ClientBase:
3.02 and 3.03 Key Enhancements

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Version 3.02 Enhancements

*****Added a new feature to profiles called "Quick View" which, with a single click, provides you with a summary of key profile data across many of the tabs of information.** To obtain this quick summary of the current client profile (Leisure or Corporate), open any client profile and click the Quick View button within the main toolbar and in one screen view the following:

- Address
- Top 2 communication entries
- Salutation
- Primary Agent
- Profile Create Date
- Top Special Date Entry
- Family Member listing
- Remarks
- Travel Preferences
- Travel History listing (Last 15 bookings)
- Cards
- Active Res Card listing
- Cancelled Res Card listing
- Mailers (Last 10)
- Open Reminders

Please note the following features are included within the Quick View format:
- Made the column size, arrangement and sorting "sticky" for each workstation. So go ahead and arrange the data in each section as you would like to see it.
- Single clicking on a grid's Header will "hop" you to that tab of the profile. Double clicking on an entry within a grid will "hop" you to the record for viewing or editing. Clicking Apply will save changes made directly from the Quick View screen, clicking Refresh will refresh the screen. This means you can edit data like a family member or credit card entry right from the Quick View screen!
- Included a "Fit To Screen" check box in Quick View. If checked this will maximize the utilization of space available on your screen based on your screen size and resolution.
- To close the Quick View format and return to the profile tabs, click the button located in the upper right corner called "Return to Profile", or click the "Q-View" button on the main tool bar.

*****Added the ability to make "Quick View" the default display when opening an existing Leisure or Corporate type profile.** Each User has the ability to determine what default tab appears when opening an existing profile and the Quick View display has been added to these options. To change the default to Quick View, each User can go to Utilities|MyLogin and click the Profile Defaults tab. From the drop down list available for Leisure and Corporate type profiles you can now set the default to "Quick View" if desired.

*****Added a new check box option to the User Defined Fields settings called "Allow Free Flow".** In the past, all User Defined Fields (fields throughout the program underlined and blue that allow you to set up a custom drop down list) have allowed for free flow entries so this "Allow Free Flow" setting will be checked by default. If you would like to force your agents to complete a field by selecting an entry from the drop down list and not allow any free flow entries (forcing consistency for query or reporting purposes), remove the check from "Allow Free flow" for that field.

Settings for User Defined fields can be accessed from Global Defaults|User Defined Fields or a shortcut to these settings for a specific field can be accessed by simply clicking on the underlined blue field name within a Profile, Activity, Res Card or Inventory record.

To restrict a User from being able to edit the User Defined Field settings, you must log into ClientBase as SYSDBA, go to Utilities|User Logins|User List and from the Advanced permissions click the Menu Options tab and remove the check from the Global Defaults|User Defined Fields menu.

Currently the following User Defined Fields do not include this option: Card Code|Type, Zip Code|City|Sate, Profile and Res Card More Fields, and Groups.

*****Added the ability to customize the passenger name format used when Merging to a PNR from a profile.** In previous versions, ClientBase hard coded the format of the passenger name/s to include 1 name entry for common names, Last Name, First Name and Courtesy Title. With this release you can now go to Global Defaults|PNR Settings and click on the Passenger Name Format tab to customize the default name format to add a Middle Initial or Middle Name or remove the Courtesy Title etc. In addition to being able to use any of the below merge fields, there is also a checkbox called "Combine same Last Name entries" which allows you to set whether common name entries appear as one or many name entries.

The following merge fields are available within the Passenger Name format:
Courtesy Title
First Name
Last Name
Middle Initial
Middle Name
No. of Passengers

*****Added "Cruise Program" to the hard coded drop down list of Card *Types* within the Card tab of a profile.** This field can now be used as a filter when running Profile Manager Level 2/3 queries, it is included on the Client Survey if attached to a passenger and can be used as Field Group within your Merge to PNR rules.

*****Added a "Go To Res Card" button to the Travel History tab of client, vendor and agent profiles**. If an invoice listed within the Travel History tab was generated via a

Res Card, you can now seamlessly hop into that Res Card for further information but clicking the "Go To Res Card" button. Also added Res Card No to the columns in the Travel History tab view.

