

ClientBase Windows Overview for Database Administrators

This ClientBase Overview is designed to provide the database administrator with a quick reference to setting up some of the most commonly used features in ClientBase. Usually an Implementation Specialist calls and sets up an appointment with you to set up the program for use by your agents. If you need assistance, please email Trams.implementation@sabre.com.

This is not the ClientBase Manual. The ClientBase manual, which has been designed to provide detailed instruction for the database administrator, 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.

You may want to print out the section, entitled *Setting Up ClientBase for Your Agency*, located in the electronic manual located inside the ClientBase help files tab, *CONTENTS*.

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 at 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 (provided you have signed up for this service), 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.

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ClientBase Setup Check List



Here's a checklist for the order to set up your program for use. Get help with items 1 and 2.

- ___ 1) Install Program. (For an appointment ...New? Email Trams.Implementation@sabre.com; Older customer? Email Trams.Techdesk@sabre.com .
- ___ 2) Import Profiles if needed. Do not attempt to do this without guidance. Email Trams.CBSupport@sabre.com for an appointment.
- ___ 3) Set Up Branch info.
- ___ 4) Set Up Agent Profiles and link to branch.
- ___ 5) Set Up Group Security Level defaults.
- ___ 6) Set Up User Logins.
- ___ 7) Learn how to Backup/Restore.
- ___ 8) Globally Change Capitalization Using Case Converter and Set Up Case Converter.
- ___ 9) Set Up PNR Settings, Entries & Rules for Use with Merge to PNR.
- ___ 10) Set Up Unique Headers/Footers for Invoices/Doc Templates/Reports ___ 11) Set Up to Invoice, Send Trip Proposals/Itineraries and Trip Statements.
- ___ 12) Set Up Batch Reminders.
- ___ 13) Set Up Live Connect.
- ___ 14) Set Up Required Fields.
- ___ 15) Set Up Marketing Codes.
- ___ 16) Set Up Email with MAPI or SMTP.

Use these directions to maintain your database:

- ___ 1) Profile Dupe Checker.
- ___ 2) Global Modify.
- ___ 3) Merge to File or File Handoff.
- ___ 5) Train and Motivate Front-line Agents on ClientBase.

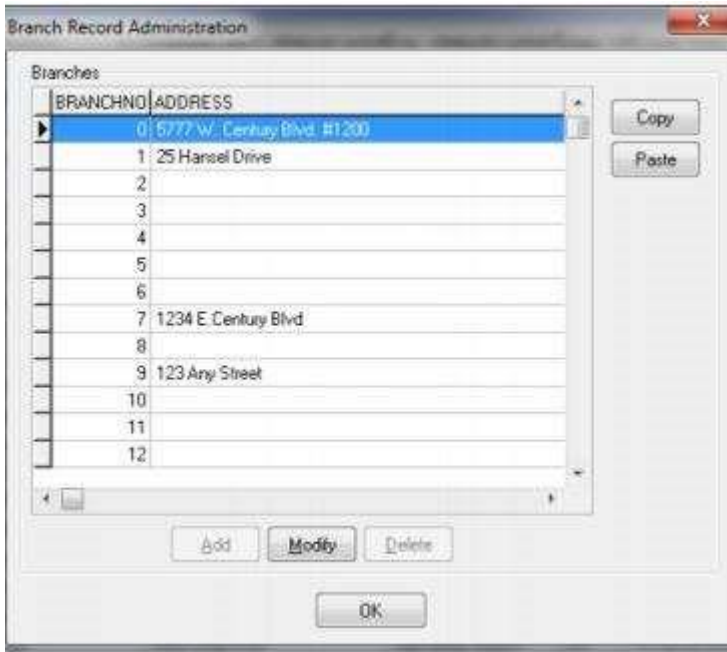
Set Up Branch and Control Agent Access

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

When *ClientBase* is initially installed, this SYSDBA Login comes with the default password of *what was sent you in your startup email*. It is highly recommended that the agency administrator change the password from *default* to a password that only he/she will know, so others cannot modify the system. Only the SYSDBA user can update the security database to add, modify or delete users or groups of user's configurations.

Example: Sharon, your leisure manager, should have full access to the database, including the ability to read, write or delete information. The Advanced Security Level window allows you to grant permissions on all the different menu options and designate read/write/delete abilities. Jenny, on the other hand, is a new agent and should just have the ability to view and use information but have no access to setup and maintenance features.

Quick Steps to Set Up Branch and Control Agent Access



Both the User Name and Password entries are cap sensitive. The only user login that provides access to the User List is the SYSDBA (System's Database Administrator) login.

Step 1) Log In to ClientBase.

Login into ClientBase with SYSDBA/Password sent to Agency Owner in the start-up *email*.

Step 2) Set up Branch.

Go to **Utilities|Branch** and double-click on 0 Branch which is the default. Fill in Agency information.

Step 3) Create agent profiles.

Create a ClientBase agent profile and link it to the branch. All you need to start is full agent name in *Agent Name* field and *Branch*.

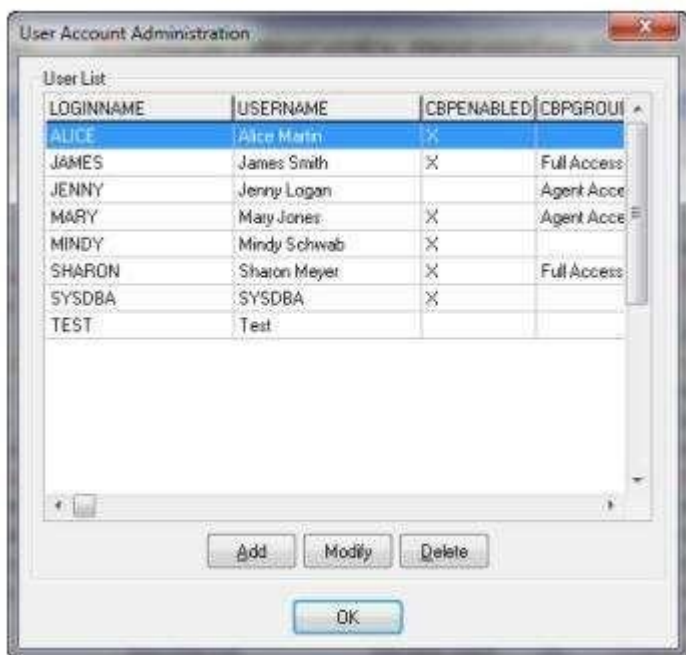
Step 4) Edit or Add to the Group Security Levels.

You will be linking users to a Group Security Level. If you change any permission in this area, any user login associated with that security level, will automatically be updated.

Go to **Utilities|User Logins|Group Security Level**. Modify any default (although the defaults – *Agent Access*; *Full Access*; or *Read Only Access* are fairly defined. Click on *Add* and enter a new Group Security Level. Complete each of the 7 tabs to establish the default permissions for this particular security level.



Step 5) Add Agent Logins.



Go to **Utilities|User List**. Click on *Add*.

Add: Click *Add* to add a new user. A *User Setting* dialog box is displayed. Enter the name of the new user and a password. Verify the password. Add additional agent information. Under *Agent Profile*, enter a few letters of the agent name, then select the agent profile from the pull-down menu. If the agent profile does not appear in the pull-down list, then create an agent profile and return. Select the authorization and security level.

Modify: Use the *Modify* button to change the settings of an existing user login.

Delete: Remove or disable a user from the login list.

Select Security Level: On the pull-down menu for Security Level, select the name of the Security Group level for which you have pre-set default permissions or select the *Advanced* tab to set unique permissions for this user yourself.

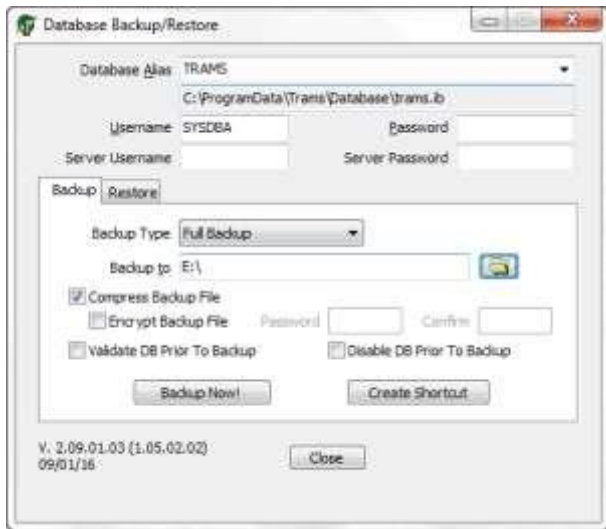
Step 6) Advanced Security Level

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

- **Menu Options:** Allows the SYSDBA to further restrict permissions to selected menu items within the database. For example, you may not want to grant a new user the ability to change the global default settings. In that case, you would uncheck the box next to Global Defaults. Now the user cannot access the Global Default menu option. If you want to give an agent access to all global default settings except Marketing Codes, then the Global Defaults box would remain checked but the Marketing Codes box would be left unchecked. Every menu option available in ClientBase is listed here for you to enable or disable for each agent.
- **Profile Tabs:** Each profile type is made up of several folders, or tabs of information. To provide you with the utmost flexibility, each tab for each type of profile can either be enabled or disabled for each User. Click on the down arrow and remove the check from any tab of information you do not want this agent to view.
- **Other Restrictions:** By placing a check in front of any of these items, a user is prevented from accessing that area of the database.

Ensure the Integrity of Your Database with Backup/Restore

Saving your data files at the end of each day's work is absolutely vital! If you do not, you run the risk of losing data - one of your agency's most precious assets. Even though PC hardware has become more reliable, and ClientBase makes every effort to protect the integrity of the system against mechanical failures and user errors, no system is 100% failure-proof. Since ClientBase shares a database with Trams Back Office, when you backup ClientBase, you backup Trams Back Office as well!



Example: Mary, the agency manager, takes a ClientBase backup every day on a flash drive. She can do this while others are using the program. She alternates flash drives (using one disk for Monday, Wednesday, and Friday; and one for Tuesday, Thursday, and Saturday). On Fridays, Mary makes an extra backup and takes it home. This way if anything happens to the agency backup, she has an extra backup. (She could also use a CD or back up to another computer on the network, alternating location each day.)

In the event there is a power surge or your hard disks crashes, you may need to restore your backup data. Reminder that ClientBase and Trams Back Office share the same database.

Example: Mary experienced a power surge that prevents her from connecting to the database. It is Thursday, and she forgot to make a backup on Wednesday. She has the backup from Tuesday and wants to restore ClientBase data. If she does this, she loses all invoices, payments, etc. that were interfaced or entered into Trams Back Office on Wednesday.

