Client Base Web

An Overview of the Basics & Features Available
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ClientBase Web
An Overview of the Basics and Features Available

ClientBase is a tool for selling travel. It’s an easy-to-use marketing database system developed specifically for Travel Counsellors. The program gives you flexibility in maintaining the marketing and travel demographic components of your clientele. Not just another software program, ClientBase represents an evolving solution to your Customer Relationship Management (CRM).

ClientBase Web - also known as ClientBase Browser (CBB) is the Web version of the ClientBase Program.

At Maritime Travel we use ClientBase to:

- Securely store our Clients’ Personal Information & Travel Preferences
- Transfer this information to our Reservation & Accounting Systems
- Extract information for Marketing & Reporting Purposes

In this Reference Manual you will become familiar with the common work areas of ClientBase Web, and learn some useful ‘Tips & Tricks’.
Getting Started

- We access ClientBase Web through SalesDesk.
- On your Desktop look for the ‘Yellow S’ and Double Click’.

- This will open up SalesDesk and display the Home Screen.
• Once in SalesDesk, hover your cursor over ‘Links’ – a drop down menu will appear.
• From the drop down menu, ‘click’ **ClientBase Web**.

• The ClientBase Profiles Home Screen will be displayed.
Searching for Client Profiles

- Client information is stored in ‘Client Household Profiles’.
- ClientBase gives us a large selection of search criteria. The home page automatically displays the ‘Simple Search’ Option.
  - We can search by Profile Type, Profile Name/Company, Last Name, Family/Traveller Name, Phone, Fax, E-mail, Web Site, Family/Traveller Phone, Interface ID, City, Province/State, Postal/Zip Code, Branch and Primary Agent.

- Should you choose, you have the ability to narrow your search by using up to two search criteria, for example – Last Name and Primary Agent – which would give you a listing of all Client Profiles, with the last name entered under a specific counsellor.
• Using the first drop down menu, select ‘Last Name’, and type in Smith.
• Using the second drop down menu, select ‘Primary Agent’, and type in Gail.
  o If there are more than one ‘Gail’ to choose from, a drop down menu will appear – select the counsellor you are searching for.
  
• Click ‘Find’.

• A listing of all Clients, with the Last Name ‘Smith’ and Primary Agent ‘Gail Bodnaruk’ will be displayed.
• Our search has given us 11 profiles that match our criteria.

Helpful Tip

Click on 'Count' to see how many profiles met your search criteria.
Accessing Individual Profiles

- Once your 'Simple Search' Query is displayed, click on 'View' to access your Client’s Individual Profile.
  - Profiles with a Profile Type ‘L’ are Leisure, ‘C’ are Corporate, and ‘A’ are Agent.

- Every Counsellor automatically has an ‘Agent’ Profile in ClientBase created by our IT Department – this profile will give you your unique TRAMS Counsellor number.
Viewing Your Client’s Profile

- Client Profiles open at the General Info Page.
- Profiles are divided into an additional 12 Sections with links under the ‘More about’ side bar located down the left hand side of the page.
- Client’s Address, Communications (phone, fax & e-mail), and Special Dates are listed on the General Info Page.
- The Additional Info & Profile Status Sections provide us with ‘in-house’ information including the Profile Name & Status, Interface ID, Home Branch, Primary Agent, Profile Creation Date, Last Modification Date, etc.

- Information can easily be added or updated by clicking ‘Add’ or ‘Edit’
- To close your profile and return to the query page, simply click ‘Close’, located at the bottom of the ‘More About’ side bar located on the left hand side of the page.
To update your client’s address, click ‘Edit’ in the Address Section on the General Info Page.

An Edit Screen will be displayed.

- Note the ‘Edit Address’ in the top right hand corner.

After updating, click ‘Save’, you will then be taken back to the General Info Page and your updated information will be saved and displayed.
• To add a new form of communication, click ‘Add’ in the Communications Section on the General Info Page.
• A New Blank Communication Page will be displayed.
  o Note 'New Communication' in the top right hand corner.