*****Added a new setting to Global Defaults called "Default Field Values for Res Cards".** In this area you can further customize your Res Cards and how they default upon creating new Res Cards and Reservations. The following defaults can now be set:

Res Card Level:
Res Cycle (Can be set to default to any of User Definable drop down options setup)
Default All Family Members for Leisure Profiles (yes/no)
Default Tab Displayed (Reservations, Invoices, Activities, Agent Remarks, Client Feedback, Attachments, More Fields, Edit History)

More Fields Level: (Can be set to default to any of User Definable drop down options setup for each More Field Category)

Reservation Level:
Booking Status (Confirmed, Quoted, Cancelled)
Travel Category (Air, Hotel, Car, Cruise, Insurance, Miscellaneous, Rail, Tour, Service Provider, Transportation)
Filter Vendor Profiles for Travel Category Selected (Yes/No)
Filter Service Provider Profiles for Travel Category Selected (Yes/No)
Default Service Provider Name to Vendor Name (Yes/No)
Reservations Imported from PNR Default to "Invoiced Outside of CB+" (Yes/No)
Print Address on Itin/Invoice for
Hotel/Car/Insurance/Miscellaneous/Tour/Transportation/ (Yes/No)
Print Cruise Itin Option (Sort by Date or Do Not Sort)
Print Itemization Option (Print All Itemization Details, Summarize by Passenger, Summarize by Category/Passenger, Summarize by Description/Passenger, Do not Print Itemization)

*****Enhanced Res Card "Required Fields" settings (found under Global Defaults|Required Fields|Res Card Required Fields) to include the ability to set More Fields and certain Reservation level and Service Provider level fields as required fields.**

Res Card More Fields
Any More Field categories that have been setup within your system (these are User definable) can be set to either "Required" or "Optional". In addition, you can set a More Field as required only if certain types of Reservations exist, based on the Reservation Travel Categories that are selected within this setting.

Reservation Level Fields

The following fields can now be set to "Required' or "Optional": Confirmation #, Passengers, Booking Method, Deposit Due Date, Final Payment Due Date, Deposit Amount.

Service Provider Level Fields
The following fields can now be set to "Required" or "Optional": Start Date, End Date. In addition, you now have the ability to force a unique Service Provider Name (different from the Vendor name) with the new setting "Unique Service Provider".

*****Enhanced the PNR Import button located within the Res Card Reservation tab so that an agent can use this button to do a Merge to PNR in addition to a PNR Import.** This way if an agent is working in a Res Card and decides to book something within the GDS they no longer have to close the Res Card to get to the Merge to PNR feature but can access this feature directly from the Res Card.

*****Added a new set of "Print Options" within the Res Card Reservation Itemization area.** Now you have several different format options that determines how the Itemization is sorted and printed on your invoice for your customer including the following:
- Print all Itemization Details (prints itemization as it has in the past)
- Summarize by Passenger (lists totals by passenger)
- Summarize by Category/Passenger (lists each passenger as a column broken down by Tvl Category)
- Summarize by Description/Passenger (lists each passenger as a column broken down by Description)
- Do not Print Itemization (allows you to itemize for your internal records but doesn't print on the invoice)

All existing Reservations with Itemization will default to "Print all Itemization Details", which prints itemization as it has to date. To change this default format for new Reservations, go to Global Defaults|Default Field Values for Res Cards, click on the Reservation tab and set the Print Itemization Option to the desired format. This setting simply sets the default for new Reservation Itemization entries, but can be tailored on a reservation by reservation basis to whatever format is desired for that reservation.

*****Added a new field to the Cruise Itinerary called "Print Options" and include two format options including "Do Not Sort/List Depart then Arrive" and "Sort by Date/List Arrive then Depart".** ”Do Not Sort/List Depart then Arrive” prints the Cruise Itinerary as it has in the past. The “Sort by Date/List Arrive then Depart” provides a new format that conforms to the more traditional way cruise itineraries are printed.

All existing Reservations with cruise itineraries will default to the existing format of “Do Not Sort/ListDepart then Arrive” and any new cruise Reservations added will default the cruise itinerary to “Sort by Date/List Arrive then Depart”. To change this new default format for new Reservations, go to Global Defaults|Default Field Values for Res Cards, click on the Reservation tab and set the Print Cruise Itin Option accordingly. This Global

Default setting simply sets the default for new Reservation entries, but can be tailored on a reservation by reservation basis to whatever format is desired for that cruise itinerary.

