder/Note/Mailer for Profile.

Create a Res Card: Click the *Res Card* icon to create a new reservation card for trips.

Create a Receipt: In cases where you are not yet ready to issue an invoice, but have received money from a client, create a Receipt.

Print: Click the *Print* icon to print out details of the profile, or a customer survey.

Merge to Label: Click the *Label* icon to create a label that can be used on a letter, brochure, passport reminder and more.

Merge to Document Template: Click the *Letter* icon to merge client name and address to any letter contained in the document templates.

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.

HEADER

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.

SCROLLING ARROW

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

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

Ok

Cancel

Apply

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.**

a. **General Info:** The General Information screen displays primary client data for this leisure/corporate profile.
b. **Communications:** See complete communication entries for all travelers in the profile.
c. **Remarks:** View any miscellaneous customer from this screen. Users may enter any free flow remarks here.
d. **Marketing:** The marketing folder provides the means to track client interests and travel preferences to provide selling agents with key information during the qualifying process of selling leisure travel.
3. **Traveler**: Organize information for each traveler. Collect details such as passport information, birth dates
and preferences such as air, car, hotel, cruise and tour preferences. Communication and all
card information entered in this area, are automatically linked to the traveler.
f.   **Activities**: This window lists all past and current Notes, Reminders, and Mailers that have been captured for this profile.
g.   **Travel History**: From this window, agents can easily review past travel purchases (invoices) either created in ClientBase or in *Trams Back Office*
h.   **Cards**: Keep track of all customer's credit cards, travel clubs, frequent flyer numbers, expiration dates, and more in a customer profile. All card information for any traveler appears in this folder. i. **Res Cards**: This tab allows you to view all customer res cards (trips).
j.   **Payment History**: View actual payment information from made in *ClientBase* or *Trams Back Office* including dates paid, amounts, check numbers, and more.
k.   **Attachment**: To enhance the 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.
l.   **PNR Entries**: A PNR Entry table is available at the Profile level so that you can format miscellaneous remarks for this client and then seamlessly paste them into a PNR.
m.   **More Fields**: If you want to track it, and *ClientBase* doesn't ask for it, here is where you can create your own customized fields of information.
n.   **Groups**: Enter a group(s) to which this customer belongs by clicking on the drop-down menu item after clicking on *Add.*
o.   **Res Card Remarks**: Enter any canned remarks you may want to print on invoices for this particular client.

Step 3) Save Any Changes and Move On

After you add/modify/delete information in any of these folders, the profile changes color from white to blue. The color blue in the window is a simple reminder that the changes you made are not permanent until you click *OK* (to save changes and leave the profile), or *Apply* (to save changes and stay in the profile).

Streamline Marketing with Point-and-Click Codes

The Marketing Tables in *ClientBase* helps you identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. Since qualifying a customer for a leisure vacation can be the toughest part of selling leisure travel, access to this valuable information might just make the difference between closing a sale or losing it. These marketing codes make it possible to consistently put the right product in front of the right client by both front-line agents and any marketing programs geared towards generating travel interest.

A master set of marketing tables appears in every client's profile under the *Marketing* folder. With a simple point-and-click with the mouse, every agent selects from the same list, and that means client consistency and agent simplicity.

> **Example:** *Greg Burdan calls in and requests some information on a trip to the Cayman Islands. He read about the great destination in his favorite Scuba Weekly magazine and figures it would be a great place for a honeymoon (may as well squeeze in some diving). By clicking on the Marketing Tab in Greg's profile, the agent easily places a checkmark in the box next to Scuba/Snorkel under the What Interests Table. Now, when your agency has a scuba or snorkeling-related itinerary to promote, rest assured that Greg will be included among the other qualified clients you are tempting with the great deal!*

Quick Steps to Using Marketing Point-and-Click Codes

Step 1) In the client profile, click the Marketing tab.
Query the client profile and double-click to enter. Click the Marketing tab to enter the Marketing tables.

Step 2) View and select Global Marketing Tables and Codes.
Use the arrows to the right of each marketing table to scroll up or down and view additional entries. Use the two black arrows located on the right margin of the screen to scroll up or down to see more than the first marketing tables. Check off any appropriate marketing item.

Step 3) Tree View Summarizes Selected Client Marketing Codes.
At a glance, match the traveler with an appropriate itinerary or marketing opportunity, by viewing the tree view summary to the left of the Marketing Tables. This tree view summarizes selected client marketing codes.

Be Prepared with Travel/Payment History

The *Travel History* tab is a read-only screen displaying a list of issued invoices (in Trams Back Office if you use that program 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.
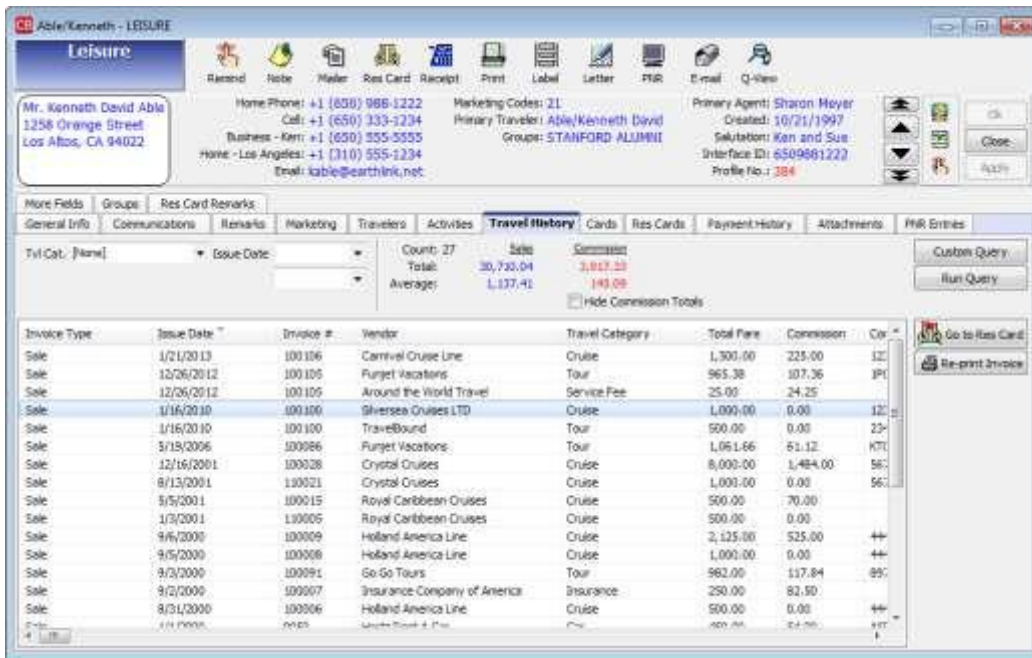
View actual payment information from an invoice created either in *Trams Back Office* or *ClientBase* including dates paid, amounts, check numbers, etc.

