

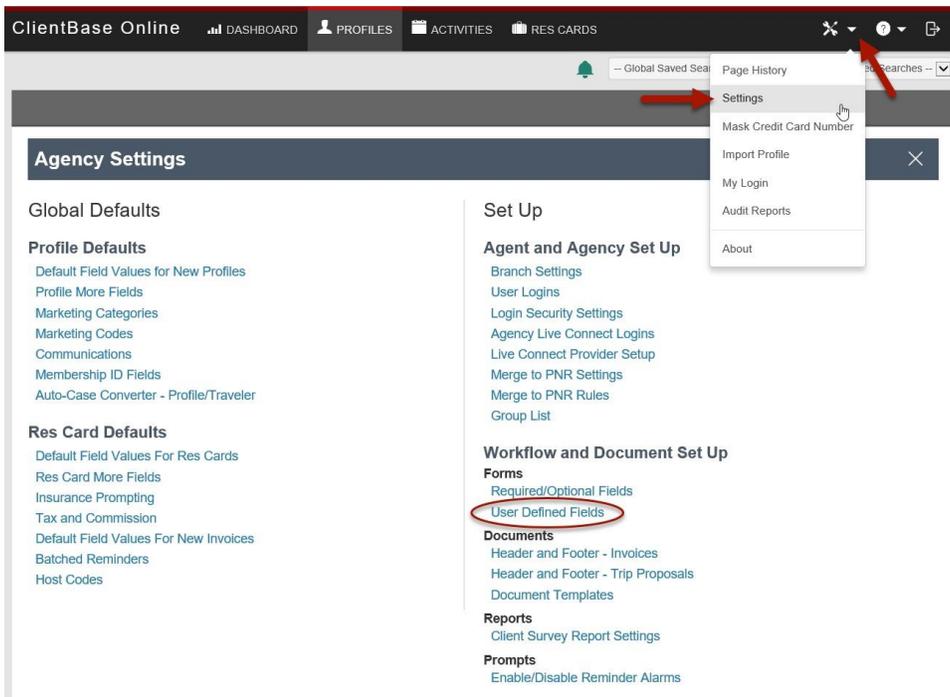
## Commission Tracking

This guide will outline the steps to track commissions in ClientBase Online by creating a Reminder for tracking, searching for the Reminder, sending a file to the Host (if applicable) for follow-up and marking the Reminders closed once commission has been received.

### Add *Commission Due* to User Defined Field 'Reminder Type'

1.

Go to **Tools > Settings > User Defined Fields**.



2. Click on the **Field** drop down. Move down and select **Reminder Type**.



3. Select **Add**.

4. Add **Commission Due** as the field name. Select **Save**.

Field:

Allow "Free Flow"

**Reminder Type**

Appointment

Email

Mail/FAX

Phone Call

Task

**Reminder Type**

Appointment

Email

Mail/FAX

Phone Call

Task

Commissison Due

We strongly suggest you uncheck Allow "Free Flow" for data consistency.

## Create a Reminder for Commission Tracking

1. In the Res Card, select **Reminders > Create Single Reminder** OR click on the **Activities** link and select **Create Activity > Reminder**.

**Res Card - Young/Patrick**

**Res Card Totals**

Currency	Trip Total USD
Res Total:	9,716.00
Invoiced Total:	1,000.00
Balance:	8,716.00

**Res Card No.: 73911683**

Agent: **Beth Vollmar**  
 Status: **Active**  
 Res. Cycle: **Booked**  
 Trip Name: **Rome**  
 Trip Start Date: **03/09/20**  
 Trip End Date: **03/23/20**

**About this trip:**

- General Info
- Travelers
- Reservations
- Invoices
- Itinerary Report
- Activities**
- Attachments
- More Fields

**Activities**

**Filters**

**All Activities**    Mailers    Notes    Reminders    Open Reminders

No Activities.

