

Introduction to ClientBase

What is ClientBase Online?

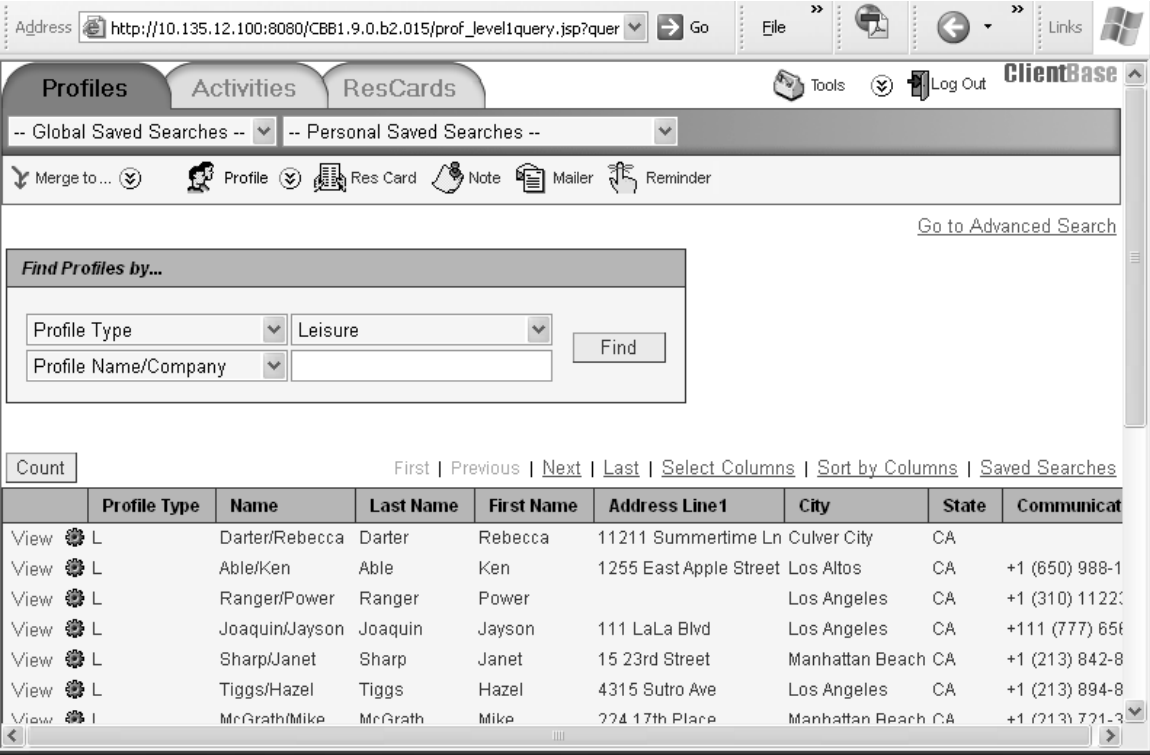
ClientBase is a tool for selling travel. It's an easy-to-use marketing database system developed specifically for travel agents. The program gives you flexibility in maintaining the marketing and travel demographic components of your clientele. Not just another software program, ClientBase represents an evolving solution to your customer relationship management (CRM) needs an automated reservation card feature.

ClientBase Main Screen

The first screen to appear after logging on is the main screen. To become better acquainted with the ClientBase features, it may be helpful to think of the screen as being divided into six sections:

- 1. Browser Items
- 2. File Manager
- 3. Toolbar
- 4. Navigation Bar
- 5. Search (Query) Filters
- 6. Search (Query) Results

Meet the Browser Items



Located at the top of the screen are your browser's items. Depending on how your Internet Explorer is set up, these items look different. They usually include a browser File Menu, Toolbar, and an Address area.

Meet the File Managers (Profiles & Activities)

The File Managers consists of **Profiles and Activities**.

Profiles provide quick access to vital information about your clients (Leisure or Corporate), Service Provider, Vendor, Agent and Other profiles (non-travel related entities, such as the electric company or landlord). From this area *locate*, *add*, or *modify* profile records.

Activities allow you to easily manage activity data (Notes, Reminders and Mailers) and provides query filters and results listed by Activity.



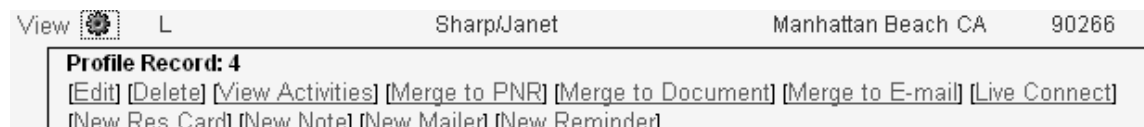
Find Profiles by...

Profile Type	Leisure	Find
Profile Name/Company		

Profiles

When clicking *Profiles*, search (or query) filters entered by default appear or select a link which contains a stored set of query fields (*Global or Personal Saved Searches*) from the drop-down menus. You can also use a simple or advanced search to enter a custom search. (To view all profiles, click *Find*.)

The *Global Saved Searches* represent a set of search filters and column arrangements that have been saved and named. With a single click of the mouse from these drop-down menus, these links automatically complete search filters and display results after clicking *Find*. The *Personal Saved Searches* represent folders that have been saved by you and can only be seen and utilized on your own login.



To retrieve a specific profile, click *View* next to the entry or the action menu icon (gear). This icon is displayed to the right of *View* and is listed for each record in the query. It has been designed to allow you to perform a variety of actions for that one record without having to open the record first – saving you a few extra clicks of the mouse. Click the icon and the following options appear:

From Profiles Search Results for Selected Profile:

Edit (Leisure, Corporate, Vendor, Agent or Other): Takes you directly to the *Edit Additional Info* section of the selected profile for modifying without having to first view the profile and selecting *Edit Additional Info*.

Delete: Delete a profile. The system first prompts with the message, *Delete this Profile? Yes or No*.

If *Yes* is selected, then the system checks to see if any Invoices, Payments, Activities or Inventory exist for the profile. If not, then the profile is deleted. If Invoices, Payments, Activities or Inventory exist for the profile, the system prompts that these records must be deleted before the profile can be deleted.

Note: Profiles can be set to Inactive as an alternative to deleting.

View Activities: Take you directly to the activities tab for the selected profile without having to open the profile first.

Merge to PNR: Activates *Merge to PNR* for the selected profile without having to open the profile first.

Merge to Document: Activates *Merge to Document Template* for the selected profile.

Merge to E-mail: Activates *Merge to E-mail* for the selected profile.

New Note: Activates *Note* creation screen for the selected profile.

New Mailer: Activates *creation screen for the selected profile.*

New Reminder: Activates *Reminder* creation screen for the selected profile.

A new profile can be created at any time in *Profiles or Activities* clicking on the Profile icon in the toolbar, and selecting the desired profile type (Leisure, Corporate, Service Provider, Vendor, Agent or Other).



Create a New Profile

Activities

When opening *Activities*, search filters are entered by default or you may select a link which contains a stored set of search fields (*Global* or *Personal Saved Searches*) from the drop-down menus. You can also use the simple or advanced filters to enter a custom search. (Clicking *Find* displays all activities.)



All Reminders

Find Activities by...

Login Name Select

From Date To Date

Create a new **Note**, **Mailer** or **Reminder**

The Global Saved Searches represent a set of search filters and column arrangements that have been saved and named. With a single click of the mouse from these drop-down menus, these links automatically complete search filters and display results after clicking Find. The Personal Saved Searches represent folders that have been saved by you and can only be seen and utilized on your own login.

To retrieve a specific activity, click View next to the entry or the action menu icon (gear).