Agents cannot make any changes to the invoice or payment records displayed in the Travel History or Payment History tabs. The combination of travel purchase data (History folder) and travel preference data (Marketing Info. folder) gives you the ultimate capability to match your clients with offers for products they will enjoy and can afford.

Example: *Nancy Schroeder, a long-time agency customer, is coming in this afternoon to talk about the possibility of booking a cruise. She's looking for some fresh ideas on an exciting new travel experience. You quickly access her profile in ClientBase and checkout her Travel History. From here you determine if she has ever booked a cruise and, if so the cruise line, the itinerary and how much was spent. Looking at other travel categories, itineraries and vendors booked also gives you some insight on her past travel tendencies.*

Next, you review her marketing preferences and by the time Nancy make it to your desk, you feel prepared and confident in making a travel recommendation she can't refuse.

Quick Steps to View Trams Travel History

Step 1) Determine if a Customer Has Travel History.
After retrieving a customer profile, quickly determine if a customer has Travel History by looking at the indicator symbol found on top of the client profile. If Travel History exists, a *Trams* icon appears to the left of the *OK, Close and Apply* buttons.

Step 2) Click on the Travel History Icon or Tab to Open the History Folder.
By default all past Travel History is displayed in the tab, invoice by invoice, booking by booking. In addition to the listing of past purchases, Sales and Commission Totals and Averages are displayed.

Step 3) Sort and Filter Results.
The field *Sort* controls the way the query results are displayed on the screen. Sort on different fields by clicking on the down arrow located to the right of the field and selecting from the list (Issue Date, Depart Date, Travel Category, Traveler Name, Agent, Invoice #, Invoice Type, Invoice Status, and Ticket/Confirmation #). To narrow the search to a specific time period, enter a From and To date in the Issue Date fields. The arrows to the right of the fields bring up a calendar to help in your selection. Click *Run Query* to update your results. Tvl Cat. can also be used as search criteria (e.g. "show me only cruise history") by clicking on the down arrow located to the right of this field and selecting from the list. Click *Run Query* to update your results.

Step 4) Use the Custom Query.
The Custom Query screen in the Travel History folder gives you even further flexibility in locating specific travel history.

Included as search criteria are *Sort by, Vendor, Travel Category, Total Fare Range, Agent Name, Traveler Name, Depart Date Range, Client Payment Status, Vendor Payment Status, Invoice Client Name, Invoice No., Invoice Type, Invoice Status, and Issue Dates Range.*

Quick Steps to View Trams Payment History

Step 1) Click the Payment History Tab.
When you enter the Payment History tab, by default all past receipts and disbursements are displayed.

Step 2) Set Up the Selection Criteria.
Set up the Selection Criteria in the Sort, Tvl. Cat., and Issue Date fields. Click *Run Query* button to display desired query.

Step 3) Choose a Custom Query.
For more advanced queries, click on the Custom Query button and fill in selection criteria. Click *OK* to display desired query.

Strengthen Client Relationships with Activity Manager

Tired of the paper nightmare taking over your desk? So many post-it notes you can hardly find your computer? Through the use of Reminders, Notes, and Mailers, *ClientBase* makes tracking communication with your clients a paperless process. Best of all, this information can be shared among agents and used to manage the marketing activities going on in your agency.

Reminders act as "ticklers" to keep you on top of important activities like brochure follow-ups, final payments, welcome home calls, birthdays and other marketing activities. Agents create Reminders to schedule future contacts and maintain daily to-do lists.

Notes allow Agents to easily document contact your customers have with your agency such as Client Comments, Client Inquiries, or Client Questions.

Mailers act like entries in a marketing "log." They are a historical record created automatically whenever a label, document template, E-mail, or mail merge file is created for a client or group of clients.

> **Example:** *The agency's most productive agent, Sharon, works from a daily reminder and to-do list in ClientBase. From this area, she tracks and completes all of the customer marketing tasks that keep her valued clients loyal. ClientBase helps Sharon manage her schedule and "to-do" list so she is efficient at 1) Following-up and closing just about any travel lead that comes her way; 2) Managing all of the tasks involved in planning a trip, including checking on payments, documents, waitlists, seating etc.; and 3)Welcoming her customers home from their trips, as well as scheduling and managing ongoing communications with her valued customers.*

Studies have shown agents' productivity and sales increase dramatically when using an activities management system like ClientBase. Better agent productivity is an important ingredient of a happy and successful agency. Scheduling your day by making lists, following up on leads, and working in a way to finish what you start, is a gift you give yourself. This approach fosters good habits that enrich your client relationships. The Activity Manager opens the door to a greater understanding of our clients - and greater profits for agents and agencies.

The way that Sharon begins her work day each morning tells you one of the reasons that she is a productive agent. The first thing she does when she signs into ClientBase is click on the Activities tab. By default, ClientBase queries the database for Sharon's Open Reminders and the Results Screen immediately displays a list of the Reminders (or tasks) she needs to complete today.
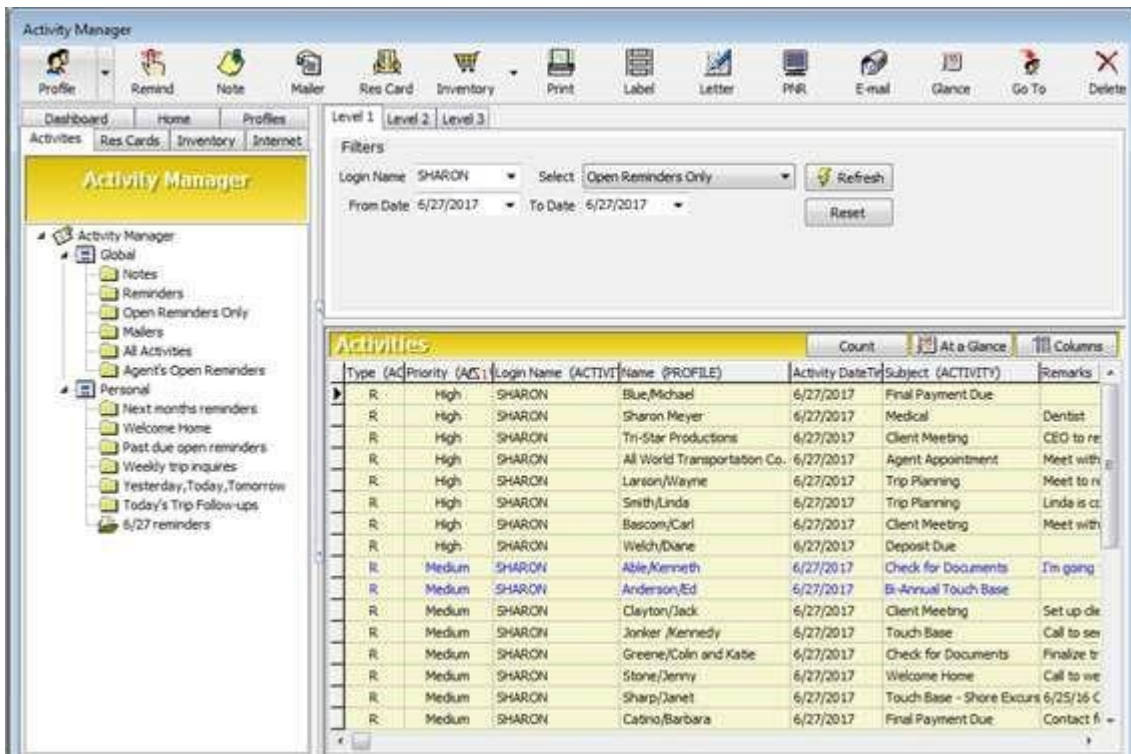
She can also click the *Glance* icon in the toolbar to see her day's schedule in a calendar format.