Quick Steps to Backup

[Step 1\) Go to Start|Programs|Trams|Backup/Restore.](#)

Use our utility to perform backup! Other users do not have to be out of the program. When you backup ClientBase, you also backup Trams Back Office! **Important:** Use our backup utility to do backup. It verifies the integrity of the files before placing the backup on the medium.

[Step 2\) Set Up the Backup Utility](#)

From the backup utility, select the *Alias* of the backup database. The *Database Path* listed below the *Alias* is where your data currently resides. *Backup To* defines the drive, directory, and name of the backup file you are creating. *Backup To* files can be sent a flash drive or some other external drive. If something happens to the computer, you have backed up to a different location.

[Step 3\) Run Backup.](#)

To begin the backup, click on *Backup Now*. You receive a message, "Database Backup in Progress" indicating that a backup file is being created. ClientBase automatically checks your files to make sure the data is in good shape. Note that this check commences any time the backup is invoked and only modified files are checked for errors.

[Step 4\) Setup Backup with a Desktop Icon.](#)

To retain these settings each time you want to do a backup, click *Create Shortcut*. This creates a shortcut on your desktop that you can double click on each time you want to do backup.

Quick Steps to Restore

[Step 1: Go to Start|Programs|Trams|Backup/Restore.](#)

In the event there is a power surge or your hard disks crashes, you may need to restore your backup data. Select the *Restore Tab*. The Restore function lets you recover backup data saved on disks using the Trams Backup function. Restore replaces your current data files with those on your backup diskette(s). This restore program restores both Trams Back Office and ClientBase data. Since the two programs share a common database, you cannot restore one without the other.

IMPORTANT: Everyone must be out of ClientBase and Trams Back Office when restored in performed.

Step 2) Setup Restore.

Choose the correct Database Alias; type the Password for SYSDBA; find the location of the file to be restored; and finally click on the *Restore Now!* button to begin the restore process.

Quick Steps to Set Up Scheduled Backup

Step 1) Go to Start|Programs|Backup/Restore, enter settings, and create shortcut.

Under the Profile Tab, enter settings as outlined above. Setup Click Create Shortcut.

Step 2) Edit Target Line by right mouse clicking the short cut you have just created on your desktop.

Left Click Properties and place your cursor at the end of the target. Add "space" -auto (Press space bar; do not type the word space and then type -auto). Highlight Target line & press <CTRL> C to copy, and Click OK.

Step 3) Schedule the Backup by click on Start|Programs|Accessories|System Tools|Schedule

Task.

Click *Add Schedule Task*. Follow the Wizard by clicking Next, and then Browse. Change Look in to "Desktop", and Select Backup Trams, and click Open, and Next.

Step 4) Select how often you want the backup to run.

Selecting Start Time, When task is performed and Start Day.

Step 5) Enter the login for your Computer.

Make sure your password is correct and leave blank if there is no password. Be sure to check in the box next to Open Advanced Properties for this task when you click Finish.

Step 6) Click in the Run box, and press <CTRL> V to paste the target line from the short cut in the box.

Click OK.

Step 7) You're ready to do a scheduled backup.

Make sure your backup disk is in the drive, and make sure your computer is on when the backup is scheduled.

Quick Steps to Test Your Backup

It is a good idea to periodically backup your Trams database using the Trams Backup/Restore utility, and restore it to a different alias to clean up any index issues in the database. The indexes over time can cause slowness in the performance. The restore cleans the indexes by regenerating them. This process checks the integrity of your database.

Never restore Trams.ib until you have restored the backup someplace else. If you have any difficulties whatsoever, immediately call support at 310-641-8726!

Step 1) Go to Start|Programs|Trams|Alias Utility.

Create an alias named Backup and type: C:\ProgramData\Trams\Database\backup.ib. Do not test as there is no database until the restore has been completed.

Step 2) Restore the last backup to the Backup Alias (it creates the new backup.ib when it does this).

Step 3) Log into ClientBase as this Alias, Backup, and make sure all was restored correctly.

If you can look at the details of one profile, the backup is healthy.

Globally Change Capitalization Using Case Converter

You know how your agents like to enter data using solid capital letters or no capital letters. It makes data entry faster for them. But unfortunately, if you want to use these same entries to merge to a letter, invoice or an email template, they won't be formatted properly. The Case Converter takes the results of a current query and automatically converts the case for selected fields. It changes the first letter of each word as a capital and the remaining letters to lower case.

After you have performed a Case Converter, you can set up ClientBase to automatically change the cases while agents are typing in ClientBase profiles.

***Example:** Cruise Travel agency which had been using Trams Back Office for many years, just installed ClientBase. Many of the profiles in the database were created with solid capital letters. Tom, the agency manager, queries up all profiles in the database and sets up the Case Converter. He specifies what fields he wants converted, and when he finishes, the first letter of each word is capitalized and the remaining letters are set to lower case.*

Quick Steps to Use Case Converter

Step 1) Query up the profiles you want to case convert.

Use the Profile Manager to query the profiles you would like to run the case converter on before running this utility.

Step 2) Click on Utilities|Case Convert to access the utility.



Make your selections:

- **Conversion Type:** This determines how you would like the case converter utility to change the case of the selected fields. Select either *Upper Case First Letter of Each Word*, *Upper Case all Letters*, or *Lower Case all Letters*.
- **Fields to Convert:** Place a check into each field you would like the system to convert, including Profile, Address and Passenger fields.
- **Include Records:** Allows you to determine what profiles should be converted. Select either *Current Results* or *Select Results*. (You must query up the profiles you would like case converted before running this utility.)

Step 3) Click Global Convert Now to run the case conversion utility.

Records Modified displays the number of records affected by the conversion.

Step 4) Go to Global Defaults|Profile Defaults|Auto-Case Converter Settings|Profile Tab.

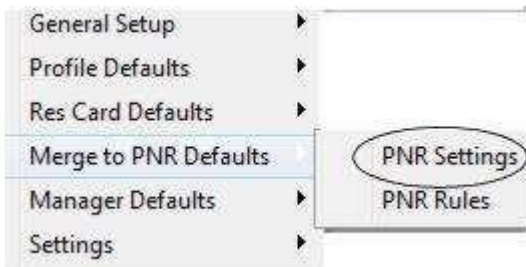
- Once you have performed the *Global Case Converter*, you need to set the Auto-Case Converter. By placing a check into *First Name*, *Last Name*, or *Courtesy Title*, as you are working within your ClientBase profiles, the first letter of each word entered will be automatically capitalized and the remaining letters will be automatically set to lower case.
- Click the Address Tab - By placing a check into *Address Line 1*, *Address Line 2*, *Apt/Suite*, *City*, or *Country*, as you are working within your ClientBase profiles, the first letter of each word entered will be automatically capitalized and the remaining letters will be automatically set to lower case.
- Click the Passenger Tab - By placing a check into *First Name*, *Last Name*, *Courtesy Title*, or *Relationship/Position*, as you are working within your ClientBase profiles, the first letter of each word entered will be automatically capitalized and the remaining letters will be automatically set to lower case.

Set Up PNR Settings, Entries & Rules for Use with Merge to PNR

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 Apollo, Sabre, Amadeus and Worldspan. In addition to your client profile fields, ClientBase includes four PNR entry tables--at the branch level, at the agent level, at the profile level and at the passenger level. This means you have complete flexibility on the amount of information you would like automatically formatted for a PNR while working in a ClientBase profile. But before agents can use this feature, you need to set up the PNR settings, PNR entry tables, and if you want to send data other than the default entries (Bill To Address, Ship To Address, Interface ID, Phone Numbers, Credit Cards, Frequent Flyer Numbers), you need to set up PNR Rules as well. A Rule is simply a way of designating how certain fields of information captured in a profile should be formatted when sent to a PNR.

Example: Manager, Jan Jones, wants agents to start using the Merge to PNR feature to grow her agency marketing database. She knows this is the best way to add new profiles and update existing ones with Address, Phone & Email information since customer info is sent to the PNR from ClientBase each time a client books a trip. Jan first sets up the PNR Settings and then creates new ClientBase rules for customer preferences.

Quick Steps for Selecting PNR Settings



[Step 1\) Go to Global Defaults|Merge to PNR Defaults|Merge to PNR Settings.](#)

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

[Step 2\) Most of the appropriate settings have been defaulted. Just click OK to accept.](#)

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

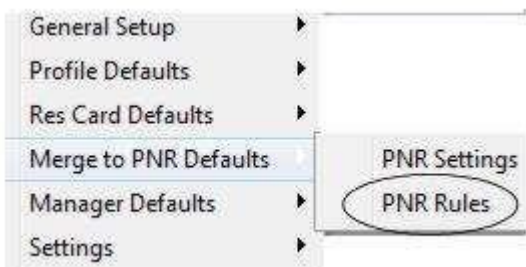
[Step 3\) Test Using Merge to PNR and adjust Rules Accordingly.](#)

The first step in using the Merge to PNR feature is to locate the profile you want to merge with your GDS from the Profile Manager. When merging information into your GDS, you have several choices. Merge the information to PNR from the Query results screen by entering the profile folder. From within the profile, make sure you have entered accurate Address/Phone/Email/Passenger and any Card information and access the toolbar CRS/PNR icon to start the move to PNR. (The first time you do a Merge to PNR, change the Reservation System to yours. It'll save this next time you come in.) After you have clicked on the Merge to PNR icon in the toolbar, notice a series of check boxes in the PNR builder selection screen.

Select the information you want to move to a PNR. In the Passenger Entries column, these should appear in alphabetical order any passengers that were created for leisure clients. If you want to change the order in the PNR, however, simply use your mouse to drag the passenger into the desired position in the column. Check off any additional entries you want to move to the PNR and click Send. (By clicking Preview, you are taken into a PNR preview screen which you can edit.) If after Merging to the PNR, you see any entries that do not look correct, tailor the PNR Rules.

If you do a Merge to PNR and find that the data is not merging correctly, you can tailor the default PNR Rules.