Edit takes you directly into the activity, or Go to Profile takes you directly into the profile for which the activity was created. A new activity can be created at any time in Profiles or Activities by clicking the Note, Mailer or Reminder icon on the toolbar.

Meet the Toolbar

The toolbar is made up of links to frequently used features. Directly above the toolbar is the *Login Name* information that identifies what ClientBase user is presently logged in.



MERGE to ICON

Merge to Doc: Launch a Document Template (setup by default) from the results of a query into Wordpad, MS Word, Open Office, etc. to view, edit and print the document with all fields merged. You can also *Merge to Doc* inside a client profile. Please see section on *Putting Your Profiles to Work for You* for exact directions on how this is done.

Merge to E-mail: Launch an E-mail from the results of a query. Please see section *Putting Your Profiles to Work for You* for exact directions on how this is done.

Merge to File: Export the results of a query for use in other applications such as MS Word, Excel, etc. to run labels or reports, and print from your local workstation. Arrange and sort columns as desired before printing.

Merge to Printer: Print the results of the query from the Profile.

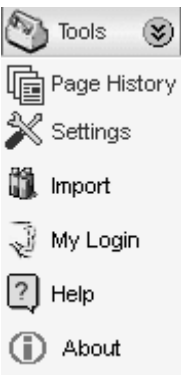
PROFILE ICON: Create a new *Leisure, Corporate, Service Provider, Vendor, Agent* or *Other* profile.

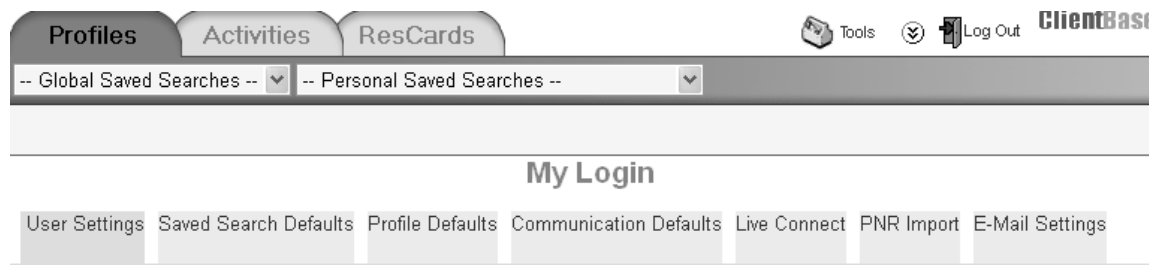
NOTE ICON: Create a note from the results of a query. Please see section *An In-Depth Look at Activities* for exact directions on how this is done.

MAILER ICON: Create a mailer from the results of a query. Please see section *An In-Depth Look at Activities* for exact directions on how this is done.

REMINDER ICON: Create a reminder from the results of a query. Please see section *An In-Depth Look at Activities* for exact directions on how this is done.

TOOLS ICON:

 <ul style="list-style-type: none">ToolsPage HistorySettingsImportMy LoginHelpAbout	<p>Page History: The page history area "remembers" the last places you have navigated to in the program. To quickly hop back into a recently visited area, simple click on that link.</p> <p>Settings: Access the ability to customize <i>Agency Settings, Branch Settings, and User Logins</i>.</p> <p>Import: Import data into ClientBase in the form of an ASCII (.txt) file. Directions are in section entitled <i>Set Up to Use ClientBase</i>.</p> <p>My Login: By going to Tools My Login, each user has the ability to update their own default settings including <i>Query Folder Defaults, Profile Defaults, Communication Defaults, PNR Import Settings, E-mail Settings, as well as User Name, Title, E-mail and Login Password</i>.</p>
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User Settings: Only the User Name, Title, E-mail and Password can be changed from this area.

Query Folder Defaults: Each file manager (Profile and Activity) comes with a default set of folders, which represent a stored set of search filters. In addition to the default folders, your agency and agents can create their own custom folders. This area of the user login allows you to identify which folder should be opened by default (within each manager) when first signing into ClientBase. Choose from the drop-down menu the types of transactions you want to see when first entering ClientBase with this login.

Profile Defaults: Each profile type is made up of several links information. Under Profile Defaults, select which link fist appears when viewing each type of profile. For example, you may to see marketing information first thing, every time they retrieve a leisure client profile. If so, click the down arrow next to Leisure and select Marketing. You can select any link for any profile type.

Communication Defaults: The agency is no longer confined to its four walls. With so many outside agents and employees working from distant locations, customers come with many different area codes and even from different countries. Agent users have the opportunity to save default phone information as part of their log in. **Note:** If this screen is left blank, then information that is listed under Agency Settings (Global Defaults) is used.

PNR Import - If you are using PNR Import, you may be asked to use this area. See *An In-Depth Look at PNR import* for more details.

E-mail Settings

ClientBase uses the SMTP (Simple Messaging Text Protocol) to send e-mails. Complete the *User Login SMTP Settings* obtained from the entity responsible for maintaining your mail server (ISP).

IMPORTANT: Inquire if your ISP SMTP allows remote relaying services with authentication. ClientBase does **not** yet support the SSL platform.

From E-Mail Address: Enter the e-mail address for the user login you are setting up. The address entered here appears as the from address for all e-mails sent from this user. If you wish to change this address frequently, do so at the e-mail level when you are sending it out.

In the *From E-Mail* field, if you type **joyce@trams.com** and a message is sent, you see the From field saying **joyce@trams.com**. Some people prefer it to look like this instead, **Joyce Smith**. To have it appear like this, type **Joyce Smith<joyce@trams.com>** instead of just **joyce@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>**.

Outgoing Mail Server (SMTP): Enter the 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 e-mail 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.

Authentication Type: Set to *Default*, a setting used to authenticate your connection to the SMTP mail server by forcing a USER name and password.

None: If your agency is hosting your own e-mail server and the network login has been configured to handle the authentication to the SMTP Server automatically, set this field to *None*.

E-Mail Account Login and Password: Use when *Login Type* is set to *Default*. Enter your E-Mail account login and password here.

Click *Save*.

HELP: Provides on-line program topics that explain different areas of the program.

ABOUT: Clicking About provides you with further details on the ClientBase configuration including *Application Version, Database Type (IB or Oracle) and version, Agency Serial #, Expiration Date and Max # of Simultaneous Users, and Private Label Version*.

LOG OUT ICON: Returns user to the *Sign In* area.

Meet the Navigation Bar

The Navigation Bar provides a means to jump to various profiles in the search results screen by using *First, Previous, Next* and *Last*. To obtain a number of entries in the results of a search, click *Count*. Also on this bar are *Select Columns, Sort by Columns, and Saved Searches*.

	Count	Profile Type	Name	Last Name	First Name	Address Line1	City	State	Communicati
View	1	L	Darter/Rebecca	Darter	Rebecca	11211 Summertime Ln	Culver City	CA	
View	1	L	Able/Ken	Able	Ken	1255 East Apple Street	Los Altos	CA	+1 (650) 988-1
View	1	L	Ranger/Power	Ranger	Power		Los Angeles	CA	+1 (310) 11223
View	1	L	Joaquin/Jayson	Joaquin	Jayson	111 LaLa Blvd	Los Angeles	CA	+111 (777) 656

Select Columns

Click *Select Columns* to choose columns displayed in the search results screen.