Quick Steps to Using the Activity Manager

Step 1) Use Reminders to Schedule New Travel Inquiry Follow-ups.

Cultivate travel interest and turn it into a sale by putting systematic follow-up routines in place. Use Reminders to remind you of these follow-up calls and any other tasks you need to do. This is easily also done by creating a new Res Card whenever a client calls about a trip by clicking Res Card on the Tool Bar from within the client's profile. Fill in the Res Cycle, Trip Name, and click Apply. Next, click the Activity Tab and create a Reminder to follow up. Put any travel notes in the Remarks area of the Reminder. Rest assured that this Reminder automatically appears on your "to-do" list on the scheduled day.

Step 2) Use Notes to Document Client Interaction.

Document when a customer calls and makes a comment or asks a question by clicking Note on the Tool Bar from within the client's profile, or from the Results Screen. Each Note includes the Date and Time the note is created, the User, a pulldown menu for the subject of the note, for example, "Client Question," a Private box that can be checked to limit access, a pull-down menu to attach the note to a reservation, and a field for free flow remarks. Any agent in the office with the security permission can view this Note by opening the profile and clicking on Activities.

Step 3) Use the Activity Manager To Review Your "To-Do" List of Follow-up Calls.

Once you have started creating Reminders to track your new trip inquiry follow-up calls, access an organized "to-do" list every day. This is obtained by opening the Activity Manager area of ClientBase. By clicking the Activity Manager tab, ClientBase automatically queries your database for any Reminders scheduled for today that have not been completed.

Start by double-clicking on the Reminder to enter. Hot-key to the attached profile by clicking Go To Profile. From the profile, access phone information, as well as other key data that adds the personal touch necessary for effective marketing. Click on the Activities tab of the profile to refresh your memory of previous contacts you've had with the client. Use the Complete Date located within the Reminder record, to identify when a Reminder has been completed and then remove it from your "to-do" list by clicking Refresh. ## Step 4) Track Other Activities with Reminders.

Once you've developed the habit of following up on travel inquires, start using Reminders to organize other marketing and administrative tasks such as Welcome Home calls, payment deadlines, document checking and more. Retrieve the profiles of your most loyal customers and schedule at least three occasions to reach out and touch them to remind them how valuable they are. Use things like birthdays, anniversaries, annual vacation times and holidays as a reason to communicate with these customers. Each time you put your agency in front of your customers, you re-enforce your relationships, reminding them you are their travel professional.

Step 5) Use At a Glance to Help Manage Your Schedule for a Particular Day, Week or Month

The Activity Manager not only provides a listing of Open Reminders, but also the ability to arrange your Reminders in an At a Glance format. Click the Glance icon on the toolbar, and the system defaults to today's schedule, listing Reminders that have been scheduled for a particular time to the left in 15 minute intervals, and the Reminders that have been set as "timeless" listed to the right under an area called To Do List.

On top retrieve a calendar for the current month that provides you with the ability to look at your schedule for any other day of the month by clicking on the day; or you can look at your schedule for any day of other months by clicking on the arrows to left and right of the month. In addition to viewing a schedule for a particular day, you can also view your schedule for an entire week or an entire month by clicking on Week at a Glance and Month at a Glance.

Step 6) Set Time/Date Alarms for Important Events

The Activity Manager area of ClientBase provides an organized list of your marketing tasks to complete for the day, but what if you need a little help remembering to complete one of these tasks at a specific time of the day?

Reminders in ClientBase come with built-in Alarms that can be set, on a Reminder-by-Reminder basis. To turn on an Alarm for a particular Reminder, place a check in the box, Alarm, and designate how many minutes prior to the time of the Reminder the Alarm should be activated. Save your Reminder and as long as the ClientBase application is open, regardless of the program in which you are currently working, an Alarm window appears on your screen at the designated time. When an Alarm is activated, a window appears that includes the details of the Reminder along with three options: **Off** (Turns off the Alarm but keeps the Reminder open and on your to-do list); **Snooze** (Reschedules the Alarm for a future time); **View** (Allows you to work the Reminder as you would from the Activity Manager).

Generate Target Client Lists with Level 2 and 3 Queries

When you need to identify a list of clients for analysis, follow-up, mailings or other promotions, run a query. Queries enable you to make the most of the data you put into *ClientBase* by providing more ways of getting the data out of the program. A query allows you to ask your database specific question(s) and the database answers with a list of clients who have the right answers. Information from different fields can be combined in one query to generate very interesting lists.

Using the Level 2 Query

The Query Level 2 provides many filters to more narrowly define your search. Search filters are selected by clicking on *Filter* and then completing as many of the search criteria fields as desired. Each field selected is strung together with an "and" more narrowly defining the query.