*****Added a "Print on Itin/Invoice" checkbox to the Address tab of a Service Provider record within a Res Card Reservation.** Previously only hotel addresses printed on Invoices and Itineraries (car, insurance, miscellaneous, tour and transportation travel categories did not). Now, rather than being hard coded, this is simply the default as hotel address records will default the "Print on Itin/Invoice" box to being checked, but can be removed if desired. Car, insurance, miscellaneous, tour and transportation travel categories default the "Print on Itin/Invoice" box to being unchecked, but can be added if desired. To change these default settings for new Reservations go to Global Defaults|Default Field Values for Res Cards, click the Reservation tab and either place a check or remove the check from the "Print Address on Itin/Invoice" for the corresponding Travel Category.

*****Added a new Res Card report called Close Ratio Report.** This report analyzes the Res Cards with the current Res Card Manager query results and provides statistics on your close ratio, which is the % of total Res Cards that include a confirmed or invoiced reservation. The report can be sorted by Agent or by Marketing Source and the basis for considering a Res Card "closed" can be set to either having a "confirmed reservation" or an "invoiced reservation". The following information is then printed on this report:

Agent Name or Marketing Source (based on report setting)
Total Number of Res Cards
Total Number of Res Cards either with Invoices or with confirmed Reservations (based on report sorting)
Total Number of Res Cards without Invoices or confirmed Reservations
Close Ratio Percentage
Average # of Days to Close
Average Trip Total
Average Trip Commission

If agents are trained to create a Res Card when a trip inquiry is first received, whether anything is booked at that time or not, then this report will provide valuable sales analysis to help train, motivate and incentive your agents to close more of the inquiries that come into your agency.

*****To help make entering repetitive inventory easier, we added the ability to copy and paste an Inventory record.** Two new buttons have been added to Inventory Manager query results called "Copy" and "Paste". From either the Level 1 or Level 2 Query results you can now copy any inventory record by highlighting it and clicking "Copy". Subsequently clicking on "Paste" will automatically create a new Inventory record with all of the copied inventory details defaulting. Please note that all inventory fields are copies including all General, Itinerary, Payment Due Dates, Itin/Invoice Remarks, Agent Remarks in addition to each inventory detail item. The only fields that do not copy are the Inventory Record Number and the number sold.

Synchronization Related Enhancements:

*****Added the ability to synchronize with more than one remote location.** The synchronization utility can now be utilized to synchronize with as many remote locations (sync copies) as you desire. To start synchronizing with a new remote location, an "Initial Sync Out" must be performed at your primary database and a unique name must be assigned to each of your new Destination Databases (Sync Copies). The "Initial Sync In" must then be performed in each new remote location. From that point forward, each Copy database must synchronize with just the Primary Database and the Primary Database must synchronize with each of the Copy databases. For example, if you have 1 Primary database and 3 Sync Copy databases, the Primary Database will need to Sync Out and Sync In with each Copy database. Each Copy database will need to Sync Out and Sync In with just the Primary Database. (The changes made in each of the 3 Copy databases, will get included within the other Sync Copy databases, after each synchronize with the Primary database.)

Since managing and delivering synchronization files for multiple databases can become quite complex, we encourage all agencies utilizing the Synchronization utility to take advantage of our Sync Web Service, which provides you with an automated way of delivering files between your Primary database and your Copy databases through a secured connection. This Sync Web Service is a recent file delivery option in the Synchronization utility that can be automated via a scheduled task and acts as a post office handling the delivery of the synchronization files. Database synchronization has never been easier! If you are new to synchronization or are currently synchronizing but not yet utilizing our Sync Web Service, contact our support department (support@trams.com) and they will assist you with the setup.

Sneak Peak at Version 3.03

New Features

*****Added client Credit Limit checks to ClientBase.** This feature, when enabled, uses the TRAMS Back Office client profile field called Credit Limit along with the client account balance to determine if a client has exceeded their Credit Limit and if so warns your front line agents accordingly and disables the ability to generate further invoices without a form of payment.

Enabling this feature:
To avoid unnecessary querying, this feature is disabled by default, but can be enabled by going to Global Defaults|Credit Limit Prompting and placing a check within the setting called "Enable checking and prompting when Credit Limit is Exceeded".