• From the drop down menus select the passenger the new communication is associated with (optional), and the type of communication being added.

• Enter your phone or fax number, e-mail or Web address into the Entry Box.
• Add your Description.
After adding your communication, click ‘Save’, you will then be taken back to the General Info Page and your new information will be saved and displayed.
The most common Profile Sections used are:

- Remarks
- Marketing Codes
- Family Members
- Credit Cards
- Loyalty Programs
- Travel History
- Attachments

Let’s take a look at each section...

**Remarks**

- From the ‘More About’ side bar, located on the left hand side of the page, click ‘Remarks’. The Remarks section will be displayed.
- Remarks can be useful to ‘flag’ important information that you want to ‘catch your attention’. Although remarks are entered into a separate section in ClientBase, they are displayed on the General Info Page as well.

- To add, edit, or delete remarks, click ‘Edit’.
• The ‘Edit Remarks’ page will be displayed.
  o Note ‘Edit Remarks’ in the top right hand corner.
• Once you have added, updated or deleted your remarks, click ‘Save’.
• Your Remarks will be saved and the Remarks Page will be redisplayed.

Marketing Codes

• From the ‘More About’ side bar, located on the left hand side of the page, click ‘Marketing Codes’. The Marketing Codes section will be displayed.
• Marketing Codes are used to ‘Bucket List’ our clients enabling us to pull Marketing Lists. There are many to choose from, so it’s best to start with just a few.
• To add a Marketing Code, click any of the ‘Edit’ buttons located down the right hand side of the page.
- The ‘Expanded’ Marketing Code Selection Page will be displayed. All you need to do is ‘click’ the boxes you wish to select, and click ‘Save’.
- Your Marketing Codes will be saved, and the Marketing Page will be redisplayed with your selections.
- As a **Best Practice**, for New Counsellors, we suggest all profiles have section #3 ‘With Whom?’ and section #7 ‘MLM’ selected.

### Helpful Tip

#### Marketing #3 With Whom?
**Select one of the MLM Codes:**
- MLM –Single
- MLM –DINKS (Double Income, No Kids)
- MLM-Family
- MLM-Empty Nester
- MLM-Senior

#### Marketing #7 MLM
**Select the Total Household Annual Income:**
- A Client - $750 and over
- B Client - $250 - $749
- C Client - $249 and under
Family Members

- From the ‘More About’ side bar, located on the left hand side of the page, click ‘Family Members’. The Family Members section will be displayed.
- The Family Members Section is where we store all Family/Household Members’ Personal Information & Travel Preferences.
- The Page opens up in the ‘Summary View’.
- You can enlarge the ‘Summary View’ by clicking ‘Expand Results’.
• An expanded view will be displayed.
• Similar to the 'Summary View', you can use the scroll bars to view additional information.
• You also have the option to display a 'Detailed' View.
• From the Summary View, click 'Switch to Detailed View'.
• A Detailed View of all Family/Household Members will be displayed.

• To return to the 'Summary View', click 'Switch to Summary View'.
- Individual Client Profiles can be easily displayed by clicking 'View' from the Summary, Expanded or Detailed View Family Member Screens.
• The Selected Client Profile will be displayed.

• Information can be added or updated by clicking the 'Add' or 'Edit' Buttons located throughout the Client Profile.
• Remember to ‘Save’ your changes.
Credit Cards

- ClientBase gives us a Safe & Secure area to store our Client’s Credit Card information.
- From the ‘More About’ side bar, located on the left hand side of the page, click ‘Credit Cards’. The Credit Card section will be displayed at the Summary View.
- You have the option to switch to the Detailed and Expanded Views.
- To view you client’s credit card number, or update their information, click ‘Edit’.
- An Edit Screen will be displayed.
  - Note the **Edit Card** in the top right hand corner.
- Click the 'Lock' beside the encrypted Credit Card Number.