> ***Examples:*** *Use Level 2 Query to review all the client profiles created this month and then merge those results to a "Welcome to Our Agency Letter." Or create a personal folder of all your VIP clients where you are the primary agent, so you can access the list easily.*

Quick Steps to Using the Level 2 Query

Step 1) Click on the Level 2 Tab from the Profile Manager

Make sure that your current Manager is the Profile Manager and click on the tab, *Level 2*. Next, click *Filter* to access the screens of search criteria.
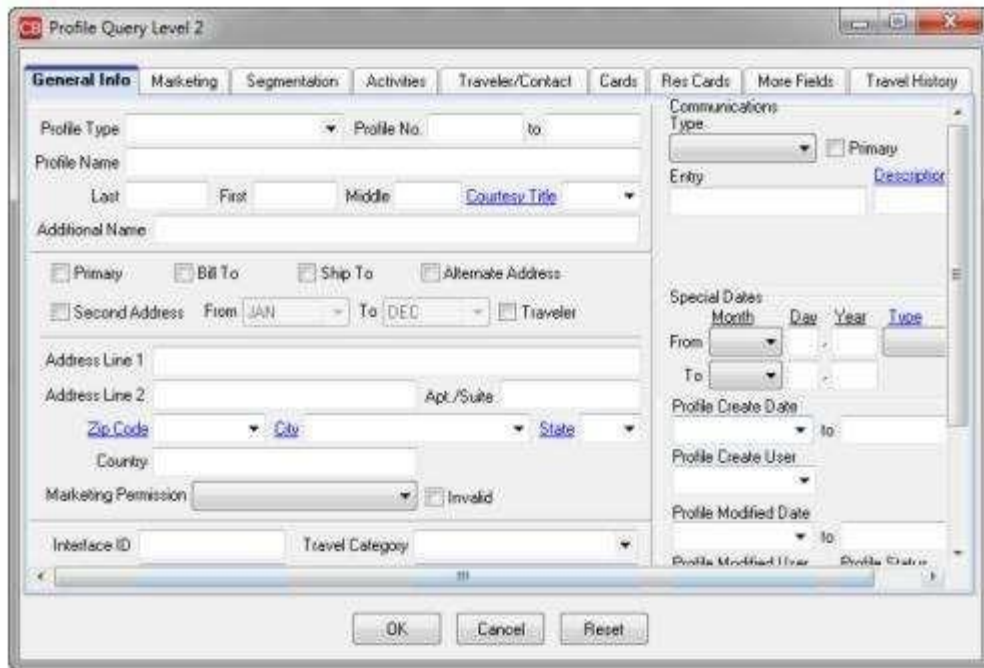
Step 2) Select Criteria for Search

The window is divided into folders - General Info, Marketing, Activities, Travelers, Cards, ResCards, MoreFields and Travel History - available for you to use as search criteria. Any combination of these fields can be used together as search criteria. To begin, select a folder that contains the field(s) to search. Then enter criteria for every field that is relevant to your search. Different combinations of fields and folders can be used. If multiple fields are used as search criteria, each field is strung to the next with an "and," meaning the results of the query only include the profiles the match all of the criteria. Each marketing table is considered a separate field, so multiple items across the tables are connected with an "and." When selecting multiple items within one marketing table as search criteria, each item is strung together with an "or," meaning the results of the query include profiles that match any of the marketing items selected within that table. Hint: Less is more when using selection criteria.

Step 3) Run the Query

Click *OK* to run the query based on the criteria you selected. Remember, if you don't get the results you want, you can always run the query a slightly different way. (A summary of all current selection criteria can be viewed in the *Filters* area of the Results Screen.)

Step 4) Review Results

The resulting profiles from the Level 2 Query window appear with a list of the profiles that match your search criteria. Above the list is a total count of those profiles that matched your criteria. Run reports on these results, save the results in a Global or Personal folder, or merge the results to Labels, Document Templates, Emails or files.

From this list modify profile information by double-clicking on the name, or by selecting the name and pressing *Enter*. Once inside a profile record, the black Up and Down arrows page you through only those profiles included in this query.

Using the Level 3 Query

The Query Level 3 provides users with an even greater ability to more narrowly define a search. Query Level 3 strings multiple statements of criteria together with an "or," using *search method options* to define how the criteria should filter. **Examples:** Use Level 3 Query to print a label for all of your customers coded as deluxe cruisers over 65 - who have zip codes in the system. Or send an E-mail to Sharon's Crystal cruisers, OR to Sharon's Carnival cruisers.

Quick Steps to Using the Level 3 Query

Step 1) Click on the Level 3 Tab from the Profile Manager

Make sure that your current Manager is the Profile Manager and click the *Level 3* tab. Click *Reset All* if any filters exist to create a fresh query. Next, click *Add Filter* to access the screens of search criteria.
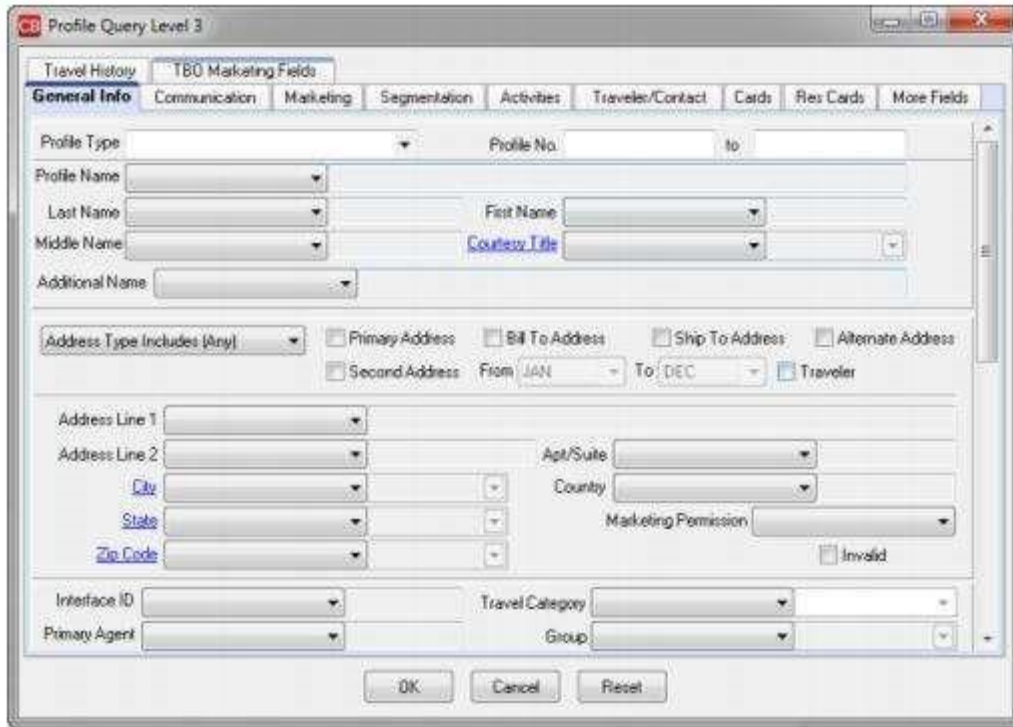
Step 2) Select Filters with Criteria for Search

The window is divided into the multiple folders available to use as search criteria. Any combination of these fields can be used together as search criteria. To begin, select a folder that contains the field(s) you wish to search. Then enter criteria for every field that is relevant to your search after using one of the *search method options* to define how the criteria should filter.