How this feature works when enabled:
- Upon opening a client profile that has exceeded their credit limit (their account balance is greater than their credit limit entry in their TRAMS Back Office client profile) a

warning appears notifying the User. This warning also appears when a Res Card is created or when Merge to PNR is selected for a client exceeding their credit limit.
- The client Quick View screen has also been updated to include Credit Limit information if the client has a Credit Limit captured within their TRAMS Back Office profile. The Quick View screen includes the client's Credit Limit, Account Balance and Available Credit.
- If a client has exceeded their credit limit, upon generating an invoice with no payment the system will prompt with the following: "This account has exceeded its credit limit. OK" and will not allow the user to generate the invoice unless their advanced user permission settings (described below) allow for overriding this message.

Advanced User Permissions relating to Credit Limits:
Two new settings have been added to that Advanced User permissions area within the Other Permissions tab of a User Login including:
- "Disable Client Credit Limit, Balance and Available in QuickView"
- "Allow Invoice override for exceeding Client Credit Limit"

Enhancements
*****Added a Spell Check feature to ClientBase!** Several dictionaries have automatically been installed onto each workstation running ClientBase providing you with the ability to identify misspellings within Document Templates, Formatted Text E-mails and Profile Remarks. By default, while typing within any of these three areas, the spell check feature will automatically underline each misspelled word. Right click on a misspelled word and you will be offered suggested spellings along with the ability to Ignore, Ignore All or Add to Dictionary. In addition a Spell Check button ("ABC")has been added to the toolbar of each of these features (Document Templates, Merge to E-mail and Profile Remarks) allowing you to run the spell check routine across all data captured.
Customizing Your Spell Check Utility:
Although the spell check utility is automatically activated within Document Templates, Merge to E-mail and Profile Remarks, you can customize your spell check settings by going to Utilities|Spell Checker.
Dictionaries: Several different language dictionaries have automatically been installed, although by default only the General English dictionary as been enabled. From this area you can add, enable, disable or remove dictionaries. Note, all dictionaries have been installed within the My Documents\TRAMS\Dictionary directory.
User Dictionaries: A blank user dictionary is also automatically installed where you can customize the dictionaries used when running spell check to include words not currently in the General Dictionaries. When running spell checker if a word not recognized is "added to dictionary" the word is saved within this "user dictionary".
Options: By default your spell checker is set to "Ignore ALL CAP words", "Ignore Words with Numbers", "Highlight misspelled words". Remove the check from these settings to change the default.

*****Added a new field to the Family Member/Employee tab called Salutation/Nickname.** This field allows a salutation or nickname to be entered for each family member or employee. The Salutation/Nickname can be viewed in the Profile Manager results by adding the column to the query screen. Once a Merge to PNR rule is setup, the Salutation/Nickname can be merged to the GDS. Level 2 and 3 queries contain a filter for this new field, so you can query by your client's nickname. Also, this field has been added as a merge field (Fam/Emp Salutation) that can be used on labels, document templates, and emails.

*****Added a new setting to Global Defaults called Credit Card Settings designed to give you the ability to disable as well as clear the Credit Card field called "Security Code"** located within the Cards tab. Recent credit card policies strongly discourage businesses from storing a credit card security code within any kind of database. As a result of this policy we have defaulted this setting to disabled upon installing this update. Although discouraged, if you would like to re-enable this field, then go to Global Defaults|Credit Card Settings and place a check next to "Enabled". To clear all existing Security Code field entries from all existing Credit Card records within your database we have provided you with a button called "Clear All Credit Card Security Codes" within the Global Defaults|Credit Card Settings area. Running this process will permanently remove all Credit Card Security Codes from your database.