Quick Steps for Tailoring PNR Rules



[Step 1\) Go to Global Defaults|Merge to PNR Defaults|Merge to PNR Rules to Review the Default CRS Rules:](#)

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

[Step 2\) Click Add to add an Additional Rule, and fill in the following fields.](#)

Practically any information stored within a ClientBase profile can be formatted for your CRS and included when using the Merge to PNR feature. To include additional information, in addition to the six areas addressed in the default rules, select the appropriate Reservation System and click on the Add button. Do the following to set up new rule:

- **Description of Rule:** Enter a brief description of the type of information you will be including in this rule. This description appears on the PNR Selection Screen when using the Merge to PNR feature.
- **Field Groups:** Select the type of profile data you want to format for your CRS PNR's. Click the arrow located to the right of this field to select from a drop-down list of choices. Each field group includes a designated list of profile fields available for use within a PNR Rule. These profile fields appear in the *Available Fields* area when the Field Group is selected.
- **Always Move This Rule:** When checked, this field sets the rule to always move this entry into a PNR. When left unchecked, the entry is optional.
- **Display on Selection Screen:** The PNR Selection Screen is the screen that appears when you use the Merge to PNR feature and allows you to select the specific profile data to be included and sent to the PNR. It is advisable to review the results of each rule on the PNR Selection Screen
- **PNR Custom Rules:** Use the combination of free flow text, special characters, and merge fields from the list of available fields to create a Custom Rule.
- **Handling Blank Merge Fields:** When setting up Rules in ClientBase, you may choose to include Merge Fields that aren't always completed in every profile. These fields include Courtesy Title, Apt/Suite, or Company Name. If the field is completed, you want it included, but if it's not, you don't want to include the formatting with a blank space.

To handle this, the PNR Rules allow you to use the left and right brackets [] to surround a set of characters within a rule, and designate that if the merge field within those brackets is blank, then don't include any of the characters between the brackets. Here's an example: The brackets around [5/ <<Company Name>>§] suggest that if this is an Leisure Profile so the Company Name Merge Field is blank, then don't include the 5/ or end item formatting either.

Need more help with this? Call support at 310-641-8726 or email Trams.GDSDesk@sabre.com to ask your questions.

Quick Steps for Creating PNR Entries

ClientBase comes with PNR entry tables at the Branch, Agent, Profile and Passenger Level. These tables give you the opportunity to capture any PNR entries or remarks you would like included when sending data to a PNR.

[Step 1\) Go to Branch PNR Tab, Profile PNR Tab, Family Member/Employee PNR Tab, or Agent PNR Tab.](#)

In order to capture profile, passenger or agent-related PNR entries (such as general remarks, special meal requests, air/car/ hotel preference, UDID's, department, etc.), a tab is included at the profile level and at the family member/employee level. Use the Add, Modify, and Delete buttons to maintain specific PNR entries for each passenger. There are no limits to the number of PNR entries captured in this table.

[Step 2\) Click Add and fill in the following fields:](#)

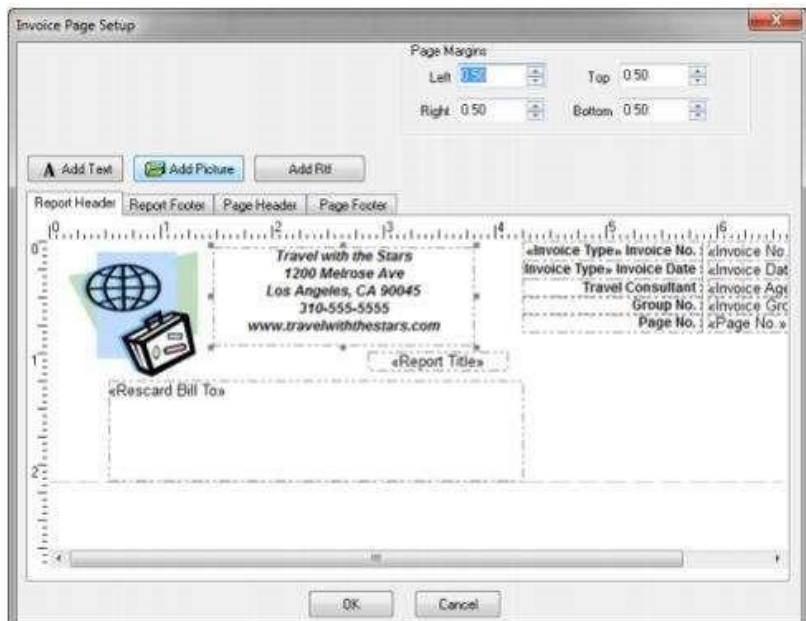
- **CRS:** Choose your CRS system from the drop-down menu.
- **Description of Entry:** Enter a free-flow "Description" field.
- **Always Move this Entry:** By checking this box, the entry always moves when you do a move to CRS. If this box is not checked, you'll have a choice of moving the entry whenever you want.
- **Assign Name Field Position:** When checked, automatically attaches the passenger's name position at the end of the PNR entry (e.g. 3SSRVGML-1.2).
- **Display on Selection Screen:** When checked, automatically displays this entry on the selection screen when using the Merge to PNR feature.
- **PNR Entry:** Enter the PNR entry the way you would in your reservation system. Click OK to save. ClientBase Overview for Administrators

Set Up Headers/Footers for Invoices, Document Templates and Reports

Agencies want to send invoices, documents, and reports with their own customized headers and footers that include company logo, address and company motto. Setting up the Header/Footer under Global Defaults creates a global header/footer.

Example: Rainbow Travel wants to set up its own logo, address and company motto in headers for use with Invoices, Document Templates, and Reports. The ClientBase database administrator goes to Global Defaults|General Setup|Headers/Footers|Invoices and sets up global headers and footers which can be used when invoicing. When he is done, he repeats the process for Document Templates, Reports and any other document he needs a header/ footer on.

Quick Steps to Set Up Headers/Footers for Invoices, Doc Templates & Reports



Because branch merge fields are available, agencies with multiple branches may either setup headers/footers globally with branch merge fields or at the branch level under Utilities|Branch|Invoice Page Setup. When running an invoice the system looks at the branch settings first, and if nothing is in there, prints out the global default header/footer. Logos can be also added at the user level (agent) for use on trip docs. Refer to the ClientBase help files under the topic, *How to Set Up User Level Logos in Headers/Footers* for more details.

Step 1) Go to Global Defaults|General Setup|Headers and Footers|Invoices.

Select either the Report Header, Report Footer, Page Header or Page Footer tab. The report header is the header on the first page of the report, the report footer is the footer on the last page in the report. The page header is for each page of the

report, and the page footer is for each page of the report. If you have a Report Header/Footer and Page Header/Footer all setup, each prints on each of the pages you designate.

- **On All Pages:** Appears on all pages regardless of the number of pages. If *Report Headers/Footers* exist, the *Page Header* appears just below the *Report Header*, and the *Page Footer* appears just above the *Report Footer*.
- **On First Page Only:** Appears on just the first page, or if a single page document appears on that single page. If *Report Headers/Footers* exist, the *Page Header* appears just below the *Report Header* and the *Page Footer* appears just above the *Report Footer* on Page 1.
- **Skip First Page:** Appears only starting with Page 2 of the document. If it's a single page document then it does not appear.

Step 2) Add Text or RTF.

Add Text: Use *Add Text* to insert text into the header or footer. A text box appears in the upper left corner. To type and format text, double-click the text box. A screen appears to enter your desired text, align the text, and set the font. Click *OK* to go back to the main screen. Highlight the text box to click and drag the text box and position it. Click and drag the text box to size it properly.

When you add an rtf box, you are able to do more text formatting. Notice the formatting toolbar for your use. You may also add merge fields.

Step 3) Add Picture File.

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

Step 4) Save the Modifications and Continue to Set Up.

Now click on the *Footer Tab* and begin to set this up repeating Step Two and Three above. Save.

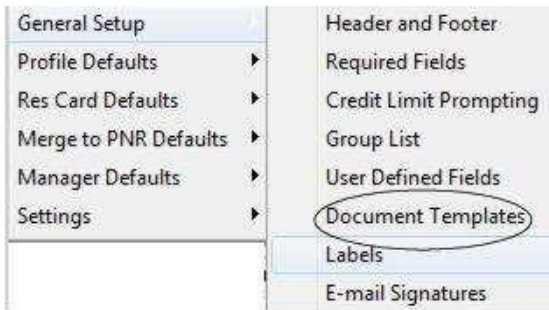
Step 5) Go to Global Defaults|General Setup|Headers and Footers to set up a unique header and/or footer for any other document.

Set Up Document Templates & Label Settings for Agent Use

ClientBase includes the ability to produce and customize form letters or emails (Document Templates) or labels and then easily merge those letters or labels within a profile or from the results of a Profile Manager query. ClientBase comes with sample letters in the program that need to be customized for use. Unlimited document templates and email templates can be added as needed.

Example: Manager, Jan Jones, wants to customize the document templates that agents will be using to send correspondence to customers (such as a Passport Expiration letter, or a Brochure Cover Letter) or for use with blast email. Next, Jan create label defaults for agent use.

Quick Steps to Set Up Document Templates



[Step 1\) Go to Global Defaults|General Setup| Document Templates and Modify, Delete or Add to the Default Templates that are available for use.](#)

Retrieve the document template by clicking on **File|Template|Load**, and load the template from within the *Template Editor*. From the list of templates displayed, select the desired template from the dropdown menu to modify and click **OK**. (If you don't want to use this template, click **File|Delete**.)

[Step 2\) Customize Document Template for Use by Agents.](#)

Once the template has been loaded, make changes to both the text and the merge fields. Merge fields are the fields in the document surrounded by chevrons, such as <<ProfSalutation>>. When the document template is selected from within a profile or from the results of a profile query, this merge field is replaced with the entry included in the salutation field of the profile. To remove merge fields, highlight them and press the *Delete* key on your keyboard. To insert new merge fields, place your cursor in the desired location and click *Insert Field*. A list of the various profile fields available for selection is displayed. Click on the field to insert into your template.

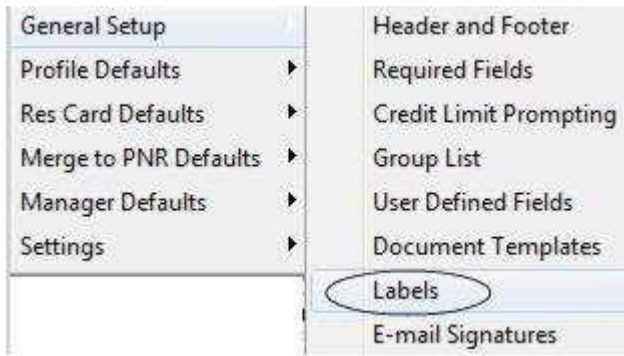
- **Margin Modification:** To modify page settings in the document template, click **File|Page Setup** to select paper size, orientation, and customize margins.
- **Include Global Header/Footer:** If you have already created a unique global header and/or footer using the Quick Steps above, by default, this area is checked off. To load a unique header/footer for this document, click *Header and Footer*. Follow the directions in the Quick Steps above to create a customized Header and/or Footer. By default once a document is launched, the system looks in the document template first for a header/footer and if none is found, uses the global document header/footer.

[Step 3\) Click OK to save, load the next template and proceed to modify.](#)

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

Create email templates too for use with ClientBase. (**Tip:** Save starting with the file name of Email and then file name so all the email templates appear in one area under Email when you select for use.)