Search Method Options or operators include: *Is Equal To, Is Equal to Any, Is Not Equal to Any, Less than or Equal to, Greater than or Equal to, Less than, Greater than, NOT Equal to, Starts with, Contains, NOT Contains, Is BLANK,* and *Is NOT BLANK.* Different combinations of fields and folders can be used. If multiple fields are used as search criteria, each field is strung to the next with an "and," meaning the results of the query only include the profiles the match all of the criteria. Each marketing table is considered a separate field, so multiple items across the tables are connected with

an

"and." When selecting multiple items within one marketing table as search criteria, each item is strung together with an "or," meaning the results of the query include profiles that match any of the marketing items selected within that table. A filter named *Filter Type* for Communication, Activities, Family/Employee, Cards, Res Cards and Travel History tabs render the queries even more user friendly and flexible:

Blank Filter Type - By default a new query will have this Filter Type blank, which means the query will 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 will be 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 will return only profiles that have any kind of Travel History.

If you enter further search criteria in this tab, then each criteria will be strung together with an "and" and the system will look for at least 1 record that meets all the criteria (in the example of Travel History it will look for at least one invoice that meets all the criteria) and if at least 1 record is found then the profile with that record will be 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 will be 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.

Add as many filters as are needed. Each filter is connected with an "or". (Click *Modify* to edit a filter, *Delete* to remove a

filter*, Reset All* to delete multiple filters.)

Click *Refresh* to run the query based on the filters you selected. Remember, if you don't get the results you want, you can always run the query a slightly different way. Click *Summarize* to see a listing of all selected filters.

Step 4) Review Results

The resulting profiles from the Level 3 Query window appear with a list of the profiles that match your search criteria filters. Above the list is a total count of those profiles that matched your criteria. Run reports on these results, save the results in a Global or Personal folder, or merge the results to Labels, Document Templates, E-mails or files. From this list you can modify profile information by double-clicking on the name or by selecting the name and pressing enter. Once inside a profile record, the black up and down arrows page you through only those profiles included in this query.

Save Query Folders with Date Formulas for Future Use

Queries run in the File Managers can become quite complex. With this in mind, if there are certain queries that you want to run often, we suggest you save query filters. That way, the next time you want to run a query that you have already setup, all you need to do is click on the folder you have saved it to.

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.

> **Example:** *Sharon wants to see how many new trip inquiries she created this month so far. Since she creates a new Res Card for each new trip inquiry, first she clicks the Res Card Manager, Level 2 Query, and then Filter. She enters a date formula for the current month in the Create Date To/From fields and clicks OK. After rearranging the columns and sorting the query to her liking, she saves the query as a Personal folder entitled, This Month's New Trip Inquiries. At any time during any month, when she clicks the saved folder, she views how many new Res Cards have been created so far that month.*

Quick Steps to Save Query Folders with Date Formulas for Future Use

Step 1) Setup Query for the Desired Profile/s

Using any of your File Managers, query your database to locate the desired profile/s using Level 1, 2, or 3 Query.

Step 2) Use Date Formulas if Applicable

The following table contain sample formulas for specifying dates. You can 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.

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

Three months from now =0,+3,0

Six months ago: =0,-6,0

One year from now =0,0,+1

Process the Query by clicking *OK.*

A week from last Monday =Mon-1

Next Monday =Mon+1

Step 3) Customize the Look of the Query Results Screen Including Sort

On the Results Screen, click *Columns* to pick and choose columns you want included in the query. By using the up and down arrows, put the columns in any order you want them to appear on your Results Screen. Click *Sort by Columns* to select up to three columns to sort the results of the query in ascending or descending order. If you prefer to customize the query from the Results Screen, use your mouse to move columns where you want, and hold down <Shift> while clicking on a column heading to sort in ascending order, or click once again to sort in descending order.

Step 4) Save the Query

Click **File|Save Column As** to save the customized query. Folders can be saved on a Global Level, meaning the folder is available to all Users, or they can be saved on a Personal Level, which means the folder is only available for your unique User Login. Name the folder and click *OK* to save. To select a folder from the File Manager, simply click on the folder and the system will automatically complete the query filters, sift through the data, and display the outcome in the Query Results window to the right. To replace an existing saved folder with a new one, to rename or delete a folder, right click on the folder name.

Run Labels for Quick, Effective Marketing

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 Profile, Activity, and Res Card Manager queries. *ClientBase* queries provide 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.

> **Example:** *Your Princess DSM offers to cover postage for 250 brochures for a highend itinerary, if you can provide the labels this week. Can you do it? With ClientBase, your labels will be printing before you can say, YES! Query your database for your Deluxe Cruisers and voila, the labels are ready.*

Quick Steps to Print Labels

Step 1) Query Database for Desired Profile/s

Labels have to be set up first before you use them! This labels are set up under Global Defaults. Using any of your File Managers, query your database to locate the profile/s for which you would like to generate a label. Click *Label* on the toolbar within a profile or from the query results screen, or click **File|Merge To|Label**. If selected from the query results screen, the system gives you choices on what specific results you want included: *Current Results, *Selected Results, or *Re-query.

If you choose *Current Results*, then the system includes all of the profiles currently appearing in your query results screen. If you choose *Selected Results,* the system includes only those profiles that have been selected, or highlighted in your current query result screen. (Pick and choose specific profiles by highlighting the profiles you want to include. Do this by holding down the Ctrl key and clicking on the desired profiles.) If you choose *Re-query,* the system will take you to the Level 2 query screen for your current manager so that you can requery the desired results.

Once you have identified the appropriate results to include, click *OK* and preview the labels on your screen.

Step 2) Review Label Setup

At the top of the label preview screen is a tool bar. The Tool Bar includes powerful icons for viewing and customizing your printed labels. The first 5 icon buttons are for zooming in and out of the preview. The next 4 icons are for paging through the labels. The next icon is the print setup, followed by the actual print icon button.

The next icon is the Label Setup button. Click here to review or modify your current label setup. From this area, you can select one of several default label settings. The five tabs at the bottom are for even greater customizing of the label design for this one mailing only (the master remains intact).

- 1. Sheet Properties: Default label layout and dimensions.
- 2. Label Properties: Default size of the label and number of copies.
- 3. Text Properties: Font selection, color, style and size.
- 4. Options: Special features such as zip code barcode, use of upper case and printing labels for the primary or other address in a profile.
- 5. Start Position: Easily select the position to start printing on a page of labels.

Step 3) Create a "Marketing Log" by Creating a Mailer for Each Profile Included

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 the fact that you have mailed something to your client. When you click *Print,* you are prompted to create a *Mailer.* Also from the Print Preview screen, you can click *Create Mailers* to automatically create a Mailer record for every customer included in your results. *ALWAYS CREATE A MAILER!* Whether it's 1 result or 500 results, an individual Mailer record is attached to each profile for historical purposes. The Mailers are viewed from within the client profile by clicking on the *Activities* tab and can also be queried and printed from the Activities Manager by Date or Subject.

