

CLIENTBASE PLUS TRAINING LIST

LIVE WEBEX CLASSES

Suggested order, topics and class level.

Note: It would be beneficial for the Database Administrator to attend basic agent classes to understand the program prior to participating in the Setup classes.

To enroll or join a class, use the following link:

<https://clientbase.webex.com/mw02021/mywebex/default.do?siteurl=clientbase&service=6>

CLIENTBASE DAILY Q & A SESSION

Daily opportunity to ask questions and discuss uses of the program (Windows version) in an open forum

No registration required – “Join” at any time during the hour
For all users

GETTING STARTED – THE BASICS

For System Administrators, Management, Trainers

1) GENERAL OVERVIEW

Offered weekly, this session reviews the functionality, setup capabilities and the various benefits of ClientBase. This Overview provides a basis to determine agency focus and determine future classes to attend. It's ideal for conversions from CB or CBT to new users to a ClientBase program.

Suggested attendance prior to the two-day hands-on class.
Geared to Managers and Database Administrators

GETTING STARTED – THE BASICS

For Frontline Agents

1) FRONTLINE TRAVEL AGENT OVERVIEW

This session provides a demonstration of the daily practical applications of CB for the frontline agent. Included will be the advantages of using: Profiles, Activities, Res Cards with Live Connect and Merging to a PNR, Email, Labels and Letters.

Geared to Frontline Agents

2) STARTING WITH THE BASICS – PROFILE SKILLS

Basics of building a profile - covers QuickStart skill 1

Recommended for Frontline Agents

"New user / beginning level"

3) STARTING WITH THE BASICS – MERGE TO PNR

Basics of the Merge to PNR - covers QuickStart skill 2

Recommended for Frontline Agents

"New user / beginning level"

4) STARTING WITH THE BASICS - USING MARKETING CODES

Use of the Marketing Tab and the client survey - covers QuickStart skill 3

Recommended for Frontline Agents

"New user / beginning level"

- 5) **STARTING WITH THE BASICS – USING REMINDERS AND RES CARDS**
 Use of a basic Res Card and a Reminder to follow up on sales – covers QuickStart skill 4
 Recommended for Frontline Agents
 "New user / beginning level"
- 6) **STARTING WITH THE BASICS – RES CARD SKILLS**
 Creating a basic Res Card - covers QuickStart skill 5
 Recommended for Frontline Agents
 "New user / beginning level"

AGENCY DATABASE ADMINISTRATORS

- 1) **SETTING UP PNR RULES AND PNR ENTRIES**
 Attendees should be familiar with a basic CB profile and CRS formats.
 "New user / beginning level"
- 2) **SETTING UP DOCUMENT TEMPLATES AND LABEL DEFAULTS**
 Attendees should be familiar with CB profile fields.
 "New user / beginning level"
- 3) **SETTING UP TO INVOICE FROM RES CARDS**
 Attendees should be familiar with issuing Invoices from Res Cards
 "Intermediate / advanced level"
- 4) **SETTING UP RES CARD DEFAULTS**
 Attendees should be familiar with Res Cards
 "Intermediate / advanced level"
- 5) **CUSTOMIZING RES CARD TRIP DOCUMENTS**
 Attendees should be familiar with Res Card trip documents
 "Intermediate / advanced level"
- 6) **SETTING UP LIVE CONNECT FOR AGENCY USE**
 Attendees should have an understanding of Live Connect
 "Intermediate / advanced level"
- 7) **CLIENTBASE ENHANCEMENTS**
 Review of enhancements included in the latest release
Offered only after a new release
 Geared to all users