Quick Steps to Setting Up Labels



Step 1) Go to Global Defaults|General Setup|Labels and Set Up the Default Label.

By choosing from the drop-down menu, choose an Avery label default. Click *File/Save As*, and name the label file. You cannot delete the default label settings in ClientBase, and by renaming it for your use, you can create as many different type of labels as you want.

Step 2) Customize Sheet, Label, Text and Option Properties.

When you click on a label, default fields and layout appears for modification. Also, a series of default label properties appears at the bottom of this screen. These too can be modified or used to format a custom label.

- **Sheet Properties:** Select the label layout and dimensions. By clicking the Default Label driver, these are automatically set up for you.
- **Label Properties:** Size of the label. By clicking on the Default Label driver, these are automatically set up for you. *Quick Steps to Set Up Document Templates*
- **Text Properties:** Customize the font selection, color, style and size of the label.
- **Options:** Special features such as zip code barcode, use of upper case, and printing labels for the primary or other address in a profile.
- **Start Position:** This area is really used to easily select the position to start printing on a page of labels by the user.

Step 3) Click Save, load the next label, name it, and proceed to modify.

You may want to set up different labels to accommodate different mailings. For example, if you are mailing something to the traveler/employee rather than the profile name, you need to set up a label with fields that reflect the traveler/employee name. When completed, click **OK** to save all.

Set Up Invoices, Trip Proposals, Itineraries & Trip Statements

When agents use the Res Card feature in ClientBase, they can produce invoices, itineraries and trip statements, while tracking invoiced and uninvoiced balances. 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. Before generating an invoice in ClientBase, some setup is required.

Example: *Travel with the Stars has three branches and wants to start generating trip proposals, invoices, itineraries, and trip statements out of ClientBase. Helen, the manager, goes into the branch setup screens, assigns unique branch invoice numbers and sets up invoice/trip statement/trip proposal/itinerary canned remarks & formats. She then goes to Global Defaults to continue setting up. Now each branch is ready to generate trip proposals, invoices, itineraries, and trip statements!*

Quick Steps to Set Up Res Card Documents

Step 1) Go to Utilities|Branch to set up Invoice #'s.

ClientBase can have its own separate sequence of branch invoice/refund numbers for use when generating invoices for the Res Card. Enter the starting Invoice Number and the system will automatically assign the next sequential invoice number each time an invoice is generated. Since *Trams Back Office* does not allow duplicate invoice numbers, be sure to start a series of numbers not currently in use in *Trams Back Office*.

Step 2) Setup Trip Proposal, Itinerary, Invoice and Trip Statement Canned Remarks for each Branch by going to Utilities|Branch.

The Trip Proposal/Itin/Invoice/Trip Proposal Remarks are tables providing you with the ability to capture multiple remarks then select them as desired for printing upon invoicing. Use the Add, Modify and Delete buttons to create multiple Remarks for use when launching the trip docs. Each Remark captured includes a Description, Free Flow Remarks (no character limit) and a check box for "Always Print".

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

Step 3) Set Up Global Defaults|Defaults Field Values for New Invoices

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

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

You can also set Default Field Values for new invoices:

- **Form of Payment:** Set to default to either Cash, Check, Credit Card, CC Merchant or No Default. If the default Form of *Payment* is set to Credit Card or CC Merchant, the system automatically defaults the credit card number to the first credit card entry within the profile being invoiced.
- **Trip Balance Due Date:** Set to default to either the *Earliest Reservation Final Payment Due Date*, or leave blank for no default.
- **Travel Category Defaults:** Set a default *Travel Type* for each reservation *Travel Category*.
- **Travel Type Defaults:** Set a default *Submit To* setting for each *Travel Type* as well as a default setting for *Show as Paid when Invoiced as Comm Track*. (Use this for each travel type if you want a comm track amount paid by credit card to appear in invoice totals printed for the customer.)

Tip for Non-Trams Back Office Users: By setting these up as Supplier except Hotel and Cars (Commission Track), agents will not have to change these fields each time they create an invoice.

Step 4) Set Up Tax and Commission Invoice Defaults by going to Global Defaults|Res Card Tax and Commission Defaults.

For non-TBO users, designate which taxes go to which tax fields when invoicing from ClientBase. If desired, for each tax field, specify the two-letter tax Identifiers of the taxes. If you have more than one Tax ID, separate them by a comma. The commission rate for vendors used in reservations is defaulting to the vendor commission field in the vendor profile. If the vendor default commission is blank in the vendor profile, then the commission defaults to the amount entered in the field called Comm Rate.

Helpful hint: Set all to 0, if you want to enter taxes and commissions on an invoice-by-invoice basis (most agencies do).

[Step 5\) Set up Default Field Values for ResCards/ResCard More Field Categories/ResCard Insurance Prompting and ResCard Service Fee going to Global Defaults|Res Card Defaults.](#)

Note: You may consider revisiting this area, as most of the defaults will probably work for you to get started.

DEFAULT FIELD VALUES FOR RES CARDS allow for customization of some of your Res Cards and Reservation defaults.

RES CARD LEVEL:

- **Reservation Cycle:** Set to default to any of User Definable drop-down options.
- **Default All Family Members for Leisure Profiles:** Check here if you want all Family Members to automatically be displayed as passengers when you create a new Res Card.
- **Default Tab Displayed:** Select the tab you want to default when entering the Res Card - *Reservations, Invoices, Activities, Agent Remarks, Client Feedback, Attachments, More Fields, or Edit History.*

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

RESERVATION LEVEL:

- **Booking Status:** Select Confirmed, Quoted, or Cancelled from the drop-down menu.
- **Travel Category:** Select Air, Hotel, Car, Cruise, Insurance, Miscellaneous, Rail, Tour, Service Provider, or Transportation from the drop-down menu.
- **Host Code:** If you are using the IC/Host Utility to export invoices to a Host agency, set a default Host Code that automatically populates whenever adding a new Reservation. The Host Code currently defaults blank, but click the drop-down and select a default Host Code from the list. (Host Codes are created under Global Defaults|Host Codes.)
- **Filter Vendor Profiles for Travel Category Selected:** If you have associated Vendor profiles with a Travel Category in the General Information tab of the Vendor profiles, check here to display only those vendor profiles of that particular Travel Category for selection off the dropdown menu.
- **Filter Service Provider Profiles for Travel Category Selected:** If you have associated Service Provider profiles with a Travel Category in the General Information tab of the Service Provider profiles, check here to display only those Service Provider profiles of that particular Travel Category for selection off the drop-down menu.
- **Default Service Provider Name to Vendor Name:** If you do not want the Vendor name to automatically drop into the Service Provider name field in a reservation, uncheck this option.
- **Reservations Imported from PNR Default to Invoiced Outside of CB+:** If you do not want the Invoiced Outside of CB+ to be automatically checked off when you do a PNR import, uncheck this option.
- **Automatically Launch Live Connect for Live Connect Vendors:** If you do not want Live Connect vendors to be automatically launched when creating a reservation, uncheck this area.
- **Print Address on Itin/Invoice for Hotel/Car/Insurance/Miscellaneous/Tour/Transportation:** Check or uncheck options for printing addresses on the itinerary/invoice for Hotel, Car, Insurance, Miscellaneous, Tour, or, Transportation.
- **Print Cruise Itin Option:** Select the default Cruise Itinerary Option from drop-down, Sort by Date/List Arrive then Depart or Do Not Sort by Date/List Arrive then Depart.
- **Print Itemization Option:** Choose the following from the drop-down for printing itemization details, Print All Itemization Details, Summarize by Passenger, Summarize by Category/Passenger, Summarize by Description/ Passenger, or Do not Print Itemization

RES CARD MORE FIELDS are used for capturing any type of trip data that the Res Card currently is not prompting for, giving you the ultimate flexibility in tracking trip information. Res Card More Fields can be linked to a Trams Back Office UDID (User Defined Interface Data) field too, so upon invoicing in ClientBase, the more field entry automatically populates the appropriate TBO UDID field. When setting up the Res Card More Fields, you have the ability to link a Profile More Field to a Res Card More Field which means upon creating a new Res Card, the Res Card More Field automatically is completed with the entry in the profile more field. This means if certain client data is being captured in a profile more field and being merged into a PNR via the PNR rules for the purpose of completing a TBO UDID, you can invoice from ClientBase and automatically complete that data into any new Res Cards, and upon invoicing complete the TBO UDID with no extra steps.

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

- Go to More Field Categories to assign a field name by going to **Global Defaults|ResCard More Field Categories**, and complete the following fields:
 - **Category Name:** Enter a descriptive name.

- **Profile More Field Link:** Link this Res Card More Field to a Profile More Field for automatic completion when creating a new Res Card, by selecting profile more field from the drop-down menu. This field can be left blank, and only works if you currently have profile More Fields created.
- **UDID No.:** To link a specific UDID (User Defined Interface Data) from Trams Back Office to a Res Card More Field so that upon invoicing, a Res Card the value in the Res Card More Field automatically populates the value in the TBO UDID, select from the drop-down menu. When the reservation is invoiced, the UDID fields in TBO are populated and appear on TBO invoices/reports, although they do not appear on invoices generated in ClientBase. This field can be left blank.
- Go to User-Defined Fields|More Field Items|Res Card More Field Items and use *Add, Modify, and Delete* to setup the drop-down list of defaults by completing the following fields:
 - **Category Name:** Select the desired Res Card More Field category name by selecting from the drop-down menu. This listing was created when you created the more field categories above.
 - **Item Value:** Type in the desired Item Value. Click OK.

RES CARD INSURANCE PROMPTING if activated looks at the time of generating an Invoice or Itinerary for any Reservation, Service Provider or Itemization record with a travel category of Insurance to determine if the prompt should appear or not. Insurance Waiver prompting is established under Global Defaults. If none exists, the system prompts with a message: **"No Insurance Reservations Exist for this trip. Accept or Decline Insurance."** Declining insurance then includes an agency- defined waiver message for printing at the bottom of the Invoice or Itinerary.

- **Turn on Insurance Waiver Prompt for Invoices:** Check to activate this prompt.
- **Turn on Insurance Waiver Prompt for Itins:** Check to activate this prompt.
- **Default Insurance Vendor:** If desired, select a default insurance Vendor from your drop down list of Vendor profiles for defaulting new Insurance Reservations.
- **Default Insurance Waiver Message:** If insurance is Declined, a customized Waiver message can be printed on the Invoice/Itin. Type your waiver message into this free flow text area. This message will appear at the bottom of each Invoice/Itin (underneath any Branch Remarks).