2. Fill in the following fields:
  - a. **Date of Reminder** = First day of the month the commission is expected in
  - b. **Reminder Type** = Commission Due
  - c. **Subject** = Vendor, Amount Due, Invoice Number, Host/Vendor who is paying the commission, Return Date

**Reminder General Info**

Date of Reminder: 04/01/2020

To Do (Timeless)

**Reminder**

Reminder Type: Commission Due

Priority: Med

Subject: DLV; 358.23; Inv 23459; 23Mar20

## Search for Commission Due Reminders

1. In the Activity Manager, select **Go To Advanced Search**.

ClientBase Online | DASHBOARD | PROFILES | **ACTIVITIES** | RES CARDS

**Activities**

Merge Options | Create New: Profile | Res Card | Note | Mailer | Reminder

**All Activities**

Find Activities by...

Login Name:  Select: All Notes, Reminders, and Mail

From Date:  To Date:

2. Fill in the following fields:
  - a. **Activity Type** = Reminders
  - b. Select **Not Completed/Responded** from the drop down
  - c. **Activity date:**
    - i. Leave the beginning date blank. By leaving this field blank, the results will include all prior reminders.
    - ii. Use the date formula =31,-1,0 to search for Reminders through the prior month. For example, if you run the search in June, the results will include all Reminders through May.
  - d. **Reminder type** = Commission Due
  - e. Select **OK**.

Activity Profile

**Activity Type**

Reminders  
 Mailers  
 Notes

Completed/Responded  
 Not Completed/Not Responded

**Activity Date**

From [12] through [12] =31,-1,0

**Activity Details**

Login Name [ ] Create User [ ]

Priority [ ]

Private

Reminder Type  
 Commission Due --Reminder Type--

3. Click on **Select Columns**.

**Find Activities by...**

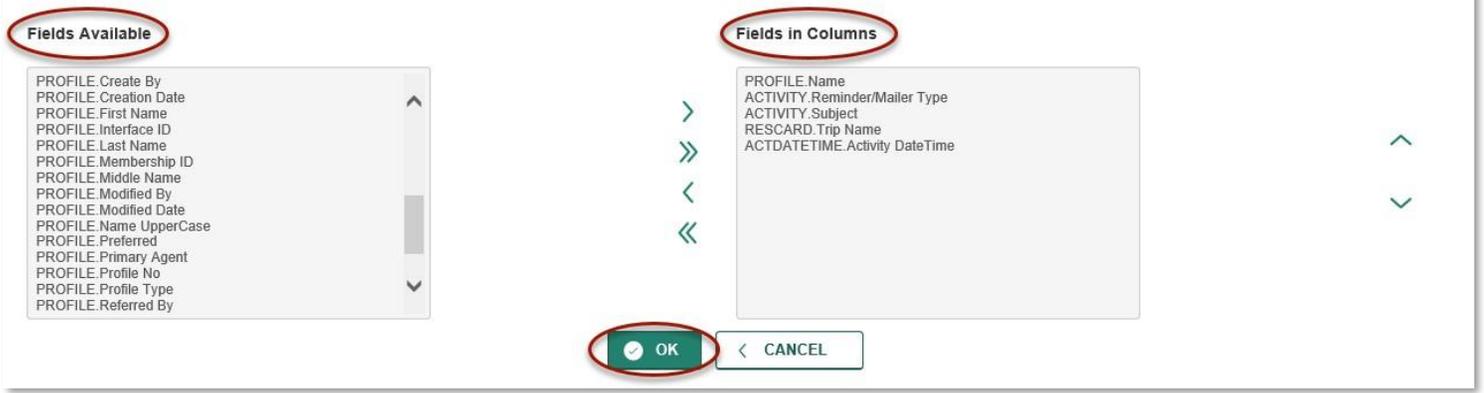
\*\*\* Activities  
 Reminders (Not Completed/Not Responded)  
 Activity Date Less than or Equal to "=31,-1,0" [2/29/2020]  
 Reminder Type Starts With "Commission Due"

ENTER DATA TO SEARCH BY BACK TO SIMPLE SEARCH

✓ COUNT First | Previous | Next | **Select Columns** | Sort by Columns | Saved Searches

