

**When Using Datalink, you can Click on any BLUE Box to change that Parameter**

There are Four Options

2 Reports Sorted on Highest Revenue Order with ability to view a portion thereof

- a. Number of Clients
- b. Percent of Clients based on Revenue

Excel - List of information for each customer with color coding (if any) for Customers - Sales or Revenue (Commissions)

Trends - Graph for Each Customer in Highest Revenue Order - Sales or Revenue (Commissions)

List of Leisure Customers, ranked by highest volume of business with any or all Travel Categories -

Air, Hotels, Cars, Tours, Cruises, Rail, Transportation, Fees and Insurance

summarized by years

based on Res Card Date, Reservation Date or Trip Start Date

for all or one Vendor (Supplier)

Uses data only within Res Cards for this report. Maximum of 6 years. - ( 5 years for Excel Export)

Selection Criteria

Date in Res Card to Be Used - Select Options

Res Card Create Date (Inquiry Date)

Res Card Start Date (Travel Date)

Reservation Date (Booking Date)

Range of dates to be used - Start with the beginning of any month and use the end of month for any 12, 24, 36, 48, 60 or 72 month period.

Select as many Travel Categories as you wish to include.

Report Sort - Options: Agency, Agents (Profile Primary Agent) or Branches

Select 'All' or one Agent

Select 'All' or one Branch (Note; If you have selected an Agent, it will use 'All' for Branches.

For Excel, you need to also select the values for either Sales or Revenue (Commissions)

If you use Excel, any Names for profiles that are color coded in ClientBase will display in that color if color is one of the 40 basic colors offered by ClientBase in its color table.

If you are using DataLink, you can change the number of Clients you wish to view.

One option selects number of clients while

The other selects percent of total Revenue.

Suggestions:

Select a Supplier.

See how many and which of your clients repeat with that Supplier.

If you switch to Trends, you can view trends for a customer for a supplier? Are they spending more money from year to year?  
IE Buying higher Categories on a ship

Uses Profile Primary Agent

Option of Including Inactive Profiles

### Client Trips By Year

ResCard Trip Start Date Between **1/1/2014** and **12/31/2018**

All Suppliers  
All  
Report - Quantity

All Travel Categories

Top **40** Clients (Quantity)

#### Total Agency

Total Agency	Year End 12/31/14	Year End 12/31/15	Year End 12/31/16	Year End 12/31/17	Year End 12/31/18	Total
<b>% of Total Revenue</b>	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
<b># of Res Cards</b>	1,068	1,107	1,254	1,127	823	5,379
<b>\$ Sales (Base Fares)</b>	5,230,799	5,614,527	5,746,509	6,285,188	5,461,039	\$ 28,338,062
<b>\$Revenue</b>	635,939	684,809	706,290	779,796	674,206	\$ 3,481,040
<b>Hard/Melissa &amp; Brian - Linda Brown</b>	1.1% 5 55,487 6,898	0.8% 4 53,095 5,314	1.7% 6 82,316 12,001	0.6% 4 49,682 4,685	1.8% 2 84,831 12,102	1.2% 21 325,412 41,000
<b>Dutc/Brent &amp; Pat - Windy Olsen CTC</b>	0.5% 3 19,179 3,194	1.5% 4 79,556 10,371	0.7% 2 38,546 4,782	0.9% 2 68,757 6,918	1.0% 2 69,312 6,745	0.9% 13 275,351 32,009
<b>Mush/Steve &amp; Rachel - Windy Olsen CTC</b>	0.7% 2 25,885 4,391	1.1% 4 51,240 7,788	0.9% 3 40,094 6,181	0.9% 2 51,836 7,288	0.3% 1 17,063 2,349	0.8% 12 186,118 27,997
<b>Sear/Mark &amp; Marlene - Donna Spring</b>	- % 1 2,336 268	0.6% 2 31,393 3,992	0.6% 3 35,338 4,406	0.9% 3 52,474 6,760	1.5% 6 81,760 10,130	0.7% 15 203,302 25,555
<b>Radt/Marti &amp; Mike - Windy Olsen CTC</b>	0.9% 1 36,513 5,933	- % - - -	0.8% 2 48,561 5,445	0.7% 2 47,838 5,405	0.8% 2 42,164 5,718	0.6% 7 \$175,076 22,500
<b>Ande/Kenneth &amp; Sheree - Jane Smith</b>	0.8% 4 35,718 4,870	1.1% 6 57,463 7,237	0.3% 3 12,361 1,900	0.6% 3 39,116 4,856	0.5% 2 23,400 3,206	0.6% 18 \$168,058 22,069
<b>Gron/Glen &amp; Shirley - Jane Smith</b>	1.5% 1 59,349 9,625	0.2% 2 24,939 1,416	0.5% 1 34,559 3,597	0.6% 1 34,762 4,933	0.2% 1 16,208 1,282	0.6% 6 \$169,816 20,854
<b>Gall/Karen &amp; Brian - Mary Marx</b>	0.7% 3 35,489 4,501	0.7% 3 38,394 5,091	0.9% 3 41,450 6,079	0.4% 2 21,718 3,084	0.2% 2 10,205 1,189	0.6% 13 \$147,256 19,943
<b>Dama/Laura - Windy Olsen CTC</b>	0.6% 4 24,140 3,805	- % - - -	- % - - -	0.3% 1 26,195 2,668	1.8% 3 93,712 12,362	0.5% 8 \$144,047 18,835
<b>Seab/Bob - Windy Olsen CTC</b>	0.4% 2 23,280 2,855	0.3% 2 15,836 2,045	0.9% 2 44,358 6,093	0.8% 3 47,728 6,027	0.1% 1 8,098 700	0.5% 10 \$139,301 17,720