RES CARD SERVICE FEE: Create a vendor profile for your agency and set the default commission to the desired amount (usually 100%). Type in the default vendor (your agency name) and service fee amount and click *OK*. When agents click the Service Fee button in res card, it launches this setting as a reservation.

Set Up Live Connect

Save time and improve efficiency by transmitting selected client information to a booking engine online. 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.)

Example: Benjamin Primm wants to set up Live Connect for his agents to use with ClientBase. First he contacts all Live Connect Providers he wants to use, and obtains all startup materials. Next, he makes sure all Live Connect Vendors are set up correctly. After that, his agents are ready to use Live Connect.

Quick Steps to Set Up Live Connect

Step 1) Sign up with each Live Connect Provider (booking engine) you are going to use to book reservations.

Contents	Index	Search	Favorites
Introduction			
Installation Guide			
Set Up ClientBase for Your Agency			
Import Profiles from Other Sources			
Get To Know ClientBase			
An In-Depth Look at Client Profiles			
Using the Profile Manager to Manage Your Prof			
E-mail Marketing in ClientBase			
Putting Profiles to Work for You			
An In-Depth Look at Activities			
Using the Activity Manager to Manage Your Act			
An In-Depth Look at Res Cards			
Live Connect			
Introduction			
Live Connect Reminders			
Live Connect Provider's Website without HT			
Live Connect Provider Tech Updates			
Live Connect Companion Shopping			
AFONET			
All About Travel			
Allianz Global Assistance (Canada)			
Allianz Agent Plex			
Allianz Travel Insurance - Website			
Amadeus AgentPlex V&X			
Amadeus Cruise			
Amadeus Total Cruise			
American Express Vacations			
Apple Vacations			
Audi Europe			
Avanti Destinations			
Berkshire Hathaway Travel Protection			
Brendan Vacations			
Casa Travel			
CORATravel Hotel Booking Portal			
Centrav			
Classic Vacations			
Contiki Vacations			
CSA Travel Protection			

Obtain a unique User Login and password from each booking engine directly (contact information is found in *Help* files under *An In-Depth Look at Live Connect* and clicking on the Provider's name.

[Step 2\) Enter Logins/Passwords if the Provider passes them to website \(more and more Providers are restricting this process\). Look in help files to find out if the provider you are setting up passes this information. Log into ClientBase as the SYSDBA and click on Utilities|User Logins|User List.](#)

(Each agent can do this themselves if they have permission by going to **Utilities|My Login**. Also if the same password and login is the same for all agents, just enter it under Global Defaults|Res Card Defaults|Live Connect Logins.) For each User Login, add a Live Connect Login by first clicking on the Live Connect Tab under the User Settings and then on Add. Complete the following fields:

- **Live Connect Provider:** Only a Live Connect Provider which is available for your use is listed on the drop down menu list. Select one that you have registered with.
- **User Name:** For each Live Connect Provider, enter the unique User Name assigned to your agency or to each user within your agency when you registered.
- **Password:** For each Live Connect Provider, enter the unique Password assigned to your agency when you registered. Not all Live Connect providers require a password. The field will be dimmed if that is the case.
- **Account Number/Agency Code:** For each Live Connect Provider, enter the unique Account Number assigned to your agency when you registered. Not all Live Connect providers require an Account Number or Agency Code. The field should be dimmed if that is

the case.

[Step 3\) Some Live Connect Providers \(booking engines\) provide you with vendor codes for each of its participating vendors. Create a profile in ClientBase for each vendor and specify the booking engine together with this unique vendor identifier if necessary.](#)

To do this first retrieve or create the vendor profile from which you would like to book using Live Connect. Click on the Live Connect Providers button in the General Info tab, and then on Add to add a Live Connect Provider. Select the booking engine (Live Connect Provider) from the drop-down menu and enter the vendor code if one applies. Look in help files for the vendor codes for each Live Connect Provider.

When you have finished this setup, you are ready to use Live Connect. Test this by creating a new reservation and entering a vendor. Launch Live Connect to see if you successfully go to the Live Connect Provider's website. Live Connect not working correctly? Go to www.trams.com, click on *Support|Known Live Connect Issues*. This lists all current problems with Live Connect Providers.

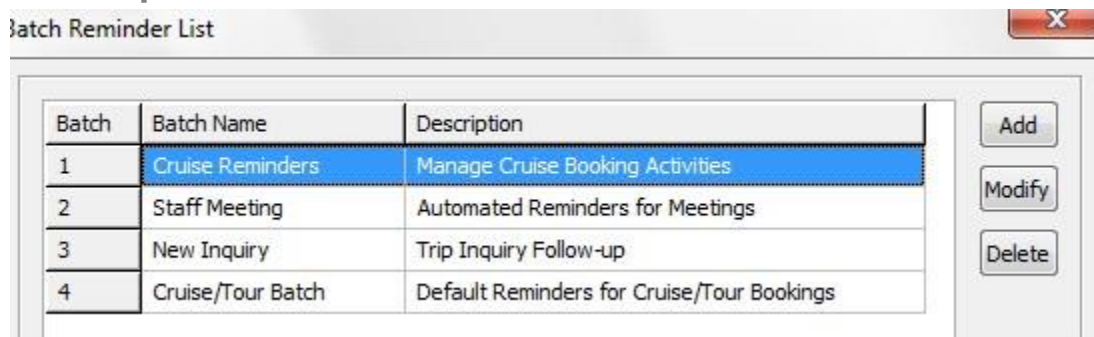
Set Up Batch Reminders, Required Fields and Default Values for New Profiles

Batch Reminder Settings enable you to assign multiple reminders at one time to a res card. Although you can add unlimited batches to this area, a default Cruise/Tour Batch has been created for you.

Database Administrators can designate required fields within a Profile, Activity or Res Card record that must be completed for the record to be saved.

Assign default field values to certain fields when a new profile is created. The following fields can be assigned a default value with this new feature: Courtesy Title, Zip Code, City, State, Country, Salutation and Interface ID. But our suggestion is to leave these alone except for the Interface ID particularly if you have Trams Back Office.

Quick Steps to Set Up Batched Reminders



Batch	Batch Name	Description
1	Cruise Reminders	Manage Cruise Booking Activities
2	Staff Meeting	Automated Reminders for Meetings
3	New Inquiry	Trip Inquiry Follow-up
4	Cruise/Tour Batch	Default Reminders for Cruise/Tour Bookings

Step 1) Go to Global Defaults|Res Card Defaults|Batch Reminder Settings.

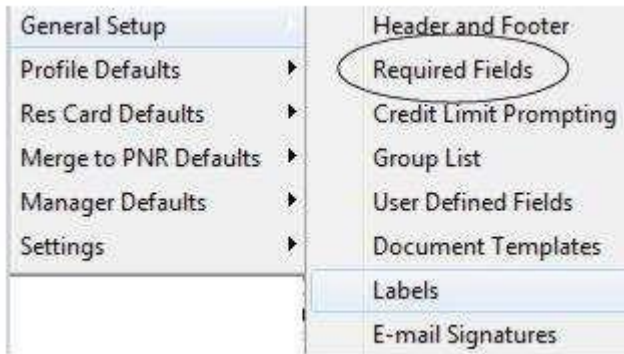
Click *Add* to add an additional batch, *Modify* to edit an existing batch, or *Delete* to remove a batch.

Step 2) Fill out the Batch Reminder Name and Description, and click Add to add the first batch reminder, and fill out the following information:

- **Create Reminder:** From the drop-down menu, select *Optional* or *Always*. An *Optional* entry prompts you to "check off" the reminder before placing it into a res card; the *Always* entry is already "checked off" for you. Default Date Using: From the drop-down menu, select Current Date, ResCard Create Date, ResCard Start Date, or ResCard Return Date.
- **Plus/minus|Number of Days:** From the drop-down menu select the plus or minus sign and choose the number of days to use in combination with the *Default Date Using* field.
- **To-Do:** Check here if you do not want to set a specific time for this Reminder to appear on your Day-At-A-Glance. All timeless activities appear on a separate area in your calendar, but not under a specific time frame.
- **Start Time:** Enter time if you want alarm to start alerting you about this Reminder; or if you want this Reminder to appear on your Day-At-A-Glance on your calendar as an appointment under the time you specify.
- **Duration:** Specify a block of time for this task to appear on your calendar.
- **Login Name:** Will default to the User logged into the system. Choose a different User by clicking on the drop-down menu.
- **Priority:** Click on the drop-down menu to tag this Reminder with a priority level - high, medium, or low. The Priority Level can be used as search criteria in both Level 2 Query of the Activity Manager and viewed in selected Activity Reports.
- **Private:** Check this box if you want the note to be private. Only the sign-in agent and SYSDBA can access the Reminder.
- **Reminder Type:** Enter the type of follow-up for the Reminder by clicking on the drop-down menu and picking from a customized list. Such types may include phone call, email, letter, etc. Reminder types are user-defined and set up in **Global Defaults|User Defined Fields|Reminder Type**.
- **Subject:** Enter the subject of the Reminder by clicking on the drop-down menu and picking from a user-defined list. Subjects are set up in Global Defaults|User Defined Fields|Reminder Subject.
- **Set Alarm:** To further assist with remembering important tasks, ClientBase Reminders include an optional alarm. Like the alarm which awakens you each morning, the alarm activates at the time designated within the Reminder (regardless of where you are in the ClientBase program, or any other program) as long as ClientBase is running on your PC. When an Alarm is activated, a window appears that includes the details of the Reminder along with three options:
- **Completed:** This field is empty until the Reminder is completed and a date is entered. Entering a *Complete Date* takes this Reminder off the To-Do list.
- **Remarks:** Enter any additional remarks or instructions in the text box at the bottom of the Reminder entry screen.

Step 3) Continue entering additional reminders for this batch.

Quick Steps to Set Up Required Fields

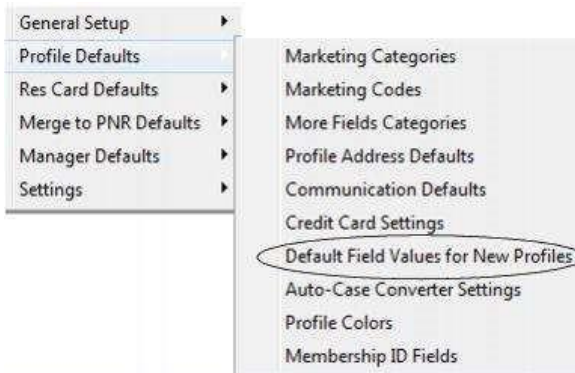


Step 1) Go to Global Defaults|Required Fields|Profile Fields.

By default no fields in a Profile are set as mandatory, but by going into and selecting the record type, set any field as either "Required", which means you cannot save the record without completing this field; or as "Optional" which means you get a prompt when saving the record. If this field is left blank, the system still allows you to save the record.