- A Dialogue Box will be displayed asking 'Do you really need to see the full credit card number? Click 'Yes'.
• Your client’s Credit Card Number will now be displayed, click ‘Cancel’ to close.
• If you are updating information, make the necessary changes and click ‘Save’.
• Your updates will be saved and the Credit Card Page will be redisplayed.

Helpful Tip
A great place to store your Client’s Credit Card CVV Code is in Remarks area of the Credit Card Section.

• To add a Credit Card, from the Credit Card Section, click ‘Add’.
• A New Blank Credit Card Page will be displayed.
  o Note ‘New Card’ in the top right hand corner.

• From the drop down menus select the passenger associated with the new credit card (optional), the type of credit card being added, and expiry date.
• Enter the Card Number, Name on the Card & Issuing Bank.
• Enter any Remarks – Free flow (e.g. CVV Code).
• Click ‘Save’.
• Your new Credit Card information will be saved and the Credit Card Page will be redisplayed.

Helpful Tip

If you select a Client Name when entering a Credit Card or Phone Number, this information becomes associated to the Specific Client, instead of the Household.

If you would like a Credit Card or Phone Number to be associated to the Household, leave the name blank.
Loyalty Programs

- All of your Client’s Loyalty & Frequent Flyer/Traveller Information can be stored in ClientBase.
- From the 'More About' side bar, located on the left hand side of the page, click 'Loyalty Programs’. The Loyalty Programs section will be displayed at the Summary View.
- You have the option to switch to the Detailed andExpanded Views.
- To update your client’s Loyalty Program information, click ‘Edit’.
- An Edit Screen will be displayed.
  - Note the ‘Edit Card’ in the top right hand corner.
- Make your necessary changes, click ‘Save’.
- Your Loyalty Program Information will be saved and the Loyalty Programs Page will be redisplayed with your updated information.
• To add a Frequent Flyer or Traveller Number, from the Loyalty Programs Section, click ‘Add’ (note – in this example we are looking at the Detailed View).

  A New Blank Loyalty Program Page will be displayed.
  o Note ‘New Card’ in the top right hand corner.

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• From the drop down menus select the passenger associated with the Loyalty Card (required), the Program Type (Car, Cruise, Frequent Flyer, Hotel or Other), Supplier Code, and expiry date (optional).
• Enter the Card Number & Name on the Card.
• ‘Issued By’ is optional, but recommended when selecting ‘Other’.
• Add any Remarks.
• Click ‘Save’.

• Your Loyalty Program Information will be saved and the Loyalty Program Page will be redisplayed with your new information.

Helpful Tip
In addition to Frequent Flyer & Traveller Programs, the Loyalty Programs Section is a great place for Counsellors to store their ACTA & IATA ID Card Numbers.
Travel History

- ClientBase stores all of our Client’s Past Invoiced Travel in the Travel History Section.
- From the ‘More About’ side bar, located on the left hand side of the page, click ‘Travel History’. The Travel History section will be displayed at the Summary View.
- You have the option to switch to the Detailed and Expanded Views.

- The default Summary Page shows all invoices listed chronologically, most recent on top.

- ClientBase has a number of filters available from the Summary & Detailed View Sections, which enable you to narrow your search by selecting or deseleting certain Travel Types (Air, Hotel, Car, Cruise, Tour, Transport, Insurance, Service Fee & Miscellaneous).
- Once you have selected your filters, click ‘Find’.
- Your new search criteria will be displayed.
• In addition to Invoice Issue Date, you have the option to sort by Departure Date, Travel Category, Passenger Name, Invoice#, Invoice Type, Invoice Status, Ticket# and Confirmation# - this example shows the Travel History ‘Detailed View’.
• To modify your search, select your sort criteria (e.g. Invoice#) and click ‘Find’.
• Your chosen sort will now be displayed.
• In this example we are looking at a ‘Sort’ by Passenger Name.
• After completing the sort, we have clicked ‘Expanded View’.