Step 4) Print Labels

From the label preview screen, a *Print Setup* button is available for selecting the desired printer settings and a *Print* button is available for printing your labels.

Print Custom Letters Easily with Document Templates

Sending personalized letters frequently helps build stronger relationships with clients. That's something *ClientBase* does best. Document templates that come with the program and have been customized for your agency make it easy to print personalized letters to clients. Your own custom agency templates to the database have created a central "library" of documents that any agent can access. The speed and ease of this feature gives agents reason to be more pro-active in their communication with their customers.

> **Example:** *In less than two minutes, an agent can print a custom "Welcome Home" letter to send to a client returning from a cruise. Another example: Once a week you query for all new customers to the agency, using profile Create Date as search criteria. From the results of the query, you can instantaneously merge all client information into a "Welcome to the Agency" letter and in seconds have all of the letters personalized and printed.*

Quick Steps to Print Custom Letters

Step 1) Query Database for the Desired Profile/s

Document Templates need to be set up before you use them! This can be done under Global Defaults. Using any of your File Managers, query your database to locate the profile/s to receive a letter. Click *Letter* for the Tool Bar within a profile or from your query results screen, or click **File|Merge to|Document Templates.** If selected from the query results screen, the system gives you specific choices on the results to be included -*Current Results, *Selected Results, and *Re-query.

If you choose *Current Results*, the system includes all of the profiles currently appearing in your query results screen. If you choose *Selected Results,* the system includes only those profiles that have been selected, or highlighted in your current query result screen. (Pick and choose specific profiles by highlighting the profiles you want to include and holding down the Ctrl key and clicking on the desired profiles). If you choose *Requery,* the system takes you to the Level 2 query screen for your current manager so that you can requery the desired results.

Step 2) Select a Template (the letter you want to print)

Just above the area where you select what records to include is a field called Document Template. A drop-down list of template choices appears here for selection. Browse the different templates and see a preview before you make your selection. There's even a blank template if you want to write your own letter. This list of templates is shared with all the agents using the system.

Step 3) Make Any Necessary Changes

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 on the *Template* tab, make your changes and 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 tool-bar 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 a button called Insert Field that allows you to place the contents of other profile fields into the Template. Go ahead and play with these settings if you like, but when you are done, click *Update Document*.

Step 4) Create a "Marketing Log" by Creating a Mailer for Each Profile

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 the fact that you have mailed something to your client. When you click *Print,* you will be asked if you want to create a *Mailer.* Also from the Print Preview screen, you can click *Create Mailers* to automatically create a Mailer record for every customer included in your results. Whether it's 1 result or 500 results, an individual Mailer record is attached to each profile for historical purposes. The Mailers are viewed from within the client profile by clicking on the *Activities* tab and can also be queried and printed from the Activities Manager by Date or Subject.

Step 5) Print Document/s

If you would like to alter your printer settings, click on the Print Setup button, capture your desired printer settings and click *OK.* When you are ready to print, click on the Printer button to print the Document/s.

Important Note: Create emails that are used over and over again too. These can be accessed when sending out an individual or a blast email to clients.

Save Time & Duplication with Merge to PNR

No more multiple entries or databases! *ClientBase* provides your agents with the ability to move customer information (maintained in the *ClientBase* profile) to your reservation system's PNR. This feature works with Amadeus, Apollo, Sabre, and Worldspan. Sit back and watch your database grow and watch yourself become more efficient by using your marketing database to build PNRs. 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 it as their source for building PNRs. Also, watch your customer loyalty grow as agents access customer information when building PNRs for your leisure clients, rather than repeatedly asking them for the same information.

> **Example:** *Ken Able calls your agency to book some flights to Paris. Your agent, Susan, first locates Ken's profile in your marketing database (ClientBase) and verifies current address and phone information. Once confirmed, she clicks the Merge to PNR button and within moments has the PNR started with all of Ken's necessary information.*

Quick Steps to Merging a Profile into a PNR

Step 1) Retrieve the Customer Profile

Use the Level 1 Query in the Profile Manager to retrieve your desired customer profile. Verify address and phone information is current.

Step 2) Click the Merge to PNR Button

Click *PNR* located on the profile toolbar.

Step 3) Select the Information to Include

Place a check mark next to each item of information you would like to include in your current PNR. Click *Next* when items are selected.

Step 4) Review Formatted Entries and Finish

Review the information formatted for your GDS. Make any edits, and click *Finish* to transfer the data to your current PNR.

Step 5) Toggle to Your GDS to Display Your PNR

Use Alt-Tab keys, or your Windows Task-Bar, to go back to your GDS and display your current record. All customer information sent from *ClientBase* is displayed in a "live" PNR.

Email Blast – 21st Century Communication

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 using the *ClientBase* E-mail "blast" which allows you to send one E-mail to any number of profiles at the same time.

> **Example:** *Your agency has just received a hot, new, Bermuda cruise special at a great price. You need to notify all your deluxe cruisers as soon as possible so that they can*

take advantage of this terrific deal. Your agent, Michael, first locates all the deluxe cruisers in your database by using the Level 2 Query in ClientBase. He checks the results and clicks on the Merge to E-mail button on the toolbar. He types the details of the cruise into the Email (or he can use a Document Template he has created for the mailing). He clicks on the "Send All" button, and within minutes, each deluxe cruiser is notified of the upcoming sailing.

Quick Steps to Email Blast

Step 1) Set up your E-mail option as MAPI or SMTP

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 Text Protocol). **MAPI** requires use with compatible E-mail programs such as Microsoft Outlook, Microsoft Express, Netscape and Eudora. E-mails sent with this option do not have text formatting capabilities, although you can send Document Templates. The **SMTP** option offers 2 benefits: It does not require a MAPI compatible E-mail program for the Merge to E-mail feature in *ClientBase* to work, and with this option, you can format your text, even use HTML, as well as use Document Templates within your E-mail messages. The option for using either MAPI or SMTP as your method for sending E-mails is located within each User Login, but can be overwritten at the Workstation level*.*

Step 2) Retrieve the Desired Customer Profiles

Use the Level 1, 2, or 3 Query in the Profile Manager to retrieve your desired customer profiles. Verify the profiles you have queried are correct in the Results Screen, and that the profile E-mail addresses are valid. Only the E-mail entry flagged *Primary* is used with the Merge to E-mail feature.

Step 3) Click the Merge to E-mail Button

Click on the E-mail button located on the Toolbar of the Profile Manager or click **File|Merge To|E-mail**.

Step 4) Type the E-mail Message and Send to All Selected Profiles

For the **MAPI** option, type the E-mail message you are sending to all selected profiles, or choose the appropriate Document Template. Click *Mailer* to create a mailer for each person you are E-mailing to, and then on the "Send All" button to send completed E-mails to all selected profiles.