Fields Available

- ALTERNATEADDRTABLE.Address Line1
- ALTERNATEADDRTABLE.Address Line2
- ALTERNATEADDRTABLE.Address No
- ALTERNATEADDRTABLE.Apt/Suite
- ALTERNATEADDRTABLE.City
- ALTERNATEADDRTABLE.Country
- ALTERNATEADDRTABLE.Description
- ALTERNATEADDRTABLE.State
- ALTERNATEADDRTABLE.Zip Code
- BILLTOADDRTABLE.Address Line1
- BILLTOADDRTABLE.Address Line2
- BILLTOADDRTABLE.Address No
- BILLTOADDRTABLE.Apt/Suite

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Fields in Columns

- PROFILE.Profile Type
- PROFILE.Name
- PROFILE.Last Name
- PROFILE.First Name
- PRIMARYADDRTABLE.Address Line1
- PRIMARYADDRTABLE.City
- PRIMARYADDRTABLE.State
- PRIMARYPHONETABLE.Communication Entry
- PROFILE.Interface ID

To change a column, move the highlighted column over to the other side by using the > or < arrow. By using the shift key and mouse, select as many consecutive entries as you want to move; by using the control key and your mouse, select non-consecutive entries to move. Use the >> or << arrows to move all columns at one time over to the other side. Use the up and down **arrow** buttons to order your selections. Click *OK* to save, and *Cancel* to abort.

Sort by Columns

Click *Sort by Columns* to sort columns in the search results screen. Sort up to 3 columns in ascending or descending order, and click *OK* to save, or *Cancel* to abort.

Saved Searches

Click *Saved Searches* to *View* an existing *Global* or *Personal* saved search. If you have been granted permission, you are also able to *Replace*, *Rename*, or *Delete* a saved query or create a new brand new one. See *Using the Profile Manager to Manage Your Profiles* for more details.

Meet the Search Filters

Your database holds a wealth of information on your customers - marketing activities, communication and address information, family/employee preferences, and more. This information is of little value unless you can quickly and easily access the data you need. The search (query) feature provides filters to quickly sift through your data to match your required search criteria.

You have the ability to do simple or complex searches based on the selected query filters.

Simple Search

Quickly locate a profile or a group of profiles by simply completing one or two search filters in the simple search area. The drop-down field to the left identifies what you want to search by, and the blank field to the right provides an area to type in search data. If you choose to use both fields, then the criteria is strung together with an "and", not an "or", and only those profiles that meet both query fields are displayed as a match. For example, if you are looking for an leisure client named Gary Schaefer, set the first

field to Profile Type, and select *Leisure*, then set the second field to Last Name and enter "sch" (the first few letters of the client's last name). Click *Find*.

All leisure clients with the last name starting with "sch" appear in the results area.



Find Profiles by...

Profile Type

Profile Name/Company

Advanced Search

Advanced Search provides additional filters that allow you to more narrowly define what you are looking for. Search filters are selected by clicking *Go to Advanced Search*, then *Enter Data to Search by*, and completing as many of the search fields as desired in the *General Info*, *Marketing*, *Activities*, *Family/Employee* or *More Field* links. Each field selected is strung together with an "and" that more narrowly defines the search. For example, you have just received a hot cruise special to Europe and want to get a number of all past and potential cruise clients interested in Europe and living in the 90045 zip code to see if you should do a mailing. Select *Leisure* under *Profile Type* ;"90045" in the *Zip Code* field; "Europe" and "Cruise" under *Marketing* categories and click *OK*. You have selected the filters to search your database for all leisure clients who expressed an interest in cruising and want to go to Europe and live in the 90045 zip code area. When you click *OK*, all clients in the database meeting the search criteria are displayed on the results screen .

Profile Identity

Profile Type

Leisure Vendor Agent

Corporate Service Provider Other

Profile Name

Profile Number

From through

General Info

- Marketing
- Activities
- Family/Employee
- Res Card
- More Fields

Advanced Query Links

Note: Always reset when running a fresh query!

Meet the Search Results

The Search Results Screen displays only those records that meet the search criteria you entered in the search filters. In *Profiles*, all results are identified by type of Profile: *Leisure*, *Corporate*, *Service Provider*, *Vendor*, *Agent*, or *Other*. In this example, the query filters were entered from *Profiles* and set to Profile Type of *Leisure*, and a few letters of the Last Name, *sch*. After clicking *Find*, the search results displays all leisure clients in the database whose last name begin with *sch*. To select a record appearing within the results

screen, click *View* to go to the profile, or click the action menu icon (gear) to activate the following items for this profile only: *Edit*, *View Activities*, *Merge to PNR*, *Merge to Document*, *Merge to E-mail*, *create a Note*, *Mailer* or *Reminder*.

Profiles Activities ResCards
Tools Log Out **ClientBase**
online

-- Global Saved Searches -- -- Personal Saved Searches --

Merge to... Profile Res Card Note Mailer Reminder

[Go to Advanced Search](#)

Find Profiles by...

Profile Type Leisure
 Profile Name/Company sch Find

Count First | Previous | Next | Last | [Select Columns](#) | [Sort by Columns](#) | [Saved Searches](#)

	Profile Type ^	Name	Address Line 1	City	State	Zip Code	Communication Entry
View	L	Schroeder/Nancy	3116 Manhattan Ave.	Manhattan Beach	CA	90266	
View	L	Schafer/Gary					
View	L	Schroeder/Nancy					

Client Profiles

After reviewing this document you should be able to setting up, maintaining and using client profiles.

Types of Client Profiles

There are two types of client profiles in ClientBase - Leisure and Corporate. A Leisure profile is created for each leisure client's household. A client profile holds any number of family members. For example, an agency created an leisure profile for Mr. & Mrs. John Smith. The family members are John, the primary contact; Karen, his wife; James, his son; and Jesse, his daughter, and are included as part of the Smith profile under the link, *Family Members*. Whenever anyone in the household calls the agency to travel, John's profile is accessed and used to confirm or add vital information for any family member.

Corporate profiles are created for each of your commercial clients. Each profile may contain any number of employees who are company travelers. These are listed in the client profile under the *Employee* link. Many times a traveler listed under a corporate profile also has an leisure profile in your database as well, since customer needs are different for leisure and corporate travel.

Anatomy of a Profile

A client profile in ClientBase stores an unlimited amount of information about your customers. To organize all this information and make it easily accessible to all users, each profile is made up of these key areas, *Header Info*, *Toolbar*, *Indicator Icons*, and *Information Links*.

		TOOLBAR INFORMATION LINKS INDICATOR ICONS																							
<p>Leisure - Able/Ken General</p> <table border="1"> <tr> <td rowspan="4"> Mr. and Mrs. Ken Able 1255 East Apple Street Line 2 address, 101 Los Altos, CA94022 USA </td> <td>Phone: +1 (650) 988-1222</td> <td>Interface ID: ABLE IMPOR</td> </tr> <tr> <td>Fax: +1 (650) 425-9833</td> <td>Primary Agent: Juan Pablo</td> </tr> <tr> <td>E-mail: jpgallino@gmail.com</td> <td>Created: 3/5/08</td> </tr> <tr> <td>Web:</td> <td>Groups: TEST</td> </tr> <tr> <td></td> <td></td> <td>Profile No.: 1193</td> </tr> </table> <p>Remarks: Where's funny ties.</p> <p>Address Add</p> <table border="1"> <tr> <td>1255 East Apple Street</td> <td>Address Type</td> <td>Edit</td> </tr> <tr> <td>Line 2 address, 101</td> <td>Primary, Bill To, Ship To</td> <td></td> </tr> <tr> <td>Los Altos, CA 94022</td> <td></td> <td></td> </tr> <tr> <td>USA</td> <td></td> <td></td> </tr> </table> <p>1255 East Apple Street Edit</p> <p>Line 2 address, 101 Edit</p> <p>Secondary</p> <p>Communications Add Special Dates Add</p> <p>Phone: +1 (650) 988-1222 (Primary) Edit Date: 3/20/1999 Type: Wedding Anniversary Edit</p>			Mr. and Mrs. Ken Able 1255 East Apple Street Line 2 address, 101 Los Altos, CA94022 USA	Phone: +1 (650) 988-1222	Interface ID: ABLE IMPOR	Fax: +1 (650) 425-9833	Primary Agent: Juan Pablo	E-mail: jpgallino@gmail.com	Created: 3/5/08	Web:	Groups: TEST			Profile No.: 1193	1255 East Apple Street	Address Type	Edit	Line 2 address, 101	Primary, Bill To, Ship To		Los Altos, CA 94022			USA	
Mr. and Mrs. Ken Able 1255 East Apple Street Line 2 address, 101 Los Altos, CA94022 USA	Phone: +1 (650) 988-1222	Interface ID: ABLE IMPOR																							
	Fax: +1 (650) 425-9833	Primary Agent: Juan Pablo																							
	E-mail: jpgallino@gmail.com	Created: 3/5/08																							
	Web:	Groups: TEST																							
		Profile No.: 1193																							
1255 East Apple Street	Address Type	Edit																							
Line 2 address, 101	Primary, Bill To, Ship To																								
Los Altos, CA 94022																									
USA																									