• Click ‘Close’ to return to the Summary View.
In this example, we are searching for Invoice# 85016054.
First we type `CTRL+F` enter.
The Find Tool Bar is displayed, type in the invoice# – as you type, your matches start to highlight in yellow, the first already ‘selected’ for you (in blue).
Note – the number of ‘matches’ will be displayed in the Tool Bar.
Use the ‘Previous & Next’ Buttons to move through your query.

Helpful Tip
A quick and simple way to ‘Search’ is to use the entry `CTRL+F` ‘enter’.
A ‘Find’ Tool Bar will appear in the Top Left Hand Corner of your Internet Browser.
Type what you are searching for – e.g. Invoice or Confirmation#, Passenger Name, Supplier, etc.
Any Matches will be ‘Highlighted in Yellow’, with the first ‘selected’ (in blue). Use the ‘Previous & Next’ Buttons to move through your query.
Attachments

- ClientBase provides us with the ability to upload documents and attach them to our Client’s Profile (e.g. PDF’s, Word & Excel Documents, etc.).
- This is a Safe & Secure way to save Client’s Personal & Confidential Information including copies of Passports, Driver’s Licences, Credit Cards, etc.
- From the ‘More About’ side bar, located on the left hand side of the page, click ‘Attachments’. The Attachment section will be displayed at the Summary View.
- You have the option to switch to the Detailed and Expanded Views.
- To view your attachments, click ‘Open’.
- Your Document will be displayed.
To add a Document to your Client’s Profile, click ‘Add’.

- A New Blank Attachment Page will be displayed.
  - Note ‘New Attachment’ in the top right hand corner.

- Click ‘Browse’.
- Locate your Document on your Computer.
- ‘Double Click’ on your Document.

- You will return to the ‘New Attachment’ Page, and your Document’s File Directory Name will appear in the ‘Browse for Attachment’ Section.
- Add a Description (e.g. John Smith’s Passport), click ‘Save’.
- Your Document will now be saved and the Attachment Page will be redisplayed with your uploaded information.
Creating a New Client Profile

- From the ClientBase Profile Home Page, hover your cursor over ‘Create Profile’ – a drop down menu will appear.
- From the drop down menu, ‘click’ Leisure.

- A New Blank ‘Create Leisure’ Page will be displayed.
• It’s important to ensure the information in your Client Profile is as accurate and detailed as possible.
• The minimum requirements (highlighted in orange) are Last Name, First Name, Phone and Interface ID – however a Profile missing an address and/or e-mail makes it next to impossible for us to reach out to our clients and provide the High Standard of Customer Service Maritime Travel has come to be known by.
• Let’s take a look at the four sections used to create a profile...

**General Info**

• Enter your client’s ‘Legal’ Name (as it appears on their passport) – remember you can always update this information at a later date).
• Using the drop down menu, select a Courtesy Title (Mr., Mrs., Mstr., Miss, etc.).
• If your client has a preferred name, enter it in the Salutation Field (e.g. the name you would use to greet your client).

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vogl</td>
<td>Susan</td>
<td>Mary</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Courtesy Title</th>
<th>Salutation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mrs.</td>
<td>Sue</td>
</tr>
</tbody>
</table>

**Address**

• Enter your client’s Primary Address.

**Communications**

• Enter your client’s Primary Phone Number.
  o Remember the ‘Description’ must be Apollo Format – for a residence phone ‘in Vancouver’ you would enter YVRR.
• Enter your client’s E-mail Address.
  o By entering your client’s e-mail address this will ensure they receive our ‘Holiday Club’ Newsletter.

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**Helpful Tip**

If you enter your client’s e-mail address, not only will they receive our Holiday Club Newsletter, but it will come from you.
**Additional Info**

- At Maritime Travel, your client’s Interface ID is their phone number. This field can be left blank as it will auto populate from your phone field.
- Providing you are logged into the system using your User ID, the Primary Agent & Branch Number will auto populate.
- Click ‘Save’.