For the **SMTP** option complete these fields:

Priority: Select a Priority label from the drop down menu of Highest, High, Normal, Low and Lowest.

Mode: Allows you to select how you want to format the body of your message. Your choices include:

Formatted Text: This allows you to free flow your message by typing the text and using the toolbar to format it as desired. Please note if hyperlinks are included within your message, highlight the line and click the Hyperlink button on the tool bar to format it properly.

Document Templates: This allows you to complete your message by using any of your Global Document Templates. Use **Load Doc Template** to select from a listing of your global templates or use the **Insert Fields** to insert merge fields in combination with free flow text.

Raw HTML: This allows you to paste RAW HTML into the body of your message. ClientBase does not come with an HTML Editor so you either need to use a tool such as *Front Page* or *Dreamweaver* to create your HTML, or you can right click on any HTML page and copy the contents to clipboard and then paste into the RAW HTML tab.

Plain Text: Enter your E-mail message without any formatting. This message can then be viewed by E-mail recipients, regardless of their E-mail service.

Preview is available for all E-mail modes and allows you to preview your message in its formatted state before sending. Keep in mind that whether the recipient is able to view the HTML is dependent on the E-mail service used by the recipient. If HTML cannot be viewed by any of the recipients, then for just those recipients the message will be rendered to plain text.

Note: Want to test the e-mail you are sending? For SMTP, click *SMTP Settings,* and click *Test.* To keep a history of any e-mails, be sure to create a mailer record. These mailers create a history within each profile whenever an e-mail is sent.

Understand Your Database with Reporting

Computer systems can only report on the data you enter into the system. The Reports Menu in *ClientBase* provides you with a "bird's eye view" of your database to measure whether the collected data is meaningful. Use reports to plan your marketing activities, maintain quality control, and train agents to enter the information you need to meet your goals.

Example: Your agency has been using *ClientBase* for several months. You want to get an idea of the "niches" of your leisure customers, so you can plan your marketing strategy. You perform a Level 1 Query in the Profile Manager and select all leisure clients. Then click on **Reports|Profile Reports|Statistics|Marketing Stats** to get a report on the Marketing Categories and Codes of your leisure clients. The Statistics report uncovers a niche of scuba divers. Armed with this insight, you put together a fantastic scuba package and begin marketing to these clients.

Quick Steps to ClientBase Reporting

Step 1) Retrieve the Profiles, Activities, Inventory Items, or Res Cards for Reporting Purposes
Use the Level 1, 2 or 3 Query in the Profile, Activity, Inventory, and Res Card Managers to retrieve the desired list of profiles, activities or res cards. Verify results in the Results Screen.

Step 2) Click the Report Menu
Click on Reports in the File Menu and choose from Profile, Activity, Inventory, or Res Cards Reports. The system gives you specific choices on the results to be included - *Current Results, *Selected Results, and *Requery.

*If you choose *Current Results*, the system includes all of the profiles currently appearing in your query results screen. If you choose *Selected Results,* the system includes only those profiles that have been selected, or highlighted in your current query result screen. (Pick and choose specific profiles by highlighting the profiles you want to include and holding down the Ctrl key and clicking on the desired profiles). If you choose *Requery,* the system takes you to the Level 2 query screen for your current manager so that you can requery the desired results.

Step 3) Select the Report and Run
After clicking the report you want to run, the results appear for printing in a preview screen. Choose the appropriate printer and number of copies in the *Printer Setup,* and then click *Print.*

Hint: The *Current Query Results* report prints out whatever is in the Results Screen (what you see is what you get). Click *Columns* to pick and choose columns you want included in the report. By using the up and down arrows, put the columns in any order you want them to appear on report. Click *Sort by Columns* to select up to three columns to sort the results of the query in ascending or descending order. If you prefer to customize the query from the Results Screen, use your mouse to move columns where you want, and hold down <Shift> while clicking on a column heading to sort in ascending order, or click once again to sort in descending order.

There are dozens of extra ClientBase reports on our website. Click on the Trams Crystal Report link when you see it to find directions on how to use these reports.

Manage the Trip Planning Process with Res Cards

The Res Card feature in *ClientBase* provides a perfect tool to integrate all processes in trip planning. By setting up a Res Card, an agent can document the client's first call by creating a new 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 captures details of reservations and prints 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 are created to remind an agent of a final payment date or a document confirmation. When the customer returns home, the agent documents 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 are 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.

Each Res Card represents one trip; therefore, customers are likely to have multiple Res Cards in their profiles at any one time. Depending on your agency's needs, enter as much or as little trip information on each Res Card as desired. When talking with your 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.

> *Example: Michael Blue inquires about Deluxe Crystal Sailings to the Bahamas. Instead of documenting all contacts about this trip manually on paper, our agent, Sharon, starts a Bahamas Res Card for Michael in ClientBase. Every time Sharon has contact with Michael or any vendors/suppliers about this trip, she calls up Michael's Bahamas Res Card and adds information to it. She adds Reminders for first deposit, final deposit, to check for documents, and to welcome home. These reminders show up in her daily To-Do List. At any point she prints out an itinerary, generates an invoice or trip statement for Michael, or tracks his uninvoiced balance due.*

Quick Steps to Automate Res Cards

Step 1) Start a Res Card with Each and Every New Trip Inquiry
Use the Level 1 Query in the Profile Manager to retrieve your desired customer profile. Verify address and phone information is current. Click *Res Card* on the Toolbar and fill in *Reservation Cycle, Trip Name and Travelers* to start the tracking trip details. Click *Apply* and in the *Activities Tab,* enter a Reminder to schedule a follow-up.

Step 2) Enter Reservation Details When Learned
As the trip progresses and vendors are on the phone with confirmation numbers, rooming details, or any other trip detail, query up the Res Card under the Res Card tab in the Client Profile, or in the Res Card Manager, and modify the Res Card.

> **Live Connect:** Click on this button to access participating on-line booking engines (see section below).

> **Inventory:** Click on this button to access inventory items available with all details for use (see section below).

Step 3) Organize and Schedule Administrative Tasks
Once any reservations have been booked, use *Batch Reminders* to schedule and organize all the administrative tasks you need to do such as checking deposit, final payment, waitlists and documents. Under the Activities Tab, or at top of the res card, click *Batch Reminders* to select and launch appropriate new reminders all at once. These reminders can be viewed either in the actual Res Card, or in the Activities Tab in the Profile.

Step 4) Generate Invoices, Itineraries or Trip Statements As Needed
At any point in the trip planning process, generate client quotes, itineraries, invoices, or trip statements as needed. These documents can be customized with an agency header or footer. Any invoice generated in *ClientBase* automatically enters *Trams Back Office*, as these two programs share the same database.