*****Added the ability to Global Modify Activities (Notes, Reminders and Mailers).**
From the results of a query generated from the Activity Manager, you can now globally modify any of the fields within those results using our Global Modify utility located within Utilities|Global Modify. Now, if an Agent leaves your agency and you want to reassign all open Reminders to another agent, Global Modify them all rather than changing one by one. Or, if you have a group of Reminders that you just completed and want to mark closed, Global Modify them all rather than closing one by one.
Steps to using:
After using the Level 1 or Level 2 Query to locate the Activities to Global Modify go to Utilities|Global Modify and set Records to Modify to Activities. From here you have two different global modify features to choose from.
1) What to do: Set Value
- This feature allows you to designate what type of Activity within your results to modify, Notes, Reminders or Mailers (you can only globally modify one type of activity at a time), along with the ability to select which field within that type of record you would like to modify. Finally, a listing of the fields within that type of activity appear for you to set a common value. Once these settings are complete, you have the ability to identify which records in the Activity Manager to modify based on either all current results, only selected results or a range of results.
2) What to do: Convert Type
- This feature allows you to turn Notes into Reminders or Mailers, Mailers into Notes or Reminders and Reminders into Notes or Mailers. First designate what type of Activity within your results to convert, Notes, Reminders or Mailers (you can only globally modify one type of activity at a time). Then select what type you would like to convert them to. Once these settings are complete, you have the ability to identify which records in the Activity Manager to modify based on either all current results, only selected results or a range of results.

Once all settings are complete click the Global Modify Now button and a count will appear identifying the number of records modified, skipped and the total. Records skipped are a result of having multiple types of Activities within your current query results.
*Important Note: Using any of the Global Modify features should be done with extreme care. Massive changes to your database can be accomplished with a single click. If you are in any way unsure of the expected results of running Global Modify, be sure to backup your database using the TRAMS IBBackup utility just before running it.

*****Enhanced the Activities tab located within a Res Card, so that they include the same features the Activities tab at the profile level includes.** Now you can easily filter the Activities associated with a Res Card using the bullets located at the top of the Activities tab including "All Activities", "Mailers", "Notes", "Reminders", "Open Reminders". A Remarks preview pane was also added to the right of the Activity listing so that you can arrow through your activities and easily preview the detailed remarks for each.

*****Added the ability to store, select and print Invoice, Itinerary, Trip Proposal, Trip Statement and Receipt REMARKS at the Vendor, Client and Agent profile level in addition to the current Branch level.** For example, if you would like Carnival's specific cancellation policy to print on any invoice that involves Carnival, you can now capture Carnival's policy within the new tab within the Carnival Vendor profile called Res Card Remarks. You can also capture client specific or agent specific Remarks as well within the Client and Agent profile tab called Res Card Remarks. Whenever an invoice|itin|trip proposal|trip statement|receipt is issued for that Vendor, Client or Agent these profile level Res Card Remarks will print accordingly.
Setting Up Your Vendor|Client|Agent Res Card Remarks:
1. Retrieve the desired Vendor, Client or Agent profile.
2. Click on the Res Card Remarks tab.
3. Click on add and complete following fields:
Description: Enter a brief 15 character description of the Remark.
Always Print: Place a check here if you would like these Remarks to print by default. Leave this field unchecked if you would like to force the User to select this Remark to print at the time of printing the document.
Include Remarks On: You can create different remarks for different documents. Select which document you would like to include this Remark by placing a check within Invoice, Trip Proposal, Itinerary, Trip Statement or Receipt.
Remarks: Enter your free flow remarks here. There is no limit to the number of characters.
4. Click OK to Save
5. Add multiple remarks for each profile and arrange the desired ordered by highlighting a Remark from the listing and clicking the blue arrows to the right of the Res Card Remarks listing to move it up or down in position with the other Remarks.
Printing Your Vendor, Client and Agent Res Card Remarks
-Invoices: From the Generate Invoice screen, click on the Remarks button to access all Remarks including Branch, Agent, Vendor and Client Remarks applicable for this

Invoice. Place a check in the Select box to include any optional move Remarks. You can also access your Remarks settings by clicking the Invoice Format button.
-Trip Proposals: Upon clicking the print Proposal button and selecting your desired Format, click the Trip Proposal Format button to view or select the desired Branch, Agent, Vendor and Client Remarks. (You can also access your Format Settings from this area as well.)
-Itineraries: Upon clicking the print Itinerary button and selecting your desired Format, click the Branch/Profile Remarks button to view or select the desired Branch, Agent, Vendor and Client Remarks. Please note that Vendor Remarks do not print on the Day by Day Itinerary formats.
-Trip Statements: Upon clicking the print Trip Statement button click the Branch/Profile Remarks button to view or select the desired Branch, Agent, Vendor and Client Remarks.
-Receipts: From your client Profile issue Receipt feature, click the Remarks button to view or select the desired Branch, Agent and Client Remarks.