- Your client’s Profile has been created and will be displayed at the **General Info** Page.
- Information can easily be added or updated by clicking ‘Add’ or ‘Edit’.
- To close your profile, simply click ‘Close’, located at the bottom of the ‘More About’ side bar located on the left hand side of the page.

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**Helpful Tip**

You have the ability to create profiles for your Team Members and other Maritime Travel Branches’ clients.

To create a profile for a Team Member, type their First Name in the Primary Agent Field. Using the Drop Down Menu, find the Counsellor’s Name and ‘Click’.

To create a Profile for another Maritime Travel Branch (in addition to selecting the Primary Agent) using the Drop Down Menu under Branch No., select the appropriate Branch.

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**Helpful Tip**

What is my Client’s Profile Number?

Similar to your Client’s Interface ID, their Profile Number is unique to their Profile. Unlike an Interface ID Number, which can be changed, your Client’s Profile Number will always remain the same.

Profile Numbers are used by our IT Department and Branch Accounting.
Merge to PNR

- ClientBase provides us with the ability to transfer our client’s information from their Profile to our GDS ‘Apollo’.
- From the **General Info** Page of your Client’s Profile, click ‘PNR’.

A **PNR Builder** page will be displayed.
- Ensure that your Reservation Systems is selected as ‘Apollo API’.
- Click ‘Next’.
• The next **PNR Builder** page is displayed.
• The ‘greyed’ area displays the minimum required PNR default entries.
• Below the default entries is the section where you make your selections – e.g. Who is Travelling, E-mail, Form of Payment, etc.
• ‘Click’ on the boxes beside the fields you would like to move over to your PNR.
• When you select a Passenger, additional Fields associated specifically to that client will be displayed.
• Once you have made your selections click ‘Send to PNR’.

A Dialogue Box will be displayed ‘PNR sent to Apollo’.
• Click ‘OK’.

Helpful Tip
Ensure you are logged into Apollo.
If you are not logged in, your entries will not transfer over.
• If you would like to View your entries prior to sending them to your PNR, click ‘Preview’.

• A Preview Screen will appear.
• From the Preview Screen, you can also ‘Send to PNR’.

• Go to Apollo, your entries will be displayed.
• If you’d like to view your entries in PNR format, enter *R in Apollo.
• Your PNR will be redisplayed.
• You are now ready to continue and complete your PNR.

**Helpful Tip**

When booking **Live GDS Air**, in order for your Secure Flight Details to transfer over properly from ClientBase Web to Apollo, you will need to **Book your Flights in Apollo First** and then do the ‘Merge to PNR’ from ClientBase Web.
Tips & Tricks

Action Menu Icon (Gear) Shortcut

- Whenever you see the Action Menu Icon, this indicates that ClientBase has a Shortcut Menu available.
- Shortcut Menus can be found on the ClientBase Web Results Query Page and Family Members Section.
- ‘Click’ on the Gear Icon and a Shortcut Menu will be displayed.

- From the Results Query Page, the areas you have ‘Quick Links’ to that we covered in this manual are View & Merge to PNR.

- From the Family Members Section, the area you have a ‘Quick Link’ to that we covered in this manual is Edit.
E-mail Link

- From your Client’s Profile **General Info Section**, you have a ‘Quick Link’ to their Primary E-mail.
- Click on the E-Mail Address.

- Outlook will automatically open with a ‘New Message’ addressed to your client.
TRAMS History Link

- From your Client’s Profile **General Info Section**, you have a ‘Quick Link’ to their Travel History.
- Click on the ‘TRAMS/Engine’ Icon.

- You will automatically be taken to your client’s Travel History Page.

**Helpful Tip**

If your client does not have any Travel History, this Icon will be displayed as an Empty Box.'