FRONT LINE AGENTS IN-DEPTH CLASSES

- 1) **ADVANCED PROFILES**
 In-depth review of building a client profile.
 "Intermediate, advanced level"
- 2) **USING TO COMMUNICATE WITH CUSTOMERS: MERGE TO DOCUMENT TEMPLATE, MERGE TO LABEL AND MERGE TO E-MAIL**
 The basics of Merge to Document Template, Merge to Label, Merge to Email
 "New user / beginning level"
- 3) **USING ACTIVITY MANAGER TO ORGANIZE YOUR DAY**
 Attendee should be comfortable with the basic concepts of CB
 "Intermediate level"

4) USING RES CARDS FOR INVOICES, ITINERARIES & TRIP STATEMENTS

Attendee should have working knowledge of Res Card or taken Res Card to Manage Data class

"Intermediate level"

5) USING RES CARDS – ADVANCED SKILLS

Attendee should have working knowledge of Res Cards or taken Basic Res Cards and Res Cards to Invoice class.

"Advanced level"

6) USING QUERIES TO INCREASE SALES ON THE AGENT LEVEL

For the best results attendee should have working knowledge of the following basics: building profiles, merging to templates, labels. Provides a tool to help agents stimulate travel for their own clients.

"Intermediate level"

7) USING LIVE CONNECT TO ARRANGE TRAVEL: RESERVATIONS, INSURANCE AND FOREIGN CURRENCY PURCHASE

Live Connect process including a demonstration of the booking and import process

"Intermediate level"

8) INVENTORY MANAGER – OVERVIEW AND SETUP

Review of the uses and setup of the Inventory Manager and creating Inventory Records.

This class has no definitive targeted group and can be taken by any user involved in managing group inventory.

"Intermediate level"

9) INVENTORY MANAGER - USING RES CARDS TO PULL FROM INVENTORY

Review of using the Inventory Manager to pull Inventory data using a Res Card.

"Intermediate level"

MANAGEMENT/MARKETING TEAM

1) USING REPORTS TO MANAGE, MARKET AND UNDERSTAND YOUR DATABASE

Attendees should have a working knowledge of CB profiles and query capabilities.

"New user / beginning level"

2) QUERY AND PRINT LABELS AND LETTERS

Attendees should have a working knowledge of CB profile fields and knowledge of Merging to Letters and Labels.

"Intermediate level"

3) USING BLAST E-MAIL

Attendees should have working knowledge of CB profile fields and understanding of e-mail

"Intermediate level"

CLIENTBASE BROWSER

For Frontline Agents using CBB

1) GETTING STARTED WITH THE BASICS

Overview of the basics of the ClientBase Browser version

"New user / beginning level"

SPECIALIZED CLASSES

Please note that these classes have an alternate link to enroll and attend

<https://tbo.webex.com/mw0202l/mywebex/default.do?siteurl=tbo>

1) ENHANCED GROUP MANAGEMENT IN TRAMS BACK OFFICE AND CLIENTBASE

Learn how to setup groups in TBO and ClientBase

Geared to Bookkeeper/Manager/Group Specialist

“Intermediate / Advanced level”

2) CLIENTBASE & TBO: AUTOMATE YOUR TRAMS PROCEDURES

Geared to Managers and Database Administrators

3) HOW TO DOWNLOAD AND UPDATE TBO (OR CLIENTBASE), USE OF KNOWLEDGE BASE AND HELP FILES, AND TRAMS CRYSTAL REPORTS

The goal of this session is to review steps to successfully learn how to download and update new releases, use Knowledgebase and Help Files and TRAMS Crystal Reports (supplemental reports for ClientBase).

Geared to Managers and Database Administrators

If you require assistance with getting started, importing profiles from another source or our QuickStart Training Program please contact:

Training@trams.com

For additional information or assistance on any features including:

Setting Up User Logins and Permissions

Setting Up Global Defaults

Dupe Check

Global Modify

Case Converter

Backup/Restore

ClientBase Browser

Please contact

Support (Support@trams.com)

Or check out our Recorded sessions:

<http://www.trams.com/cbi/cbp.shtml>

Or join one of our daily Q & A Sessions:

<https://clientbase.webex.com/>