Type	Login/Created Name	Name	Activity DateTime	Subject	Reminder/Mailer Type	Duration	To Do	Comp
R	BETH	Young/Patrick	2/1/20 4:15 PM	DLV; 358.23; Inv 23459; 23Mar20	Commission Due	15	N	

4. Select the following fields to appear in Fields to Columns. NOTE: You may need to select fields from Fields Available and move them to Fields in Columns (using the blue arrow). And there may be Fields in Columns that you may need to move to Fields Available. They do not need to be in any specific order.
- a. **PROFILE: Name**
  - b. **ACTIVITY: Reminder/Mailer Type**
  - c. **ACTIVITY: Subject**
  - d. **ACTDATETIME: Activity DateTime**
  - e. **RES CARD: Trip Name**
5. Select OK.

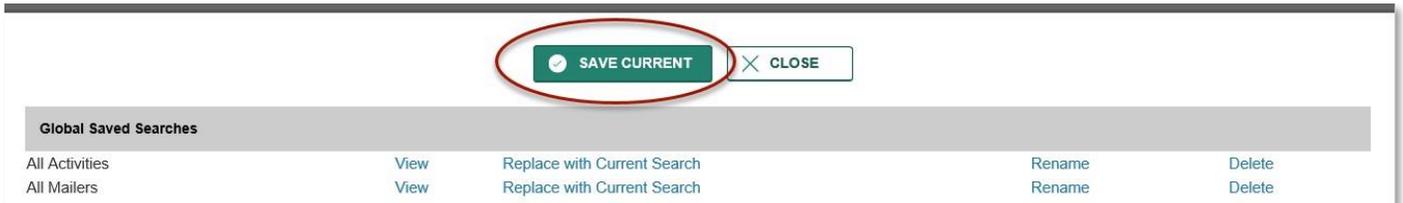


## Save the Search

1. Once the search is complete, select **Saved Searches**.



2. Select **Save Current**.



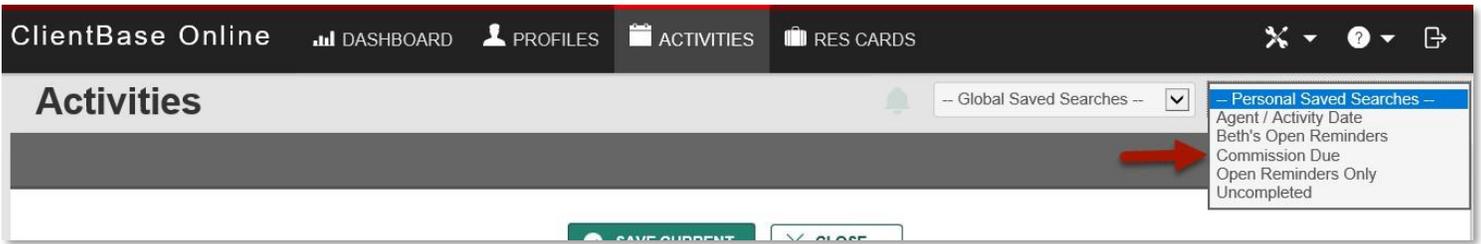
3. From the drop down, select **Personal** or **Global**.

- a. Personal is a search available to whomever is logged in creating the search
- b. Global is a search available to anyone