Header Information

The header conveniently displays pertinent information including the current mailing address, communication entries captured for this profile, E-mail and Website addresses, Interface ID, Primary Agent assigned to this profile and the date it was created. By confirming the accuracy of this information and adding any new details each time a customer calls, the user ensures that the client data (and agency marketing data) is always up-to-date.

Toolbar



The toolbar contains links to features - *Merge to (Doc, E-mail)*, *Merge to PNR*, *Merge to Live Connect*, *Note*, *Mailer*, and *Reminder*. *Merge to Doc* enables you to launch a Document Template from the results of a query into Wordpad, MS Word, Open Office, etc. to view, edit and print the document with all fields merged. *Merge to E-mail* launches an e-mail message for the profile you are in. *Merge to PNR* enables you to pass client data to your reservation system's PNR. You can also create a *Note*, *Mailer*, or *Reminder* from the toolbar for the profile you are in, or link to another profile by using the three dots next to *Profile* field.



Under *Tools*, *Page History* shows a trail of the past areas in ClientBase that have been navigated to in the program, as well as a link to each manager. To jump to any previous area in this history, simply click on its hyperlink. *Settings* allow users, if they have been granted permission to do so, to customize certain areas of the program. *My Login* enables each user to update their own default settings including *Query Folder Defaults*, *Profile Defaults*, *Communication Defaults*, *PNR Import Settings*, *E-mail Settings* as well as *User Name*, *Title*, *E-mail* and *Login Password*. Click *Help* to access useful information about program features.

Click *Log Out* to leave the program or log in as a different user.

For complete instructions on *Merge to Doc*, *Merge to E-mail*, *Merge to PNR*, and *Merge to File* (if applicable), please see chapter, *Putting Profiles to Work for You*.

Detailed Review of Information Links

Each client profile contains the following information links: **General Info, Remarks, Marketing, Family Members/Employees, Activities, Cards, Travel History, Groups, Attachments, PNR Entries, and More Fields.**

General Info Link

The General Information link displays the primary client data for this household or business. The following fields are in the General Information link:

ADDRESS RECORDS

A client profile can include unlimited addresses which may be designated as: *Primary*, *Bill To*, *Ship To*, *Secondary Address* and *Alternate Address*. Only one address though may be designated as Primary, one as Bill To, and one as Ship To. When creating a new address, click *Add Address*, fill in correct address details and choose the address type(s).

This area contains the following fields:

Address:

Address Line 1: Enter first line of address.

Address Line 2: Enter second line of address.

Apt/Suite: Enter apartment or suite number.

Zip/City/State/Country: Enter the zip code, city, state, and country of the address. (If the Database Administrator has set up the Zip Code field in the Windows version of ClientBase, when you enter a Zip Code, the default City, State and Country populates automatically. On the Edit screen of an address record, the Zip Code field is now positioned in front of the City and State to facilitate this feature.)

Description: Enter description if desired.

Address Type

Primary/Bill To/Ship To/Alternate: One address record can represent multiple *Address Types*. Click to select.

Secondary: The *Secondary Address* choice also offers a date option. This is particularly useful because it allows entry of a specific time frame your client may be residing at the Secondary Address. After clicking *Secondary Address*, select the *From* and *Through* months from the dropdown menu.

Save/Cancel: Click *Save* to accept new information or *Cancel*.

To modify an entry, click *Edit* next to the address you wish to alter, make changes, and click *Save*.

To remove an entry, click *Edit* next to the address you wish to remove, and click *Delete*.

COMMUNICATIONS

The standardized format for unlimited telephone, fax, E-mail and web entries in ClientBase provides a platform upon which this information can be easily accessed. When creating a communication, click on *Add Communication*, fill in correct communication details, and click *Save*.

This area contains the following fields:

Passenger: From the drop-down menu choose what passenger this communication entry is connected with (if applicable).

Type: Use drop-down menu to select *Phone*, *Fax*, *E-mail* or *Web*.

Profile's Primary: Indicate if this is the primary phone number, fax, E-mail, or Web address, since only one entry per communication type may be designated as Primary.

Value: You need only type the 7 digits of the Fax number or Phone number if in your area code, as ClientBase version adds a default country code and area code to the number when saved. For numbers outside your area code, type in the 10 digit area code and number (no other typing is necessary). For E-mail and Web entries, type these exactly as you want it to appear.

Description: Choose a description if desired from drop-down menu. These options were setup by the database administrator in the Windows version of ClientBase.

Save/Cancel: Click *Save* to accept new information or *Cancel*.

As alternative methods of communicating with customers continue to expand (e.g. cell phones, beepers, additional E-mails, etc.), you may find your phone tables growing increasingly lengthy for customer profiles. You have the ability to maintain an unlimited number of communication entries. To modify an entry, click *Edit* next to the communication you wish to alter, make changes, and click *Save*. To remove an entry, click *Edit* next to the communication you wish to remove, and click *Delete*.

SPECIAL DATES

These fields are particularly useful to record unique dates for each specific customer. Imagine the marketing possibilities, when several months before an anniversary, birthday or vacation time, your agency suggests as a gift, a trip reflecting the client's preferences. To add unlimited special dates click on *Add Special Date*, fill in special date details, and click *Save*.

Save Cancel

Special Date

Type

Date

Comment

Save Cancel

This area contains the following fields:

Type: Select from drop-down menu. These types were setup by the database administrator in the Windows version of ClientBase.

Date: Select month from drop-down menu, type day and year.

Comment: Type a comment if desired.

Save/Cancel: Click *Save* to accept new information or *Cancel*.
You have the ability to maintain an unlimited number of Special Dates. To modify an entry, click *Edit* next to the special date you wish to alter, make changes, and click *Save*. To remove an entry, click *Edit* next to the special date you wish to remove, and click *Delete*.

ADDITIONAL INFO

These fields provide general information about the profile. To edit fields in this area, click *Edit*, make changes, and click *Save*.

General Information

Company: In a Corporate Profile, enter the name. Any printed reports or labels can include the *Company* name entered in the General Info link.

Last Name: Enter the last name of primary contact in household or business. Any printed reports or labels can include the *First* and *Last Name* entered in the General Info link.

First Name: Enter the first name of the primary contact in this field.

M.I.: Enter the middle initial of the primary contact in the field.

Courtesy Title: Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. The drop-down menu allows you to select from a lengthy standardized list. This courtesy title is printed on mailing labels or on letters in the Document Templates (currently only now in the Windows version of ClientBase. This field is customized by the database administrator.