Step 2) Repeat setting up required fields for Activity and Res Card fields.

Quick Steps to Set Up Default Field Values for New Profiles



Step 1) Go to Global Defaults|Default Field Values for New Profiles|General Tab.

If you want a default field value for *Courtesy Title*, choose the default off the drop down menu. Items in this menu were setup under Global Defaults|User Defined Fields.

Step 2) Click the Address Tab.

If you want a default field values for Zip Code, City, State, and Country, choose the default off the drop down menu. Items in this menu were setup under Global Defaults|User Defined Fields.

Step 3) Click the Salutation Tab.

From the drop down menu, choose a field value if desired for *Salutation* which includes <First Name>, <First Name><Last Name>, <Courtesy Title><Last Name>, or <Courtesy Title><First Name><Last Name>.

Step 4) Click the Interface Tab.

In the Interface ID tab, choose from the drop-down menu a format for generating the default Interface ID. Use: <Area Code><Prefix><Suffix>; <Last Name><First Name><Agent Name>; <PROFILENO>; <GENERATOR> with starting number set by agency, or <MASK> based on the Full Name field, First Name field, Last Name field, the Residential Phone field, or a combination of the all those fields (from 1-10 alpha-numeric characters).

Streamline Marketing with Point and Click Codes

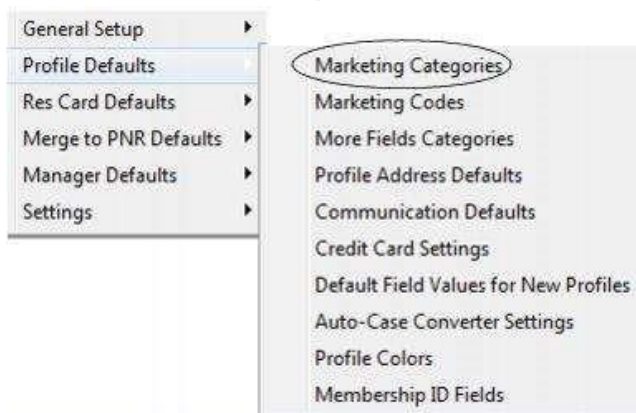
The Marketing Tables in ClientBase identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. These marketing codes make it possible to consistently put the right product in front of the right client, by both your front-line agents and your marketing programs geared towards generating travel interest. In addition, labels, letters, and emails can be quickly created to link clients and travel preferences when a "hot" travel special lands on your desk.

A master set of marketing tables appears in every client's profile under the **Marketing** folder. Eight of these tables come with pre-defined default codes (unless you are part of a consortium which has special tables/codes, but all of them can be

customized to meet your agency needs. With a point-and-click with the mouse, every agent selects from the same list, and that means consistency among your clients and simplicity for your agents.

Example: Steve Amaral 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 Steve'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 Steve is included with the other qualified clients you are tempting with the great deal!

Quick Steps for Tailoring Your Global List of Marketing Category/Codes



Step 1) Tailor the name of each Marketing Category.

From the main ClientBase screen, click on *Global Defaults|Profile Defaults* and then select *Marketing Database Administrators* can designate certain fields within a Profile, Activity or Res Card record as a mandatory field that must be completed for the record to be saved. *Categories*. Each table, or group of marketing codes, found in the Marketing tab is considered a Marketing Category. We helped you get started by naming the first 7 Categories (or if part of a consortium, these Categories have been added for you). To modify the table name of any of the Marketing Categories, highlight the Marketing Category and click *Modify*. A window appears prompting you for the Category Name. Enter the desired Category Name and click *OK* to save. To add a Marketing Category, click *Add* and enter the new name.

Step 2) Tailor the Marketing Codes included in each Marketing Category.

From the Main ClientBase Screen, click **Global Defaults|Profile Defaults|Marketing Codes**. A list of any Marketing Codes already setup in the system appears, including the category name and the code value. From here you can Add, Modify or Delete marketing codes.

- **To Add a Marketing Code:** Click *Add*, select the appropriate Marketing Category, then enter the desired code name in the field called Marketing Item. Use the up and down arrows to place the code in a desired location.
- **To Modify a Marketing Code:** Highlight the Marketing Code you would like to modify, then click *Modify*. Enter the desired code name in the field called Marketing Item. If any profiles have been coded with this item, the system prompts before saving.
- **To Delete a Marketing Code:** Highlight the Marketing Code you would like to delete, then click *Delete*. If any profiles have been coded with this item, the system prompts before deleting. A warning message appears advising you of the number of profiles with that marketing code attached. Once you delete the marketing code, it deletes it out of each profile. All marketing codes need to be deleted first, before you can delete a Marketing Category.

Note: If many profiles have been tagged with a marketing code, using Level 2 Query to call up profiles that have this marketing code checked off and remove it using **Utilities|Global Modify**. Then delete the marketing code as above.

Set Up Email for MAPI or SMTP

There are two email options available for using ClientBase's Merge to Email feature: **MAPI** (Messaging Application Protocol Interface) and **SMTP** (Simple Mail Transfer Protocol). **MAPI** requires use with compatible Email programs such as Microsoft Outlook. The **SMTP** option offers 2 benefits: It does not require a MAPI compatible Email program for the Merge to Email feature in ClientBase to work, and with this option, you can use extensive text formatting, even using HTML, as well as using Document Templates within your Email messages.

Example: Rainbow Travel wants to start sending out specials in HTML format. the database administrator sets up each agent with SMTP Email. If any outside agents wants to overwrite these selections to use MAPI compatible they can do so at the Workstation level.



Jim,
Email,

Quick Steps to Set Up MAPI

Step 1) Be sure you are MAPI Compatible.

Some sample MAPI compatible email programs include Microsoft Outlook and Lotus Notes. To learn if your email program is MAPI compatible, we recommend you visit the website of your email provider and search for information on MAPI compatibility. When you install the ClientBase program, MAPI is the option which is defaulted in the User Logins.

Step 2) Go to Utilities| Users Logins|User List.

To obtain a list of all User Login records, log into your database as SYSDBA (System Database Administrator). Highlight each User Login, click Modify and select the Email Settings tab. The *Default Email Client* is *MAPI*. No further setup is required. Click *OK* to save.

Step 3) From each workstation, sign into ClientBase and go to Workstation Defaults|Environment. Unless you need special workstation settings to override your User Settings setup by the SYSDBA as described above, verify that Default Email Client is set to Ignore.

Quick Steps to Set Up SMTP

Step 1) Find Your Mail Server's SMTP Settings.

SMTP is a standard protocol (language) used for sending email on the Internet or a network. Every mail server is capable of handling SMTP email. Your agency can utilize this SMTP feature providing it has the proper mail server configuration.

Contact the entity responsible for maintaining your mail server to confirm your SMTP settings:

- If you are hosting your own email server, contact the tech person who maintains or originally set up the server.
- If you are using another party for your email server, contact them by going to their website or calling their support line. You'll need to obtain the following information:
 - Your outgoing mailserver name (e.g., mail.domainname.com, smtp.domainname.com, orgomail.wspan.com).
 - Email account login and password if authentication to SMTP mail server is required.
 - TCP/IP Port used for Email. (Usually Port 25, but confirm this with your network administrator.)

Step 2) Set Up ClientBase with Your Mail Server's SMTP Settings. Go to Utilities| Users Logins| User List.

To obtain a list of all User Login records, log into your database as SYSDBA (System Database Administrator). Highlight each User Login, click *Modify* and select the Email Settings tab. Change the default *Email Client* from *MAPI* to *SMTP Client*, from the drop down list.

Step 3) Complete the User Login SMTP Settings obtained from the entity responsible for maintaining your mail server.

- **Default Email Client:** Choose SMTP off the drop down menu.
- **Default SMTP Mode:** Offers different options for creating the body of the email message. Select either *Formatted Text*, *Document Templates*, *Raw HTML* or *Plain Text* from the drop down list. This setting determines the default *Mode* when using the *Merge to Email* feature, but can be changed when sending an email.
- **Outgoing Mail Server:** Enter your outgoing mail server name determined in your steps above. Examples: mail.domainname.com, smtp.domainname.com, or gmail.wspan.com).
- **Port:** This setting defines the TCP/IP port which your email application listens on for incoming mail. If left blank, this setting uses port 25 by default, which is the Internet standard for receiving SMTP mail. In some situations, you may have chosen to move the SMTP service to another port. Perhaps you already have a service on port 25, and you do not want the services to conflict over the port assignment. In such a case, enter the port ClientBase should use.
- **From Email Address:** Enter the email address for the User Login you are setting up. The address entered here appears as the from address for all emails sent from this User. If you wish to change this address frequently, you can do so at the email level when you are sending it out.
- In the From Email field, if you type **joseph@Trams.com** and a message is sent, you see the From field saying **joseph@Trams.com**. Some people prefer it to look like this instead, **Joseph Melika**. To have it appear like this, type **Joseph Melika<joseph@Trams.com>** instead of just **joseph@Trams.com**. You can also use your company name or department name; for example, Travel With the Stars<sales@TWTS.com> or Star Travel Marketing<sales@TWTS.com>.
- **Login Type:** Set to either None or Simple Login:

- *Simple Login*: A setting used to authenticate your connection to the SMTP mail server by forcing a USER Name and Password. If your network login does not handle this authentication automatically, then set this field to *Simple Login*.
- *None*: If your agency is hosting your own email server and your network login has been configured to handle the authentication to your SMTP Server automatically, set this field to *None*.
- **Email Account Login and Password**: Use when Login Type is set to Simple Login. Enter your Email Account Login and Password here.

Click *OK* to save.

Step 5) From each workstation, sign into ClientBase and go to Workstation Defaults|Environment. Unless you need special workstation settings to override your User Settings setup by the SYSDBA as described above, verify that Default Email Client is set to Ignore.

Maintain Your ClientBase Database with Profile Dupe Checker

As your customer database in ClientBase grows, so does the possibility of having duplicate profile records for the same entity. Many of you who have Trams Back Office already have loads of duplicate client and vendor profiles. Since duplications only water down the effectiveness of your database, a utility has been created in ClientBase that lets you identify common criteria within multiple records that can be used to display *possible* duplications in your system. The program then allows you to set one profile as the *master* and then merge the duplicate profiles into that master profile. Then you can delete, or mark as inactive, these unwanted profiles.