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<b>Meet/James &amp; Dianna - Donna Spring</b>	0.5% 2 25,402 3,253	0.7% 2 29,357 4,673	0.4% 1 16,890 2,591	0.6% 2 29,010 4,649	0.2% 1 16,522 1,639	0.5% 8 \$ 117,181 16,805
<b>Webe/Brenda - Linda Brown</b>	0.8% 4 53,974 5,313	0.2% 1 15,074 1,676	0.4% 2 23,732 2,531	0.7% 3 53,349 5,340	0.3% 2 19,360 1,825	0.5% 12 \$ 165,489 16,685
<b>Pool/Tom &amp; Sharon - Windy Olsen CTC</b>	- % - - -	- % 1 750 -	0.5% 3 25,767 3,525	0.3% 2 18,466 2,489	1.3% 3 86,268 8,981	0.4% 9 \$ 131,251 14,995
<b>Bell/Dave &amp; Patti - Jen Auld</b>	0.6% 5 37,665 4,030	0.1% 1 6,268 772	0.8% 7 44,346 5,855	0.3% 1 13,163 2,366	0.2% 3 13,639 1,552	0.4% 17 \$ 115,081 14,573
<b>Abel/Alan - Donna Spring</b>	0.4% 5 23,798 2,836	0.4% 5 24,914 2,905	0.5% 5 31,631 3,397	0.3% 5 19,866 2,295	0.4% 4 26,616 3,019	0.4% 24 \$ 126,824 14,452
<b>Head/Charles &amp; Margie - Donna Spring</b>	- % - - -	1.0% 2 67,480 7,065	- % - - -	0.5% 2 40,514 3,738	0.4% 1 23,533 2,686	0.4% 5 \$131,527 13,489
<b>Chap/Anthony &amp; Cheryl - Donna Spring</b>	- % - - -	- % - - -	0.4% 1 21,661 2,591	1.0% 2 65,659 7,821	0.3% 3 20,863 2,266	0.4% 6 \$108,183 12,678
<b>Whit/Richard &amp; Carol - Windy Olsen CTC</b>	0.4% 4 20,779 2,543	0.3% 3 16,638 2,160	0.4% 3 16,471 2,580	0.2% 4 14,122 1,815	0.4% 2 20,218 2,660	0.3% 16 \$88,229 11,757
<b>Faur/Gunter - Windy Olsen CTC</b>	0.2% 1 6,302 1,070	0.2% 1 11,779 1,634	0.4% 1 15,211 2,686	0.5% 2 23,886 3,795	0.4% 1 15,664 2,463	0.3% 6 \$72,842 11,648
<b>Kolb/Ron &amp; Peggy - Windy Olsen CTC</b>	0.1% 2 7,136 773	0.2% 3 13,945 1,412	0.3% 3 17,833 1,953	0.4% 3 25,163 3,186	0.6% 3 36,629 4,193	0.3% 14 \$100,706 11,517
<b>Snyd/Gordon &amp; Barbara - Linda Brown</b>	1.0% 4 59,971 6,615	0.2% 1 15,764 1,577	0.3% 1 28,584 1,922	0.1% 2 5,243 655	0.1% 1 4,585 599	0.3% 9 \$114,148 11,368