*****Expanded all Remarks areas of a Res Card so that there is no longer any limit to the number of characters that can be captured.** This includes Agent Remarks and Client Feedback at Res Card level and Itin/Invoice Remarks and Agent Remarks at the Reservation and Service Provider levels.

*****Added a new button to the Res Card called "Proposal" and moved the "Client Quote" Itinerary formats from the Itinerary button to this new Proposal button.** Now the client quote formats are more obvious and can include their own set of default Remarks (Branch, Agent, Vendor and Client).

*****Added a new format for generating client quotes (also referred to as trip proposals) from ClientBase Res Card called "Client Quote Invoice Style".** To print this type of client quote format from any Res Card click the Print Itinerary button and select the Format "Client Quote Invoice Style". This format uses the same reporting tool and format settings as the Generate Invoice feature, but simply prints a client quote and does not generate an invoice or update trip balances in any way. This is the perfect way to provide a format friendly print out of reservations you have made but does not have to coincide with receiving payment from your client. This format can be printed, or e-mailed. If e-mailed a plain text version is included in the e-mail body and the formatted version is included as a .pdf attachment.
Customization to the hard coded format can be made with the following format settings. Further editing to the document can be made by clicking the "View in Word" button on the preview screen.
- Include Service Provider Graphics
- Hide Reservation Vendor Name
- Hide Reservation Totals (only include Res Card Trip Total)
- Print Service Fee as Trip Total Line Item
- Service Fee Label: [User Definable]
- Print [Air|Hotel|Car|Cruise|Insurance|Misc|Rail|Tour|Transportation] in Condensed Format (can be set per Travel Category)

Please note that this format can be set up as the default Itinerary format and the format settings can be customized by going to Utilities|Branch and clicking on the Itinerary Settings|Format Settings.

*****Added a new Invoice format setting called "Print Service Fee as Invoice Total Line Item" giving you greater flexibility in customizing the print out of an invoice with Service Fees.** If checked, this setting will add any Reservations with a Travel Category of Service Fee and print as a single total amount listed within the Invoice Totals just underneath Reservation Totals, rather than listing as a separate reservation within the body of the Invoice. Default Invoice and Itinerary Format Settings are captured by Branch within the Utilities|Branch area of ClientBase and can be overwritten on an invoice by invoice basis by clicking the Invoice Format button on the Generate Invoice screen.

*****Added a new Invoice format setting allowing you to customize how Service Fees are labeled on your Invoices.** This is a free flow field that allows for up to 25 characters and provides you with the ability to customize how agency service fees are labeled on the invoice. Default Invoice and Itinerary Format Settings are captured by Branch within the Utilities|Branch area of ClientBase and can be overwritten on an invoice by invoice basis by clicking the Invoice Format button on the Generate Invoice screen.

*****Expanded our Invoice Format Settings to include a new setting, broken down by Travel Category, called "Print Reservation in Condensed Format".** If checked, upon invoicing a Reservation for that Travel Category a summary of basic Reservation information is included, rather than a detailed listing of all Reservation and Service Provider level information. This setting may be desired for Reservations that you would like to place less emphasis on when printing invoices for your client. For example, if you are invoicing a cruise vacation, you may choose to place a greater emphasis on the cruise reservation and less emphasis on the Insurance, Airport Hotel etc. Default Invoice and Itinerary Format Settings are captured by Branch within the Utilities|Branch area of ClientBase and can be overwritten on an invoice by invoice basis by clicking the Invoice Format button on the Generate Invoice screen. By default none of these settings will be checked upon installing this update.
Below is a listing of the Reservation details included if "Print Reservation in Condensed Format" is checked. All other Reservation and Service Provider level data is omitted from the printed version of the invoice.
- Vendor Name, Passenger Name/s, Start Date, End Date
- If Supplier, ARC or Comm Track Show as Paid: Res Amount, This Invoice, Prior Invoice and Balance
- If Comm Track Not Show as Paid: Amount Details

*****Added a new Invoice format setting called "Hide Vendor Name" giving you greater flexibility in customizing the print out of an invoice.** If this setting is checked, then the Vendor Name for each individual Reservation within the Res Card being invoice will not be printed, only the Service Provider Names. The default for this setting can be updated by going to Utilities|Branch and updating the Invoice Format Settings. The

Branch default can be overridden on an Invoice by Invoice basis by clicking on the Invoice Format button on the Generate Invoice screen.