Additional Info

Interface ID: Important! This field allows the interfacing of records generated from the CRS (Front Office) to the agency accounting system (Back Office). If your agency's system requires that this field exist (for example, TRAMS Back Office does) then create an Interface ID as directed by the agency and complete this box.

Primary Agent: This field defaults to the login agent at the time the profile is created. It can be modified to represent the appropriate agent considered primary to the customer (by clicking on the drop-down menu), or left blank.

Salutation: The name used to greet the customer. For example, if Mr. Henry Wilkenson likes to be called "Hank," enter *Hank* in this field. If Mrs. Emily Anderson likes to be called "Mrs. Anderson," enter *Mrs. Anderson* in this field. Or, if you have a couple and want to include both names when addressing letters, enter *Hank and Emily*, or *Mr. & Mrs. Anderson*.

Branch No.: For agencies with multiple branches, select from a drop-down menu the branch where this profile is created, or with which you want the profile associated. Branches are setup by the database administrator in the Windows version of ClientBase.

Referred By: By using the drop-down menu, select how this client was referred to your agency. Statistic reporting can be obtained from ClientBase to get a bird's eye view of how new customers are learning of your agency. What a great way to evaluate the effectiveness of your advertising. This field is user-definable by the database administrator in the Windows version of ClientBase.

Web ID/Web Password: If your agency is interested in using your website to collect and update customer information, these fields may become important, as most systems require a Web ID and Password to provide access to this type of customer information.

Profile Status

Create User/Create Date: These fields default to the system date and the user logged in at the time the profile is created. Both of these fields can be modified. Agencies use the *Create Date* field to query for new customers so that "Welcome to the Agency Letters" and travel surveys can be mailed. These fields are also used to query for management reports reflecting user productivity in creating new client profiles.

Profile Status: Indicate whether a customer profile is *Inactive* from the drop-down menu. By default all profiles start with an *Active* status. An *Inactive* status is included so that you can flag a customer as inactive without having to delete the profile. When querying the ClientBase database, only profiles marked as *Active* are included in the search. Locate *Inactive Profiles* by using Level 2 Query.

Save/Cancel: Click *Save* to accept new information or *Cancel*.

Remarks Link

The Remarks link provides a full-page view of the unlimited remarks and provides tremendous flexibility for entering comments in each customer profile. To add or edit a remark, click *Edit Text*, add text or make edits, and click *Save* or *Cancel*. The great thing about remarks is that the first few lines can be viewed from anywhere in the profile.

_eisure - Able/Ken **Remarks**

Mr. and Mrs. Ken Able 1255 East Apple Street Line 2 address , 101 Los Altos, CA94022 USA	Phone: +1 (650) 988-1222 Fax: +1 (650) 425-9833 E-mail: jpgallino@gmail.com Web:	Interface ID: ABLE IMPOR Primary Agent: Juan Pablo Created: 3/5/08 Groups: <u>TEST</u> Profile No.: 1193	
---	--	--	---

Remarks: Where's funny ties.

Where's funny ties.

Marketing Link

The Marketing link provides the means of tracking client interests and travel preferences, while arming agents with key information to use during the qualifying process of selling leisure travel. Marketing tables are powerful links to clients with common travel interests when planning a direct mail campaign or planning group travel. Reports showing the travel preferences of your customers are extremely valuable in matching up customers and their interests with travel specials.

To add or modify the client's marketing preferences, click *Edit*. Check or uncheck any marketing codes (setup by the database administrator in the Windows version of ClientBase), and click *Save* or *Cancel*. These Marketing tables and codes are "global," meaning the same codes are available for use in every profile for every user. Remember that customer's needs often change. Removing, or editing marketing information when no longer valid is as important as entering new information.

Family Members/Employees Link

The **Family/Employee Members** link is designed for entering detailed information on specific individuals who are part of a particular household or business. The link is called *Family Members* when working with an *Leisure* profile, and *Employees* when working with a *Corporate* profile.

Leisure - Able/Ken		Family Members					
Mr. and Mrs. Ken Able 456 Pinnacle Peak Road Scottsdale, AZ85259		Phone: +1 (650) 988-1222 Fax: +1 (650) 425-9833 E-mail: kenable@trams.com Web:	Interface ID: 6509881222 Primary: La Tisha Simmons Agent: 10/21/97 Created: UCLA Groups: 18627 Profile No.:				
Remarks: Wears funny ties. Met him at the travel exposition.							
<input type="button" value="Add Family Member"/> <input type="button" value="Paste Family Member"/>		Summary View Detail View					
	Name	First Name	Middle Init	Last Name	Relationship	Courtesy Title	Origin Country
View	Able/Haley	Haley	Nicole	Able	Daughter		Australia
View	Able/Ken	Ken		Able	Primary		US
View	Able/Susan	Susan		Able	Spouse		US

More about Able/Ken.

- General Info
- Remarks
- Marketing
- Family Members**
- Activities
- Cards
- Res Cards
- Travel History
- Groups
- Attachments
- PNR Entries
- More Fields

This page is shown in *Summary View*. To get a full view of all Family Members|Employee s details, click *Detail View*.

Add a new family member/employee by clicking *Add Family Member*. Let's take a look at how to organize information for each family member/employee by going through each field of the Add/Modify screen.

Passenger/Employee

Relationship: By choosing from a drop-down menu, these user-definable items setup by the database administrator in the Windows version of ClientBase can be inserted. By identifying the traveler as a daughter or son in *Leisure* Profiles; Sales Rep or V.P. in *Corporate* Profiles, agents have an advantage when talking to a customer and can personalize their service.

Last Name: Enter the legal last name of family member/employee.

First Name: Enter the legal first name of the Family Member/Employee in this field. This provides you with the correct information for booking purposes.

M. I.: Enter a middle initial.

Courtesy Title: Mr., Mrs., Mr. & Mrs., Ms., Dr. are all examples of courtesy titles. The drop-down menu allows you to select from a customized list (setup by System database administrator). This courtesy title can printed on mail labels and letters.

Birthdate Date (mm dd, yyyy): Enter traveler's birthdate including Month, Day and Year, or any combination of those date fields. (If agent knows only month, enter it, then query the database by month, and send out your birthday cards!) Notice the read only field to the Family/Employee record called *Age*. This field is auto calculated base on the entries in the birthdate fields. This field requires at least a year be entered into the birthdate entry and calculates based on the following logic:

- If Year but no Month and Day, Jan 1st of year is used to calculate Age.
- If Month and Year but no Day, 1st of the month is used to calculate Age.
- If Day and Year but no Month, Jan and day is used to calculate Age.
- If no year then the Age field is left blank.

Passports Passport Number #1 & #2: For up to 2 passports, enter traveler's passport number.

Expiration: Enter traveler's passport expiration date in date format listed below; or double-click on the date from the drop-down calendar. This is the field to query on to send out letters alerting customers that passports are about to expire.

Date Fields Formats

Complete a date field using any one of the following formats:

- 1) mmddyy or mmddyyyy (separators are not required); i.e., 021405
- 2) ddmmyy or ddmmyyyy
- 3) 0 (for current month, day and year date)
- 4) mm (defaults to current day and year)
- 5) mmdd (defaults to current year)
- 6) mm-dd-yy, mm/dd/yy, mm.dd.yy (-, / and . are valid separators)
- 7) m-d-yy, m/d/yy, m.d.yy

Country of Origin: Enter the passport Country of Origin from the drop-down menu.

Remarks: Enter unlimited free-flowing information pertaining to this traveller.