4. Select **OK**.

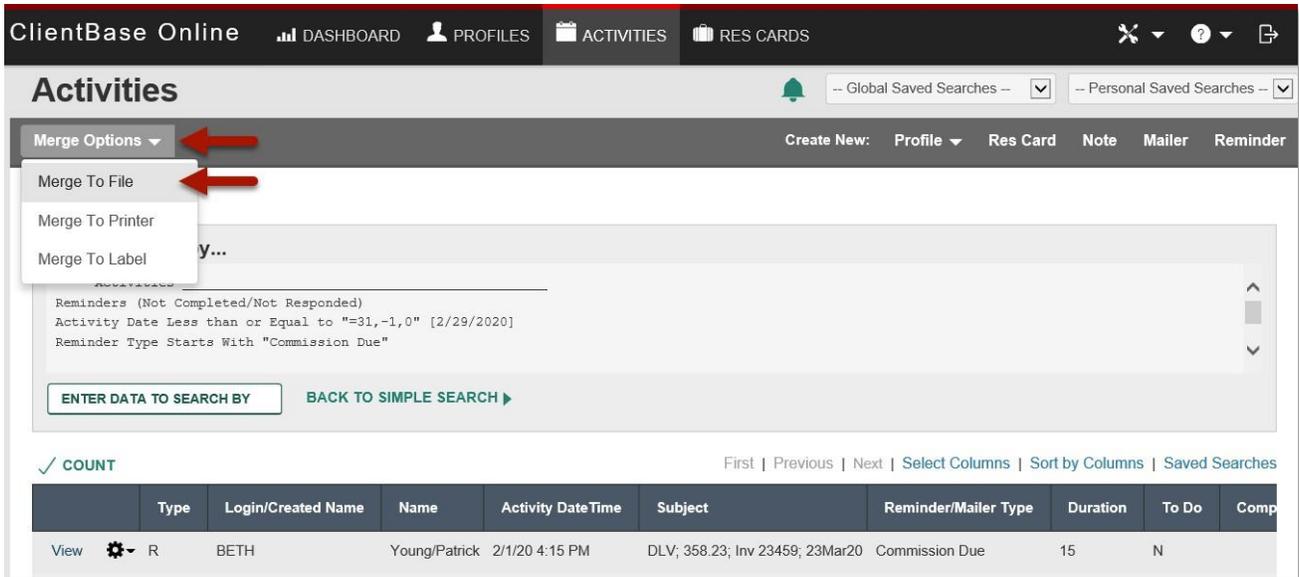


5. This search is now available in the search drop down.

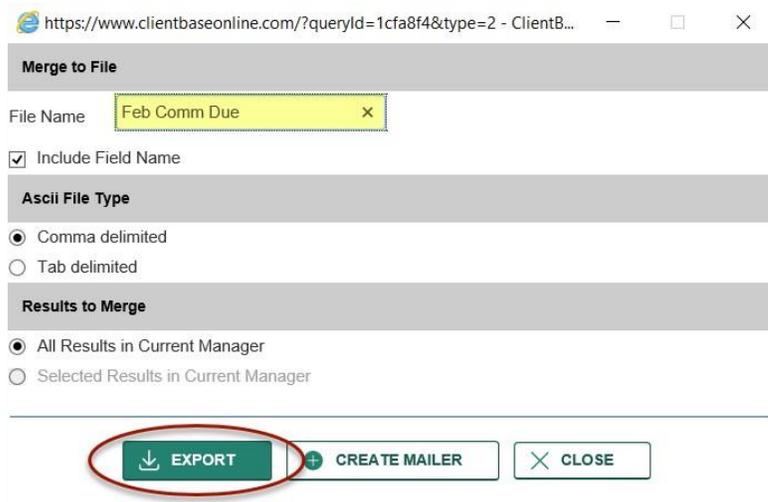


## Merge to File

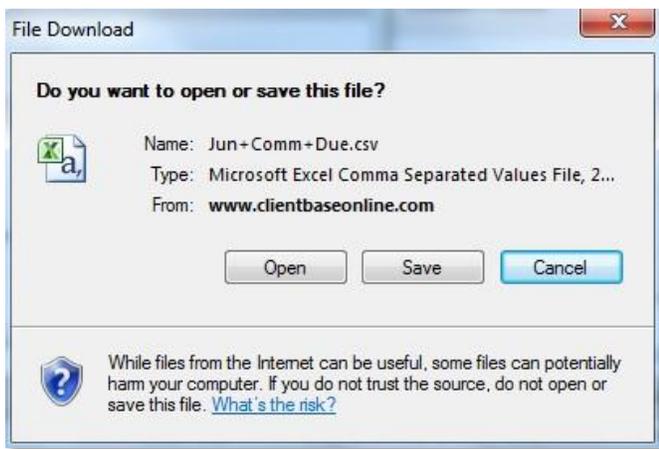
1. Select **Merge Options > Merge to File**.