*****Added a new Invoice format setting called "Hide Reservation Totals (Include Only Invoice Totals" giving you greater flexibility in customizing the print out of an invoice.** If this setting is checked, then each individual Reservation amount will not be printed, only the sum of all Reservations being invoiced. The default for this setting can be updated by going to Utilities|Branch and updating the Invoice Format Settings. The Branch default can be overridden on an Invoice by Invoice basis by clicking on the Invoice Format button on the Generate Invoice screen.

*****Added a Copy and Paste button to the Branch setup area of the Utilities menu.** To help streamline the process of setting up multiple branches within ClientBase the Copy and Paste feature has been added. If you would like to setup a new branch and would like to default it's settings to the settings of an existing branch that you have already setup, highlight the existing branch from within the Utilities menu and click the "Copy" button. Next, highlight the new branch number that you would like to add and click the "Paste" button. All branch fields and settings will be overwritten with the defaults from the branch copied, except for address, communication entries, Branch ID, Next Sales and Refund Invoice # in the General area. Nothing is saved until OK is selected, so please review all areas of the branch settings before clicking OK to ensure you have not lost any information that you may not have realized got overwritten with the Paste feature.

*****Further enhanced the formatting of Reservation Itemization information for printing on Invoices and Itineraries:**
- Expanded the field length of the Description field within Itemization from 40 characters to 100 characters.
- Added a checkbox called "Print on Invoice" to the Remarks area of Itemization so that you now have the ability to print the Remarks for your customer, if desired.
- Enhanced the formatting of Itemization Description on Invoices and Itineraries so that the full length of the description will be printed by wrapping the text within the field width of that column.
- Enhanced the formatting of Itemization on Invoices and Itineraries so that Passenger Names are printed on a separate line and do not get truncated.
- Suppressed the printing of an entire line item in Itemization if line includes only Commission Amount. Any itemized amount that has commission only will not appear on invoices and itineraries.

*****Made several changes to the Res Card Trip Statement to provide greater flexibility in formatting:**
Enhanced the Trip Statement format so that all Reservation Amounts, Payment Amounts and Balance is now right justified.
-Added a new field called Reference to the Trip Statement which includes the client's profile number/ the Res Card number. For example, Reference: 2398/590 would represent a Statement for Client # 2398 and Res Card # 590.

-Added a new setting to Trip Statements called "Include Reservation Details". If this setting is checked, then a more detailed summary of the Reservation is printed on the Trip Statement, including Itemization (if captured) and a one line summary for each Service Provider record.
-Added a separate set of Branch Remarks specifically for Trip Statements. This table of Remarks can be accessed by going to Utilities|Branch, selecting the desired Branch and clicking on the Trip Statement Settings for Remarks. The Branch Remarks can be overridden on a Trip Statement by Trip Statement basis by clicking on the Remarks button when launching a Trip Statement from a Res Card.

*****Enhanced the Day-by-day itineraries available in the Res Card "Print Itinerary" feature to include 2 formats, one called "Day-by-day Sorted by Depart and Arrive" and one called "Day-by-day Sorted by Depart Only".** The Day-by-day itinerary sorted by Depart Only is a new format available in this release that sorts the entire itinerary, across all Reservations and Service Provider records based upon departure dates. All arrival information is included within the details of each itinerary item. This new formats provides you with a seamless method for printing a detailed itinerary for your clients to include with your trip proposals or with documentation prior to departure. A template format is generated that provides you with the ability to customize these reports even further including the ability to paste graphics or additional comments and descriptions.

*****Expanded the table of Remarks within the Branch settings so that a separate table of Remarks can now be established for Invoices, Itineraries, Trip Statements and Receipts.** Upon installing 3.03 all current Remarks will default into both the Invoice Remarks and the Itinerary Remarks. On-going customization of Remarks is now made within the specific area under either Invoice Remarks, Itinerary Remarks, Trip Statement Remarks or Receipt Remarks.

*****Added the ability to automatically launch the Live Connect screen when a vendor linked to a Live Connect provider is selected within a Res Card Reservation.** This feature can be disabled by going to Global Defaults | Default Field Values for Res Cards | Reservations and removing the check in the setting called "Automatically launch Live Connect for Live Connect Vendors".