Use a Reminder to schedule a Welcome Home Letter and Welcome Home Call. While talking with your customer, capture feedback in the Client Feedback tab. Toggle into the customer profile to enter any new customer details, such as newly learned travel preferences or other personal information. Enter any pertinent details about the vendor or service provider into their profiles as well, so other agents can benefit from what you learn.

Hint: Don't forget to use the "Cut and Paste" feature in *Windows* to save time during the entry process. Highlight text in the Res Card, copy it, then paste it into the Client, Vendor, or Service Provider profile if desired.

Quick Steps to Create Res Cards/Invoices

These are suggested steps 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 email. 3) Click the *Traveler* tab and review traveler list. Add any missing travelers by entering the First/Last Name 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. 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 in the Service Provider area 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.) Want to totally break out pricing line by line? Use the *Itemize* area.

9) From main screen, continue entering reservations for each new vendor.

10) Apply to save all Res Card changes. Click the *Generate Invoice* icon on toolbar at top of screen.

11) 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* area at top of generate invoice screen for one FOP. If split forms of payments or multiple forms of payments are used, click the reservation and use the *Booking Payment* button.

12) 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*.

13) 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. The invoice is now permanently available in the *Invoices* tab of the Res Card for reprint/e-mail at any time.

Using Live Connect

One of the most innovative features in *ClientBase* is Live Connect 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*.)
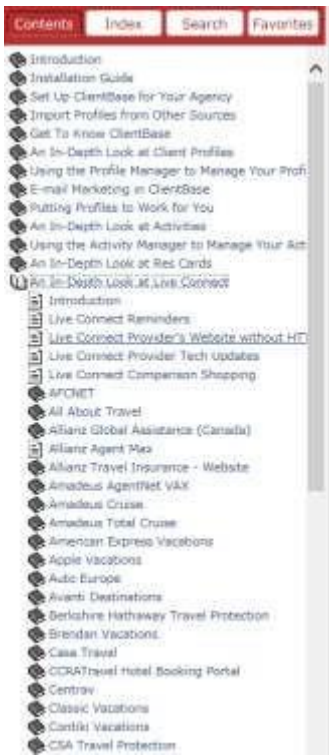
Currently ClientBase has over 60 Live Connect Providers available for use, but continues to add more on-line booking engines all the time. (Please refer to the help files inside the program, or manual for a current list of Live Connect Providers.)

Example: Ken Able calls to book a Las Vegas getaway on his credit card. Agent Mary creates a new Res Card and uses Live Connect to book the trip. After booking on-line, she pulls the booking details back into the Res Card. She prints out Ken's itinerary, and generates his invoice which automatically lands in Trams Back Office.

Quick Steps to Using Live Connect

Prior to using Live Connect in *ClientBase,* the System Database Administrator needs to do Live Connect set up.

Step 1) Start a Res Card

When ready to book on-line, create a client's Res Card (after double-checking address/communication, credit card and traveler information). Fill in the *Agent, Branch, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers.

Step 2) Click on the Reservation Tab, and then Add

If you do not know what vendor you are using, use the *Live Connect* button at the Res Card level. If you know the vendor, fill in the *Travel Category* and *Vendor* fields and then click on the *Live Connect* button at the reservation level.

Step 3) Select the Live Connect Provider

Select the Live Connect Provider you are using to book this reservation from the drop-down menu by *Connect To* and then click on *Create New Reservations.*

Step 4) Select Customer Data You Need to Book the Reservation and Click Connect

Presented with a profile data screen, check information in this screen to be passed to the booking engine. If no screen appears, then the information can be viewed in the upper gray part of the *ClientBase* window that the booking engine runs in, so that you can more easily re-key it into the booking engine if necessary.

Step 5) Complete the Reservation & Import Data into ClientBase

Complete the reservations using instructions supplied to you by the booking engine when you registered. Make sure you receive a confirmation number ensuring the reservations have been completed and click on *Import Reservation.*

Step 6) Generate Itineraries and Invoices

All reservation data booked online is now located in the reservation fields in ClientBase for you to generate itineraries and invoices, and print reports.

If you do not start the reservation in ClientBase, but know the confirmation number, click *Import Reservation* when Live Connect is launched.

Using Inventory in ClientBase

In ClientBase you can use inventory items for block space that have been created, and integrate them into the reservation area of res cards. The process is an easy one. Block space inventory records are first created for air, cruise, hotel, rail, tour, and miscellaneous reservations. Each inventory item is entered one time, with details of the pricing, itinerary, deposit and payment due dates, as well as invoice/itinerary remarks. An agent creates a reservation and pulls from the list of created inventory records. All *Inventory Details* automatically drop into this reservation and create a link to the inventory record; therefore tracking what inventory has been taken and what is left for sale. 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.

> *Example: Agent Michael creates a res card reservation and clicks Inventory to query for inventory that was created for block space for an Ensenada cruise. After locating the item he wants to use, he clicks Pull from Inventory, and inventory information automatically falls into the*

reservation portion of a Res Card, which also links to update what inventory items are remaining for sale.

Quick Steps to Using Inventory

Prior to using Inventory in *ClientBase,* the inventory items need to be created.

Step 1) Start a Res Card and Reservation

When ready to book a trip, create a client's Res Card (after double-checking address and communication information), and fill in the *Agent, Status, Reservation Cycle,* and *Trip Name* fields and select the travelers. Create a reservation and fill in *Travel Category.*

Step 2) Click on Inventory to Query/View Inventory item/s you want to sell

A Level 2 Inventory Query screen appears to query your database of inventory based upon the travel needs of the client. 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. Enter the criteria you know about your client's trip needs and click *OK* to view a listing of the Inventory that matches your search criteria.

A one-line listing of each *Inventory Detail* that matches your criteria appears at the top of your screen, with a visual display of the Inventory Detail currently highlighted at the bottom of the screen. Use the arrow key, or the mouse to highlight the desired Inventory Detail and view the data stored within that Inventory Detail, including what's been Blocked, Sold and Available. To view more information about that Inventory Detail, click *View Inventory Record* at the bottom right hand corner.

Step 3) Pull From Inventory

If you have located the desired Inventory and take one of the Available Seats/Cabins/Rooms, click *Pull from Inventory* button, and the system returns you to the reservation record with all the inventory fields defaulting in your reservation fields. This simultaneously links the reservation to the Inventory Detail, therefore allowing your agency to track what's been taken or *Sold*, and therefore what's now *Available*. Any reservation that is linked to inventory displays the *Inventory ID* and the *Quantity* taken in the upper right hand corner of the reservation record. 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.

Step 4) Proceed with Generating Itinerary and/or Invoice