Airline Prefs: For each traveller, enter *Class of Service*, *Seat Preference*, and *Meal Preferences* from convenient checklists. Enter special options from a drop-down menu setup by the Database Administrator. Preferences entered here can even be used within CRS rules, formatted as remarks, and sent to the PNR when this passenger is travelling.

Car Prefs: For each traveller, enter car type preferences from convenient checklist. Enter special options from a drop-down menu setup by Database Administrator. Preferences entered here can even be used within CRS rules, formatted as remarks, and sent to the PNR when this passenger is travelling.

Cruise Prefs: For each traveller, enter dining preferences and ship size from drop-down menus setup by Database Administrator.

Hotel Prefs: For each traveller, enter room location, bedding type and special needs from dropdown menus setup by Database Administrator. Preferences entered here can even be used within CRS rules, formatted as remarks and sent to the PNR when this passenger is travelling.

Tour Prefs: For each traveller, enter escorted preferences from a drop-down menu setup by the Database Administrator.

General Prefs: For the traveller who smokes, check the appropriate box. In the special services box, free-flow any special requests.

To modify or enhance a family member/employee, click *View* in front of the family member/employee name, and then *Edit*. Click *Edit*, then *Delete* to remove a family member/employee.

Save/Cancel: Click *Save* to accept new information or *Cancel* to leave area without saving Changes

Copy Family Member/Employee Record to Another Profile

In ClientBase, you have the ability to copy a family member or employee record from one profile and paste it into another profile. All data captured within the family member/employee record is pasted including: Relationship, Title, First Name, Middle Initial, Last Name, Birth Date, Communication Entries, Passport Entries, Remarks, Cards, Air-Car-Cruise-Hotel-Tour-General Preferences and all PNR Entries. This feature allows a user to take all passenger related entries and copy them into another profile without having to re-enter (e.g. copying a corporate traveler into a leisure profile or visa versa).

To Copy a Family Member/Employee Record:

- 1) Retrieve the desired profile containing the family member/employee record to copy.
- 2) Click the Family/Employee link and from the passenger listing, click the action gear next to the appropriate family/employee record

	Name	First Name	Middle Init	Last Name	Relationship	Courtesy Title	Origin C
View	Aaron/Joe	Joe		Aaron	President	Mr.	US
Passenger Record: 237 [Copy]							
View	Able/Kimberly	Kimberly		Able	Sales Rep	Mr.	
View	Cady/Steven	Steven		Cady	Sales Rep	Mr.	
View	Drew/Nancy	Nancy		Drew	Marketing Manager	Ms.	
View	Usiniski/Janet	Janet		Usiniski	Sales Rep	Ms.	

- 3) Click *Copy*, to copy the employee details to the Windows clipboard.
- 4) Close the profile, before copying anything else to the Windows clipboard, retrieve or create the profile to copy to.
- 5) Click the Family/Employee link. (Delete the blank default Family/Employee that has been created if applicable.)
- 6) Click *Paste Family/Employee*.

Activities Link

This link displays a complete history of all contacts associated with this specific client. Included are Notes (record of interaction with client), Reminders (record of scheduled past and future activities) and Mailers (record detailing mailings sent to this client).

To add a new Note, Reminder or Mailer, click on the drop-down menu item *Create Activity*. To modify or enhance a Note, Reminder or Mailer click *Edit* next to the item. Click **Edit|Delete** to remove any item.

Notice the filter buttons located directly above the Activities results screen. This allows for quick sorting of the results appearing in this link. By default ALL Activities are displayed, but options for viewing just Mailers, Notes, Reminders, or Open Reminders are available. Also, there is a *Summary View* and *Detail View* of activities in the listing.

Leisure - Able/Ken

Activities

Mr. and Mrs. Ken Able 456 Pinnacle Peak Road Scottsdale, AZ85259	Phone:	+1 (650) 988-1222	Interface ID:	6509881222
	Fax:	+1 (650) 425-9833	Primary Agent:	La Tisha Simmons
	E-mail:	kenable@trams.com	Created:	10/21/97
	Web:		Groups:	UCLA
			Profile No.:	18627

More about Able/Ken...

- General Info
- Remarks
- Marketing
- Family Members

Activities

- Cards
- Res Cards
- Travel History
- Groups
- Attachments
- PNR Entries
- More Fields

Remarks: Wears funny ties. Met him at the travel exposition.

-- Create Activity --

Filters

[All Activities](#)
[Mailers](#)
[Notes](#)
[Reminders](#)
[Open Reminders](#)

	Type	Activity Date Time	Subject	Priority	Login
View Edit	Mailer	7/24/03 3:39 PM	test email		SYSD
View Edit	Mailer	3/5/03 1:45 PM	hfjhjsfjkhsjkfhksjhakjhkjsfhf dkjsa hkhakj hfkjahf		TISH
View Edit	Reminder	3/5/03 1:30 PM		Medium	TISH
View Edit	Mailer	2/27/03 2:52 PM	Mailer Test		TISH

Sort Activities by clicking *Mailers, Notes, Reminders, or Open Reminders*

Cards Link

Keep track of customer's credit cards, travel clubs, frequent flyer numbers, expiration dates and more in your customer profile. This area summarizes every card for every passenger. (Actually a good tip is to enter or modify cards here rather than in the Family Member/Employee link as it is quicker.) To add a new card, click *Add Card*. To modify or enhance an existing card, click *Edit* next to the item. Click **Edit|Delete** to remove a card. Also, there is a *Summary View* and *Detail View* of Cards in the listing.

Leisure - Able/Ken

Cards

Mr. and Mrs. Ken Able 1255 East Apple Street Line 2 address , 101 Los Altos, CA94022 USA	Phone:	+1 (650) 988-1222	Interface ID:	ABLE IMPOR
	Fax:	+1 (650) 425-9833	Primary Agent:	Juan Pablo
	E-mail:	jpgallino@gmail.com	Created:	3/5/08
	Web:		Groups:	TEST
			Profile No.:	1193

Remarks: this is an imported profile with Profile import

[Summary View](#) | [Detail View](#)

	Card Type	Card Code	Number	Exp Date	Name on Acct	Card Description	Issued B
Edit	Credit Card VI		4788250000028291	3/16/11	Ken Able	Visa	

DIRECTIONS FOR ENTERING/EDITING CARDS:

Frequent Flyer, Credit Cards, Passport #'s, etc.

Name: From the drop-down menu, enter the passenger for whom this card is associated. If the card is associated with all profile travelers, leave blank.

Card Type: From the drop-down menu, choose the type of card, Car Program, Frequent Flyer, Hotel Program, or Other.

Card: From the drop-down, select the card, *AT-Air Travel Card*, *AX-American Express*, *DSDiscover Card*, *MC-MasterCard*, or *VI-Visa*.

Card Number: Enter the card number.

Expiration: Free flow date of expiration in date format listed below, or click on the 3 dots to access calendar from which to double-click on an expiration date.

Date Fields Formats

Complete a date field using any one of the following formats:

- 1) mmddy or mmddy (separators are not required); i.e., 021405
- 2) ddmmyy or ddmmyyy
- 3) 0 (for current month, day and year date)
- 4) mm (defaults to current day and year)
- 5) mmdd (defaults to current year)
- 6) mm-dd-yy, mm/dd/yy, mm.dd.yy (-, / and . are valid separators)
- 7) m-d-yy, m/d/yy, m.d.yy

Name on Card: Enter the name on the card.

Issued By: Free flow card issued by information.

Remarks: Enter free flow remarks for this card here for reference.

More Details

Approx. Miles: Enter free flow approximate miles here for reference.

Card Limit: Enter free flow card limit information here for reference.

Save/Delete/Cancel: Click *Save* to accept new information, *Delete* to remove this card entirely if in edit mode, or *Cancel* leave area without saving changes.