2. Enter a **File Name**. Select **Export**.



3. Select **Save** to save the file to your computer or select **Open** to view the file.



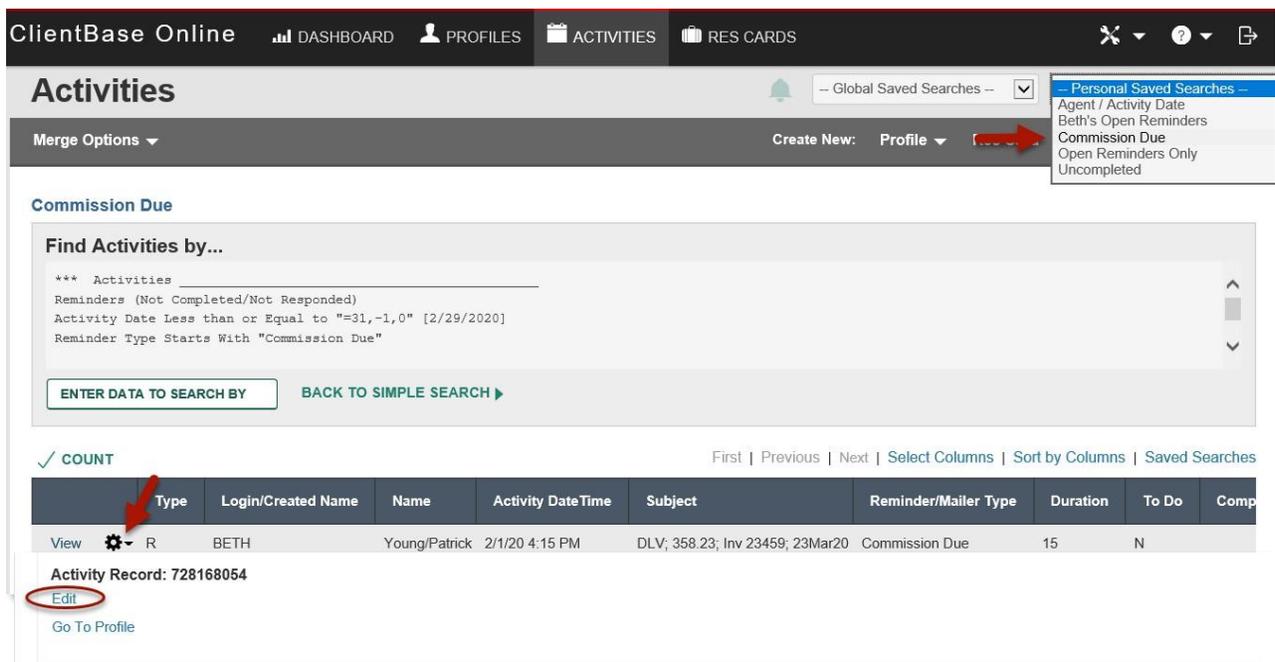
4. The file will open in Excel.

	A	B	C	D	E	F
1	Name (PROFILE)	Reminder/Mailer Type (ACTIVITY)	Subject (ACTIVITY)	Trip Name (RESCARD)	Activity DateTime (ACTDATETIME)	
2	Young/Patrick	Commission Due	PCL \$587, Inv 34898, Host, 04Jun15	Anniversary Cruise 2016	6/1/2015 14:30	
3						
4						

## Mark Reminders Completed

When commission has been paid, it is important to mark the Reminder completed. By marking the Reminder completed, it will not appear on any future searches.

1. Run the **Saved Search** you created above.
2. Click on the 'gear' to the left of the name and select **Edit**.



3. Move down to find the Completed field. Enter a check mark to mark the Reminder completed.
4. Enter notes in Remarks (optional).

Completion Date

Completed

04/20/2020 

Update E-mail Calendar after Saving Changes

E-mails will be sent to your address: beth.vollmar@sabre.com (You can change your e-mail address on the [My Login](#) page.)

**Reminder**

Reminder Type

Commission Due -Reminder Sel-

Priority

Med  Private

Subject

DLV; 358.23; Inv 23459; 23Mar20 -Subject Sel-

Remarks

Comm received, \$358.23, 4/20/20