*****Added a new checkbox to the More Taxes tab of a Reservation called "Print Plus Applicable Taxes'".** This checkbox is only visible if the Tax total for the reservation is zero. If this new setting is checked and if Amount Details are captured within the Reservation (per xx pricing is checked) then upon printing the Amount Details on the Invoice/Itinerary (Plus Applicable Taxes) will appear after the pricing. This setting can assist with hotel or car type reservations where the exact tax amount charged upon check-in is not known, yet you want to let the customer aware of the fact that there could be additional taxes.

*****Added a new setting to Global Defaults|Default Field Values for New Invoices called "Save ALL Invoices to Branch X".** This new setting allows an agency to setup multiple branches with different headers/footers, default remarks and format settings within ClientBase but still save all invoices to a single branch in TRAMS Back Office. This setting works well for agencies with IC's that want different invoice defaults in ClientBase but still need all accounting data to land in one branch.

*****Enhanced the Global Modify feature for Res Cards to include more fields for modifying.** Added Agent, Marketing Source, Group, Branch, Trip Name, Locator No and Region/Destination to the list of fields you can now set a new value to via the Global Modify feature. (Previous versions included the ability to Global Modify Status and Res Cycle only.)

*****Added a new field to Cruise and Hotel type Service Provider records within the Res Card Reservation called "Bedding".** If completed, this new field will print on Invoices, Itineraries and Client Quotes.

***** Updated Attachments so that in addition to clicking "Open Attachment" you can now also double click on the attachment within the list view, to open and view the attached file.**

***** Updated Attachments so that modifications to a file launched from ClientBase Attachments can get saved automatically back into ClientBase.** If an attachment is opened and then modified and saved, upon closing the attachment you land on the attachment settings Window. Clicking OK from this settings window will save the newly modified file back to ClientBase.

*****Added a new setting called Status to the Live Connect Provider record, which allows you to set unwanted Live Connect Providers as "Inactive".** This gives you the ability to remove certain Live Connect Providers from the listing when launching Live Connect from the Res Card level. All current Live Connect Providers default to Active.

<u>**Profile Import Utility Enhancements:**</u>
*****Updated the ASCII Profile Import Utility to include the ability to import "Special Dates" along with other profile data.** A new Special Dates screen has been added to the import wizard including the following fields for mapping:
Special Date Type: Select from the drop down list of Special Date Types created in your ClientBase database (e.g. Wedding Anniversary). Please note if the desired Special Date Type is not included within the drop down, you must first go to ClientBase, and from Global Defaults|User Defined Fields, select Special Date Types and add to the default drop down list.
Source Column: Select the column within the file you are importing that represents the special date entries.
Source Date Separator: Select between "/", "-", or "." to identify the format used within the date fields in your source file.
Source Date Format: Select from the following to identify the format used within the date fields in your source file.
mm/dd/yy
mm/dd/yyyy

dd/mm/yy
dd/mm/yyyy
yyyy/mm/dd
yy/mm/dd
yyyy/mm/dd
dd/mmm/yy
dd/mmm/yyyy
Based on these date settings the special date in your file will be mapped to a separate Month, Day and Year field within the ClientBase Special Dates record.

Hot off the Press…still in Development at the time of this document
3.03 Final Enhancements

***Enhanced the Dupe Check routine so that upon merging a dupe into a master, a complete listing of all profile tabs appears for you to choose what data to merge from the dupe to the master.
***Enhanced the Dupe Check routine so that you can now "Auto Set Master" for all dupe results and "Merge All" at one time.
***Added "Disable Viewing Other Type Profiles" to Advanced User Permissions
***Added "Go to Profile" buttons next to Vendor and Service Provider profiles in Reservation.
***Added ability to e-mail Invoices and Client Quote Invoice style as HTML within the body of the e-mail.
***Added "Save As Res Card Attachments" to all Res Card documents (Invoices, Trip Proposals, Itineraries, Trip Statements).
***Added the option to print an Invoice in Spanish or French in addition to English.
***Added Invoice Agent and Res Card # to Header Footer merge fields
***Enhanced the Detailed Client Profile Report to include more profile data.
***Added an option to include Reservation pricing itemization to the Client/Vendor/Agent Activity Reports.