Travel History Link

The Travel History link is a read-only screen which displays a list of issued invoices for this client providing easy access to the client's past travel history, number of invoices issued, sum total of bookings, average booking amount and the total commission.

Leisure - Able/Ken

Travel History

Mr. and Mrs. Ken Able 1255 East Apple Street Line 2 address , 101 Los Altos, CA94022 USA	Phone:	+1 (650) 988-1222	Interface ID:	ABLE IMPOR
	Fax:	+1 (650) 425-9833	Primary Agent:	Juan Pablo
	E-mail:	jpgallino@gmail.com	Created:	3/5/08
	Web:		Groups:	TEST
			Profile No.:	1193

More about Able/Ken..

General Info
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More Fields

Close Profile

Remarks: this is an imported profile with Profile import

Summary View | Detail View

Filters										
Sort	Issue Date	Issue Date From:		To:		Search				
Air	Hotel	Car	Cruise	Tour	Rail	Transport	Insurance	Service Fee	Other	
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Record Count: 6		Sales (Total/Avg.): \$2,600.00 / \$433.33				Commission (Total/Avg.): \$250.00 / \$41.67				

Filters

Sort: Select the way you want data sorted by using the drop-down menu to select Issue Date, Depart Date, Travel Category, Passenger Name, First Inside Agent, Invoice #, Invoice Type, Invoice Status, Ticket#, or Ticket Confirm #.

Issue Date: Enter the from and to Issue Date by clicking on the drop-down menu to access a calendar and double-clicking on the desired date, or free flowing the date using date format listed below.

Date Fields Formats

Complete a date field using any one of the following formats:

- 1) mmddyy or mmddyyyy (separators are not required); i.e., 021405
- 2) ddmmyy or ddmmyyyy
- 3) 0 (for current month, day and year date)
- 4) mm (defaults to current day and year)
- 5) mmdd (defaults to current year)
- 6) mm-dd-yy, mm/dd/yy, mm.dd.yy (-, / and . are valid separators)
- 7) m-d-yy, m/d/yy, m.d.yy

Tvl Cat.: Filter the results per travel category by checking/unchecking the travel category buttons, *Air, Hotel, Car, Cruise, Tour, Rail, Transport, Insurance, Service Fee, or Other.*

Click *Search* to display desired query, and notice a *Summary View* or *Detail View* of the listing is available for your convenience.

Attachments Link

To enhance the amount and type of information accessible in a ClientBase profile, a feature is included in all profile types allowing you to point to other files available on your local or network drive. These files are referred to as *Attachments*.

To access an attachment at the client level, click the *Attachment* link.

To add a new Attachment click *Add Attachment*, and *Browse for Attachment* to identify the File Path of the file. The File Path includes the drive where the file is located, any directories or subdirectories, and the name of the file. Choose to compress the file by clicking in the Compression box. Enter a brief description of the attachment, if desired. Click *Save*.

To view a saved Attachment, highlight the attachment, and click *Open* next to the attachment. ClientBase uses Windows Associations to view the file type, load the appropriate software, and retrieve the specified file. Every file has an extension (e.g., .doc, .jpg, .bmp, .html, etc.) must be

associated with a specific Windows software program such as Word, Paint Shop Pro, Internet Explorer, etc. to be viewed. Although this association is created automatically by Windows when various software programs are installed, if a workstation does not have a software program associated with the type of file an Attachment is pointing to, then the file cannot be viewed from the Attachment created in ClientBase.

Since a copy of the file has been stored within the ClientBase database when it is opened at a workstation, it is loaded temporarily into a temp directory. If any changes are made to the original file or the temporary file, the attachment in ClientBase must be re-directed to the new file, or the old file will still be displayed. This is done by using *Edit* and browsing for the updated file. Once this is done, the copy of the file saved in the ClientBase database will be updated.

Click *Edit*, then *Delete*, next to the attachment to remove it.

PNR Entries Link

ClientBase PNR entry tables are included at the Branch, Profile, Agent, and Passenger/Employee. As a ClientBase user, you may presently create these entries at the profile and agent level only. PNR entries setup at the branch level, as well as any number of PNR Rules (simply a way of designating how certain fields of information captured in a profile should be formatted when sent to a PNR) are setup by the administrator in the Windows version of ClientBase.

Store any number of miscellaneous PNR Entries to include when using the Merge to PNR feature for this client. Any PNR entries captured here at the profile level is included regardless of which family member/employee is travelling.

Save Cancel

PNR Entry

CRS Description

Always Move

True

Display On Screen

True

Entry

Save Cancel

CRS: Choose your CRS system from the drop-down menu.

Description of Entry: Enter a free-flow "Description" field.

Always Move: By selecting *True* from the drop-down menu, the entry always moves when you do a merge to CRS. If *False* is selected, moving the entry is optional.

Display on Screen: When *True* is selected, the entry automatically displays on the front screen when Merging to the PNR. If *False* is selected, the entry is displayed on the *Additional Entries* link.

Within each PNR Entry or PNR Rule that is set to *Always Move*, an option is included called "Display on 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 current PNR. For PNR entries that should always move regardless of the profile or PNR, this "Display on Screen" can be set to *False*, so that the Selection Screen is less complicated for the agent to review. Any of these entries that have not been designated to display on the selection screen can be viewed, if desired, by clicking the "Additional Entries Link" in the Merge to PNR feature.

PNR Entry: Enter the PNR entry the way you would in your reservation system and then *Save*. For more information on moving data from ClientBase to your GDS PNR, please refer to chapter entitled, *Putting Profiles to Work for you*.

More Fields Link

If you want to track it, and ClientBase doesn't ask for it, here is where your database administrator created customized fields of information. Items like Social Security Numbers, client UDID's and other miscellaneous information that you want to track, can be captured in these fields.

To tag a profile with a More Field, click *Edit*, and from the drop-down menus next to the More Field Categories, select the More Field item you want to use. Then click *Save*. To untag a More Field Item, simply highlight the item and click *Delete* on the keyboard.

Note: If you enter into the free flow area and there is a partial match within the drop-down choices, if you click the drop-down list, you are taken to that match first. Also, if you make a partial entry into the free flow area and it matches one of the items in the drop-down list, upon tabbing out, the field is completed automatically.

Profiles Search

When *Profiles* is first opened, either select a link which contains a stored set of search fields (*Global* or *Personal Saved Searches*) from the drop-down menus, or use the simple search or advanced search area to enter a custom search. (Clicking *Find* produces a list of all profiles.)

The *Global Saved Searches* or *Personal Saved Searches* are accessible to anyone for general viewing. They include Leisure Clients, Corporate Clients, Vendors, Agents, Other, All Profiles, Service Providers, and any links with a customized set of query filters that were setup and saved. By clicking on any of these links, you see the completed filters used for this stored search, and a listing on the results screen of all profiles meeting the criteria of the selected searches. You can also locate profiles by using the simple search area or the advanced search area.

Date Fields

Complete a date field using any one of the following formats:

- 1) mmddy or mmddy (separators are not required)
- 2) ddmmmy or ddmmmyy
- 3) 0 (for current month, day and year date)
- 4) mm (defaults to current day and year)
- 5) mmdd (defaults to current year)
- 6) mm-dd-yy, mm/dd/yy, mm.dd.yy (-, / and . are valid separators)
- 7) m-d-yy, m/d/yy, m.d.yy

Simple Search Filters

The simple search area allows you to quickly locate a profile or a group of profiles by completing one or two filters.

Find Profiles by...