Example: *Mary, the agency manager, wants to clean up duplicate profiles. She sets up the Profile Dupe Checker. Ensuring that the duplicates displayed in the Results Screen are valid, she chooses the master for each duplicate and merges other profile data into it. Thereafter, Mary maintains a regular Profile Dupe Checker schedule.*

Quick Steps to Use Profile Dupe Checker

Field Name	Length	Direction
<input checked="" type="checkbox"/> Profile Full Name	10	Left to Right
<input type="checkbox"/> Profile Last Name	5	Left to Right
<input type="checkbox"/> Profile First Name	5	Left to Right
<input type="checkbox"/> Interface ID	10	Left to Right
<input type="checkbox"/> Primary Addr. Line 1	5	Left to Right
<input type="checkbox"/> Primary City	5	Left to Right
<input type="checkbox"/> Primary Zip Code	5	Left to Right
<input type="checkbox"/> Primary Phone	5	Left to Right
<input type="checkbox"/> Primary E-mail	40	Left to Right

Step 1) Backup your database using the Trams

Backup utility by going to Start|Programs|Trams|Trams Backup Restore.)

Step 2) Access the Profile Dupe Checker.

Go to Utilities|Profile Dupe Checker, right-mouse click in the results screen after performing a Level 1, 2, or 3 query and click *Dupe Check*, or in the Profile Manager Screen, click the *Dupe Checker Results* tab and then *Filter* to access the Profile Dupe Checker utility.

Step 3) Do the Comparison.

Designate the criteria with which the system searches and compares profiles. Be sure to include aggressive filters to narrow your results as much as possible. You do not want to merge profiles that really are not duplicate profiles after all.

- **Check for duplicate profiles in:** From a drop-down menu, select the type of profiles to include in the duplicate search. Choices include Entire Database, Current Results in Level 1 Query, Current Results in Level 2 Query, and Current Results in Level 3 Query. If you do not want any filters on profiles, check *Disable Dupe Check Filters*.

- **Include Profile Types:** Select the type of profiles to include in this duplicate search. Check any or all profile types by clicking once on the check box. (**Hint:** It may be easier to search for duplications one profile type at a time except in the case of Leisure/Corporate.)

- **Field Name, Length, Direction:** Select the fields to compare and search

for common entries. The fewer you select, the more results you are likely to find. The more you select, the more discriminating the system is in displaying possible duplications.

To select a field name, place a check in the box by clicking once. Then, the length of the field search and direction can be established. The length is a numeric field, indicating the number of characters within that field to be compared. Select the direction by clicking the arrow to the right of the field and choosing either *Right to Left* or *Left to Right*.

Keep it simple, perhaps using only the Last Name, Address 1, and Phone (or email) as criteria. By default *Ignore Profile if ALL filter fields (above) are BLANK* is checked. Also defaulted is the checked box, *Active Profiles Only* if you don't want to include profiles that have been designated as "inactive." Since duplicates can exist within inactive profiles, unchecking this

box may produce more thorough results. To display duplicate corporate and leisure profiles grouped together, check *Group Leisure and Corporate Types Together*.

The system compares profiles, then displays a list of all those with common elements sorted by the fields used as search criteria. For example, if last name and email are the search fields, all profiles with the same last name and email are listed together shaded in gray or blue in the results screen of the profile manager under the Dupe Checker Results tab.

Keep in mind the resulting profiles with common data may not actually be a duplication of the same customer. For example, if the criteria entered for doing the comparison are last name and first name, your results may include different customers with the same name.

Step 4) Decide which profile to use as the Master (the one that information is merged into).

You can manually select the Master profile from within each dupe grouping by clicking on the desired Master Profile and clicking *Set as Master*. Best not to use the *Auto Set Your Masters* unless you contact support for guidance.

Step 5) Review your entire listing of possible dupe groupings to identify any groupings that are not definitely duplicate profiles and un-select the master profile so they do not result in merging. For example, your Dupe Check results may include 100 profiles made up of 40 possible dupe groupings. You may determine that 5 of those possible dupe groupings may not be dupes and so you do not want to merge them. Be sure to unset those Masters so they do not get merged. This is done by individually highlighting each undesired Master (the profile in red) and clicking *Set as Master*, a button, which toggles between set and unset as Master (profile is no longer in red). Any dupe grouping without a Master set will not get merged.

Next, highlight the profile you want to merge into the master and click *Merge* if you are merging profiles one at a time, or *Merge All* if you want to merge each grouping of dupes within the Dupe Check results that has a *Master* profile set for that grouping, all at one time.

Upon clicking *Merge*, the system prompts with a screen that allows you to select and include merging data from the following profile tabs: Addresses, Communications, Special Dates, Cards, PNR Entries, Family Members/Employees, Groups and Attachments. (The system automatically merges all Activities, Marketing Codes, Res Cards, Invoices, Payments and Unapplied Balanced from the duplicate profile into the profile designated as the Master profile.)

When including any of these tabs of data in the profile merge, all data is appended to existing data within the master profile and removed from the duplicate profile. Place a check next to each tab you choose to include in the merge. These check marks are saved locally and will be "remembered" the next time you merge profiles from the Dupe Check feature. Delete Profile/Set Profile to Inactive: Once deleted, all data from the old profile not included in the merge is erased. If you are unsure you may want to say no to deleting and mark these profiles, once merged into the master, as inactive instead. Upon clicking *OK*, the merge takes place. If you have selected *Merge All* you will receive a prompt with a message *XX Profiles will be merged into 14 Masters. Merge ALL profiles to their Masters? Verify that the numbers align with what you are trying to merge before selecting OK.*

Note: Sync Activated databases can only be set to inactive rather than deleted upon merging. This setting has been hard-coded to reduce the potential for unresolved items to occur during synchronization as the result of one location updating a profile while the other location is deleting that profile via Dupe Checker.

***Important Note:** Steps 1 and 5 are the most important steps within this process. Once a profile is merged to another, there is no way to "un-merge" them so you want to be very careful that you review the listing of potential dupes and unset any Masters that you have any question are not actually duplicate profiles. We also recommend that you limit access to this feature via your ClientBase User permission settings (go to **Advanced Permissions|Menu Options** and uncheck *Profile Dupe Checker* within the Utilities menu options when you set user up by going in as SYSDBA and clicking **Utilities|User Logins**). Consider this a power tool that should be used with great caution and proper training.

Step 6) Maintain Regular Dupe Checker Schedule.

Maintaining a rich (yet clean) database of accurate customer information improves the effectiveness of every marketing effort. Run the dupe checker regularly to eliminate duplicate profiles.

Improve Efficiency with Global Modify

Global Modify allows you to change multiple profiles simultaneously without having to enter each profile to make the desired change. Use this feature to enter a value in a profile field or replace an existing value in a profile field. Use the Global Modify feature to add or remove a Marketing Code, or to Add, Remove, or Change Profile Group Names.

Example: You have an agent, Mary, who left your company and is listed as the primary agent in a number of corporate profiles. You have assigned a new agent, Sharon, to these corporate clients and want to replace Mary's name on all the corporate profiles with the Sharon's.

Quick Steps to Use Global Modify

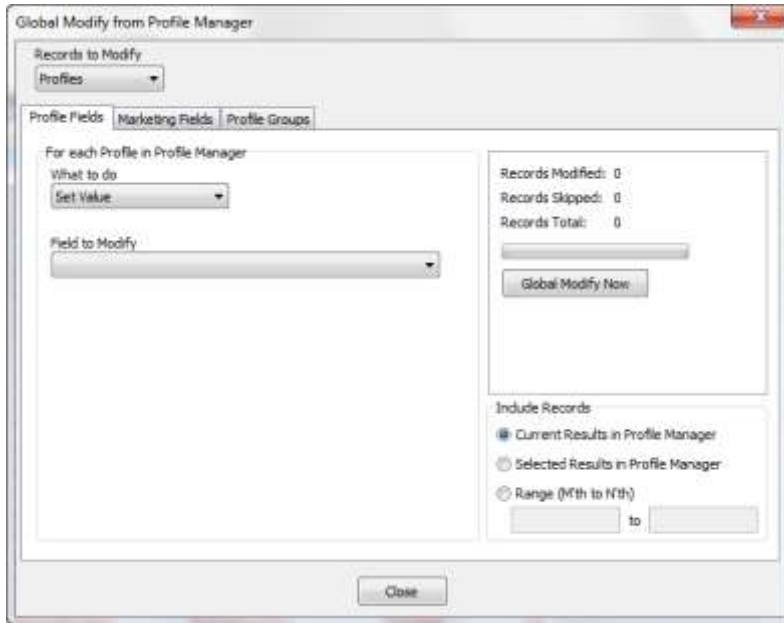
Step 1) Perform a backup of the ClientBase Database by going to Start|Programs|Trams|Trams Backup/Restore.

When you use global modify, you make permanent and automatic changes, therefore, we suggest you backup your database before using this feature. In doing so, you will find that you are covered in case you change something unintentionally. If you have a backup, you have the option to overwrite the changes you have made and try again.

Step 2) Query your database.

Use the Level 1, 2, or 3 Queries for the profiles, activities, or res cards to modify. In the above example, to replace one agent in a profile with another, go to the Profile Manager tab for this query. Select Level 2 query, click Filter, and enter the original agent in the Primary Agent field. Click OK to execute the query.

Step 3) Select Utilities|Global Modify and indicate whether to input, set a value in a field, or exchange the values in a field with the values in another field.



Globally Modifying Profiles: Select *Set Value* or *Exchange With*. Fields available to modify:

- **Profile:** Last Name, First Name, MI, Courtesy Title, Interface ID, Primary Agent, Branch, Web ID, Web Password, Referred By, Salutation, Creation Date, Create By, Active, Vendor Commission % (Vendor Only), Travel Category (Vendor Only)
- **Primary PhoneTable/FaxTable:** Country Code, Area Code
- **PhoneTable, FaxTable, EmailTable:** Marketing Permission
- **PrimaryAddrTable, BillToAddrTable, ShipToAddrTable, AlternateAddrTable:** Address Line 1/Line 2, Apt/Suite, City, State, Zip Code, Country, Description
- **More Fields**
- **Marketing Codes:** Add or remove marketing codes from query results. **Groups:** Add or remove groups from query results.

Globally Modifying Activities: Globally modify Activities or Profiles to which Activities are linked. Select *Set Value* or *Convert Type*. Select Activity to Modify (Reminders, Notes, Mailers). Fields available to modify: **Activity** - *Date of Reminder, To Do, Login/Created Name, Priority, Private, Type, Subject, Completed, Remarks.*

Globally Modifying Res Cards: Globally modify Res Cards or Profiles to which the Res Cards are linked. Fields available to modify: **Rescard:** Status, ResCycle, Create Agent, Marketing Source, Group Name, Branch #, Trip Name, Locator #, and Region/Destination

Step 4) Identify Records to Include.