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<b>Mosi/Craig &amp; Judy - Windy Olsen CTC</b>	0.3% 1 9,848 1,925	0.3% 1 18,429 2,333	0.3% 1 17,924 2,004	0.6% 1 32,401 4,874	- % - - -	0.3% 4 78,602 11,135
<b>Szor/Wayne &amp; Susan - Donna Spring</b>	- % - - -	0.1% 1 3,802 437	0.6% 1 38,720 4,029	- % - - -	0.7% 1 40,640 4,607	0.3% 3 83,162 9,073
<b>McMu/Wayne &amp; Lisa - Jen Auld</b>	- % - - -	0.3% 3 19,823 2,119	0.2% 1 10,516 1,348	0.6% 2 28,225 4,321	0.2% 1 6,198 1,022	0.3% 7 64,762 8,811
<b>Fish/Robin &amp; Budd - Linda Brown</b>	- % - - -	- % - - -	0.2% 1 8,777 1,183	0.1% 1 4,444 472	1.1% 3 58,395 7,105	0.3% 5 71,615 8,760
<b>Brow/David &amp; Elizabeth - Windy Olsen CTC</b>	0.6% 1 33,236 3,956	- % - - -	0.2% 1 11,677 1,627	- % - - -	0.4% 2 21,322 2,841	0.2% 4 66,236 8,424
<b>Butl/Roger &amp; Donna - Windy Olsen CTC</b>	0.2% 1 6,699 972	0.3% 1 12,086 1,756	0.1% 1 5,734 959	0.4% 2 21,904 3,363	0.2% 1 9,052 1,301	0.2% 6 \$55,475 8,350
<b>Au/Rita &amp; Ralph - Windy Olsen CTC</b>	0.3% 2 13,502 1,953	0.3% 2 25,644 2,309	- % - - -	0.5% 3 24,512 4,077	- % - - -	0.2% 7 \$63,658 8,339
<b>Lavi/Todd &amp; Suzy - Mary Marx</b>	0.5% 2 26,182 2,941	- % - - -	0.3% 1 16,858 2,212	- % - - -	0.5% 2 22,084 3,056	0.2% 5 \$65,124 8,208
<b>Mcco/David - Linda Brown</b>	0.6% 2 26,875 3,958	0.2% 1 12,226 1,467	- % - - -	0.3% 1 19,727 2,685	- % - - -	0.2% 4 \$58,828 8,111
<b>Riel/Joe &amp; Sally - Windy Olsen CTC</b>	0.4% 2 12,421 2,486	0.2% 2 12,517 1,181	0.1% 2 9,919 1,047	0.2% 3 13,428 1,379	0.3% 2 14,396 1,882	0.2% 11 \$62,681 7,976
<b>Tarrant/Bill &amp; Carrie - Linda Brown</b>	- % - - -	- % - - -	- % - - -	0.1% 1 9,623 1,166	1.0% 1 57,703 6,796	0.2% 2 \$67,326 7,963

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<b>Gray/Cynthia - Linda Brown</b>	0.2% 1 8,082 1,441	0.3% 1 14,008 1,854	- % - - -	0.6% 2 27,401 4,655	- % - - -	0.2% 4 49,491 7,950
<b>Ever/Bob &amp; Jenny - Mary Marx</b>	0.6% 1 22,313 3,628	0.1% 1 4,258 637	- % - - -	- % - - -	0.5% 1 21,684 3,515	0.2% 3 48,255 7,780
<b>Stiv/Cookie - Jane Smith</b>	0.6% 5 34,769 4,077	- % - - -	0.5% 1 23,787 3,515	- % - - -	- % - - -	0.2% 6 58,556 7,592
<b>Slem/Tom &amp; Jody - Jane Smith</b>	- % - - -	0.4% 2 28,820 2,900	0.3% 2 19,274 1,998	0.2% 1 11,168 1,302	0.2% 1 12,497 1,375	0.2% 6 71,759 7,575
<b>Albe/Todd &amp; Dawn - Linda Brown</b>	0.3% 2 15,171 1,668	0.3% 4 23,042 2,259	0.2% 1 17,346 1,614	- % 2 8,252 371	0.2% 1 11,804 1,636	0.2% 10 75,615 7,548
<b>Garr/Peggy - Linda Brown</b>	- % - - -	- % - - -	- % - - -	0.5% 1 31,546 3,960	0.5% 1 32,783 3,535	0.2% 2 \$64,329 7,494
<b>Stil/John - Donna Spring</b>	0.1% 1 4,028 459	0.4% 1 16,916 2,462	0.1% 1 5,472 703	0.2% 1 9,898 1,281	0.4% 3 26,334 2,383	0.2% 7 \$62,649 7,288
<b>Pres/Jeff - Petra</b>	- % - - -	- % - - -	0.1% 1 6,368 855	0.3% 1 17,803 2,287	0.6% 2 35,047 4,133	0.2% 4 \$59,218 7,275
<b>Others</b>	83.9% 994 4,465,269 533,702	87.0% 1,040 4,869,070 595,968	85.4% 1,187 4,934,428 603,083	83.7% 1,054 5,276,307 652,834	80.3% 755 4,360,449 541,352	84.1% 5,030 \$23,905,522 2,926,939