Profile Type	▼		▼	Find
Profile Name/Company	▼			

The drop-down menu fields identify what you want to *search by* and are completed by selecting from the following: *Profile Type, Profile Name, Company, Last Name, Family/Traveler Name, Phone, FAX, E-mail, Web, Family/Traveler Phone, Interface ID, City, State, and Zip Code.*

The blank fields allow you to type in what you want to *search for* and are completed by choosing from the drop-down, or typing in free-flow information. To prevent spelling errors, it is suggested that you type no more than 3 or 4 characters in the free-flowing fields.

If both fields are used in this search, then the results match both criteria, not either/or. This means the search filters are strung together with an “and” not an “or”. After completing or changing data in the filters, click *Find*. The system automatically sifts through the database and displays the matching profiles in the results screen.

For example, you are looking for a leisure client, Hazel Tiggs. Set the first field to *Profile Type* and pick *Leisure* from the drop-down menu in the field to the right. (Additional Profile Types are *Corporate, Service Provider, Agent, Vendor* and *Other*.) Then set the second field to *Profile Name*, type in “tig” and click *Find*. Hazel’s profile appears in the results screen, and can be entered by clicking *View*. If any other profiles start with “tig”, these would appear in the results screen as well.

Search Results Screen

After you have completed a search, the Results Screen not only provides a count and list of search results, but also easy access to a specific profile. To receive a count of the query results, click *Count*. To retrieve a specific profile, click *View* next to the entry or the action menu icon (gear).

View 	L	Sharp/Janet	2135145555	Manhattan Beach CA	95124	+1 (213) 842-8743
Profile Record: 4						
[Edit] [View Activities] [Merge to PNR] [Merge to Document] [Merge to E-mail] [Live Connect] [New Res Card] [New Note] [New Mailer] [New Reminder]						

This icon is displayed to the right of *View* and is listed for each record in the query. It has been designed to allow you to perform a variety of actions for that one record without having to open the record first - saving you a few extra clicks of the mouse. Click the icon and the following options appear:

From the Profile Search Results:

Edit (Leisure, Corporate, Vendor, Agent or Other): Takes you directly to the *Edit Additional Info* section of the selected profile for modifying without having to first view the profile and selecting *Edit Additional Info*.

View Activities: Take you directly to the activities tab for the selected profile without having to open the profile first.

Merge to PNR: Activates *Merge to PNR* for the selected profile without having to open the profile first.

Merge to Document: Activates *Merge to Document Template* for the selected profile.

Merge to E-mail: Activates *Merge to E-mail* for the selected profile.

New Note: Activates *Note* creation screen for the selected profile.

New Mailer: Activates *Mailer* creation screen for the selected profile.

New Reminder: Activates *Reminder* creation screen for the selected profile.

Merge to PNR

Using the Merge to PNR Feature

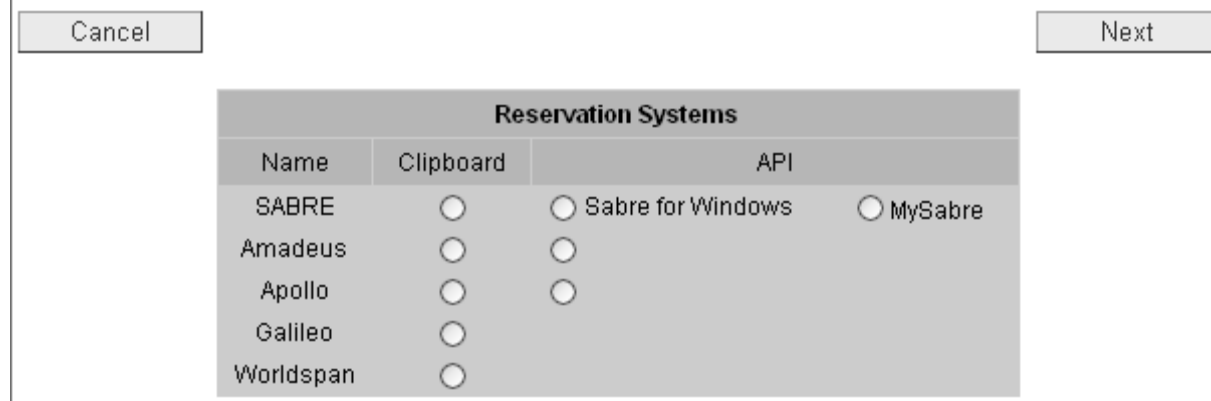
1) Open a PNR on your computer. You may start checking availability and actually have a reservation ready in the PNR, but when it is time to add client name and address information, toggle into ClientBase. (Some agencies like to start in ClientBase, Merge to PNR, and then toggle into the PNR to check availability, and create reservation.)

2) Search to find the client's profile. To Merge to PNR from the Results Screen, click the action menu icon (gear) in Profile Manager, and *Merge to PNR*



(If the client's profile is not in the system, create one.) If you are inside the profile, update any address, phone and E-mail information, and click the *CRS* icon in the toolbar.

3) First time users select the platform to use to send profile information to the GDS, and download the platform applet. The very first time you use the Merge to the PNR feature, you are presented with a screen from which to pick this platform one time only:



Unless you are using Worldspan or Sabre Webtop which use the Windows Clipboard, you are using an API (Application Protocol Interface). Select the appropriate platform and click *Next*. For users selecting an API platform, an applet is downloaded on your computer so that PNR data can integrate with your workstation:

Important Note: Make sure to check off *Always trust content from TRAMS, Inc.* That way you won't see this dialog every time you do a Merge to PNR. In the future whenever you delete cookies or files from your Internet Explorer, you will be asked again to download this applet.

4) After you have downloaded the applet (for API platform users only), you are prompted with a series of checkboxes in the PNR Builder Selection Screen. Scroll down to select everything you


```
5/MR AND MRS KEN ABLE$5/1255 EAST APPLE STREET LINE 2 ADDRESS 101$5/LOS
ALTOS CA 94022
9-+12-
9650-988-1222-
#1#YYS
5.S*ANABLE IMPOR
```

Profile Entries

Bill To Address

5/MR AND MRS KEN ABLE\$5/1255 EAST APPLE STREET LINE 2
ADDRESS 101\$5/LOS ALTOS CA 94022

Ship To Address

5DL-MR AND MRS KEN ABLE\$5DL-1255 EAST APPLE STREET LINE 2
ADDRESS 101\$5DL-LOS ALTOS CA 94022

Phone Numbers

need including passengers and credit card/frequent flyer information. The gray area recaps (previews) entries which have been setup by the database administrator to always move into the PNR. Select the information you want to move to a PNR by scrolling down and checking or unchecking any optional entries. Click *Cancel* to abort the Merge to PNR process, *Refresh* to see an edited version of the gray recap screen at the top of the selection screen, or *Preview*.

5) Clicking *Preview* takes you to a PNR screen where you can edit and get a full-page preview of any entries you have approved. The screen displays all information in the exact format that it will land into your current PNR. Information on this screen can be modified, but does not permanently update your ClientBase profile.

6) Pressing *Finish* does the following depending on your CRS:

Sabre for Windows, MySabre, Amadeus Plus Scripts (APS), Vista, and Apollo/Galileo Users: When clicking *Finish*, the previewed information is pasted into your current PNR. If this occurs successfully, a confirming message appears. Use your normal Windows command (<Alt+Tab>) to toggle into your CRS, hit *Display All* and view the updated PNR.

Additional Entries Link

Within each PNR Entry or PNR Rule that is set to *Always Move*, an option is included called "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 current PNR. For PNR entries that should always move regardless of the profile or PNR, this *Display on Selection Screen* can be unchecked so that the Selection Screen is less complicated for the agent to review. Any of these entries that have not been designated to display on the selection screen can be viewed, if desired, by clicking *Additional Entries*.