On the bottom right side of the Profile Fields and the Marketing fields screen, there is a setting called Include Records. This defines whether you use all the profiles that are in the profile query result screen, or use only ones that have been highlighted and selected. You also have the ability to apply changes to a range of profiles within the current results. When selecting Range (Mth to Nth), enter the range of profiles you want to Global Modify. This range is based on the line number from and to within the results of the current query.

Step 5) Click Global Modify.

Finally, select *Global Modify Now*. Confirm that you want to global modify. Remember, this makes an automatic change that is not reversible. Please check your steps carefully before committing. Click Yes to continue or No to cancel. You are notified once the global modify is complete. You also see statistics of how many of the total records were skipped or modified.

Use Merge to File, Merge to File Handoff & Export

ClientBase provides agencies with the ability to export data in three different ways. For your own protection, make sure that only the ClientBase Database Administrator has the ability to export files using these utilities.

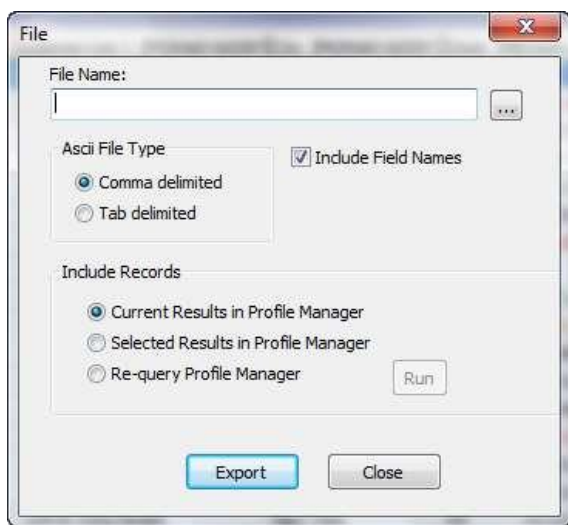
Quick Steps to Merge to File

You can use the results of a profile query to Merge to File. This enables you to create a text (.txt) file which can be emailed to a location of your choice or put on a disk. This is particularly useful for agencies who use mailing houses to do bulk mail or need to send their computer lists to consortiums for special mailings.

Step 1) Query the profiles you want to merge to file.

The first step in using the Merge to File feature is to use the Profile Manager to find the profile(s) you want to merge to the File.

Step 2) Go to Merge|File.



Fill in the File name and select to which folder or disk you want the file exported; select type of delimiter you used to create the fields (usually tab); specify if you want to Include Field Names; and select which records you would like to include.

Step 3) Click Export to Merge to File.

By clicking "Export", your file is created and ready for you to either email or send to the recipient.

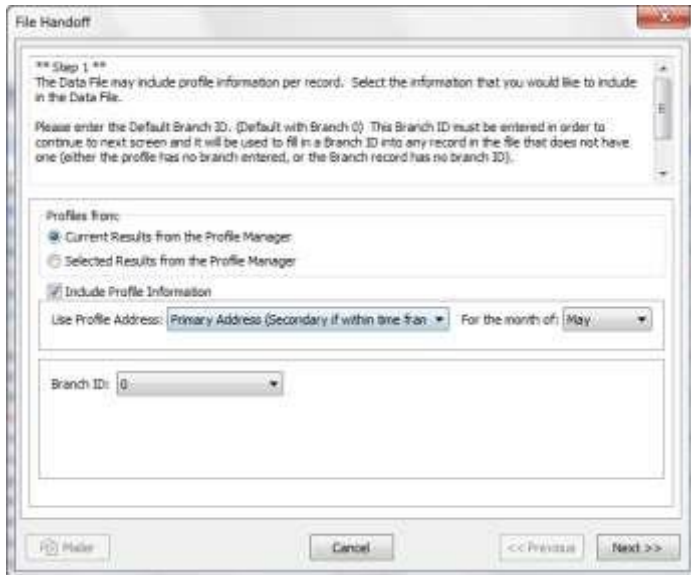
Quick Steps to Merge to File Handoff

The File Handoff feature is a streamlined approach to creating and sending files to another entity, such as a mailing house or consortium for participation in a direct mail program. The Merge to File Handoff uses a Wizard approach, walking you through setting up the ASCII file, keeping a history within the profiles included via a Mailer record, and then sending the file via email.

Step 1) Query the profiles you want to use with Merge to File Handoff.

Use the Level 1, 2 or 3 Query to query your database for just those profiles you would like included in the ASCII file created by this feature. Use also the Edit Menu or right mouse click in Results Screen to "Invert All", "Select All" or "Unselect All" in your Results Screen.

Step 2) Go to Merge|File Handoff.



A wizard appears for you to identify what profiles to include, what address information to include and what Branch ID should be used for any profiles that do not have a Branch ID associated.

Please note, the Branch ID is mandatory to ensure that each profile from your database is associated with your agency or branch identification, in case the file is consolidated into a larger database of other agency profiles. The Branch ID can be entered here or by going into the Utilities Menu, selecting Branch, using Modify to enter the Branch record, and then completing the Branch ID field, located to the right of the Pseudo City field.

[Step 3\) Map Marketing Tables.](#)

The file created by this process is hard-coded to include 7 Marketing Fields labeled with the field names of When, Where, With Whom, What Type, What Interest, What Budget and Client Status.

Map the marketing tables in your database to the appropriate marketing field in the file by clicking on the down arrow next to each marketing field, and selecting from your drop down list of marketing tables. If your agency does not maintain a marketing category for any of the 7 hard coded marketing fields, then simply leave that field blank.

[Step 4\) Select Delivery Method.](#)

Select the delivery method of either email (MAPI or SMTP) or Save to Disk. If either MAPI or SMTP If email is selected then an email message will appear and the ASCII file will be automatically attached.

[Step 5\) Click Finish to Complete the Export.](#)

Review a summary of the options selected so far in Steps 1 to 4. Use the *Previous* button to go back and make any changes. Click *Mailer* to create a mailer record for those profiles included in the file. Click *Finish* to create the file and complete the handoff.

Using the File Export

This is the most robust export option in ClientBase and can be extremely complicated in getting it correct. It is highly suggested that you call or email support at Trams.CBSupport@sabre.com and set up an appointment for help with this utility.

Train and Motivate Front-Line Agents on ClientBase

We at Trams feel strongly that the easiest and fastest way to get ClientBase up and running is to assign an In-House Trainer to implement the program. We suggest the in-house trainer take WebEx classes and listen to recorded trainings on the www.trams.com site to learn all about ClientBase features, setup, and how to train agents. Furthermore, the 5-step all-inclusive training program posted on the Trams website under **Training|ClientBase|Getting Started** is designed to help the In-House Trainer with training agents.

ClientBase Quickstart Training Program



We at Trams and ClientBase Products and Services, feel strongly that the easiest and fastest way to get ClientBase up and running is to assign an In-House Trainer to implement the program. We suggest this trainer attend our live WebEx ClientBase General Overview and the Starting with the Basics classes which were intentionally designed to go hand-in-hand with this program. If you need help setting up the program before you start training, e-mail Trams.Implementation@Sabre.com. The enclosed 5-step all-inclusive training program is designed to help the In-House Trainer successfully train agents on the 5 basic ClientBase concepts:

- Packet One: Learning Basic Profile Skills
- Packet Two: Learning Merge to PNR
- Packet Three: Updating Marketing Codes
- Packet Four: Getting Started with Res Cards and Reminders
- Packet Five: Enhanced Res Card Skills

How Does the In-House Trainer Begin?

The following steps outline how to use each of the 5 training packets:

1. **Overview** – Each training packet starts with a general overview of the skills that will be covered. Read this overview before starting each concept.
2. **Class Outline** – To help you train your agents on each skill, a class outline of the material to review is included.
3. **Agent Handouts** – Practice makes perfect. After training your agents on a skill using the class outline, agent handouts are provided including “Cheat Sheets” and practice drills.
4. **Monitor Results** – This is probably the most important part of the training program. The only way to ensure your agents “get it” is to track results. This section gives you queries and reports for you to see who’s caught on and who needs help.
5. **Additional Resources and Skill Enhancement** exercises are also included at the end of each packet.

The program consists of 5 basic ClientBase concepts:

- Packet One: Learning Basic Profile Skills
- Packet Two: Learning Merge to PNR
- Packet Three: Updating Marketing Codes
- Packet Four: Getting Started with Reminders and Res Cards
- Packet Five: Enhanced Res Card Skills

The following steps outline how to use each of the 5 training packets:

1. **Overview** – Each training packet starts with a general overview of the skills that will be covered. Read this overview before starting each program.
2. **Setup** – This section guides you through the process of setting up the area of ClientBase you need to utilize to train your agents.
3. **Class Outline** – To help you train your agents on each skill, a class outline of the material to review is included.
4. **Agent Handouts** – Practice makes perfect. After training your agents on a skill using the class outline, agent handouts are provided including “Cheat Sheets” and practice drills.
5. **Monitor Results** – This is probably the most important part of the training program. The only way to ensure your agents “get it” is to track results. This section gives you queries and reports for you to see who’s caught on and who needs help.

Example: Mary, the agency manager, after attending class, holds a staff meeting introducing her agents to the ClientBase QuickStart Program. She has done all setup and preparation for Packet 1 and proceeds to follow the class outline to teach this concept. She has agents practice the concept using the agent handouts included in the course. Agents practice each new skill for 1-2 weeks, before beginning the next packet. Mary tracks agent progress by using ClientBase reports outlined in the QuickStart manual. As agents learn each new skill, they slowly but surely learn how to use ClientBase.

Sample Reports:

- 1) **Quantity** - How many Profiles are being created/modified, and by whom? Query Profile Mod Date: From =-1,0,0 To =-1,0,0 - User Stats/Client Survey.
- 2) **Quality** - What fields are being missed when a Profile is created, and by whom? Query Profile Mod Date: From/To =-1,0,0 User Stats/Completed Field Stats.
- 3) **Tools for Measuring Agents’ Progress:**
 - Why are agents not finishing reminders? Past Due Reminders (Activity Reports) Query Open Reminders To =-1,0,0 – Current Query Results or User Stats by Type.

- How are Reminders being closed out? Closed Reminders (Activity Reports) Query Closed Reminders From/To =-1,0,0 and look at remarks.
- How many new trips inquiries were made? By whom? Did agents set up reminder to followup on inquiry? New Trip Inquiry (Res Card Reports) Query Res Cards, Sales Cycle Under Consideration, From/To =-1,0,0 List or Agents Stats.
- When a trip is booked, are reminders being set up for first deposit, final deposit, documents check, and Welcome Home? Query Res Cards, Sales Cycle Booked, From/To =-1,0,0 List.

For additional reports, refer to the ClientBase QuickStart Training Program. Need help with training agents? Email Trams.Training@sabre.com .