Manage the Trip Planning Process with Res Cards

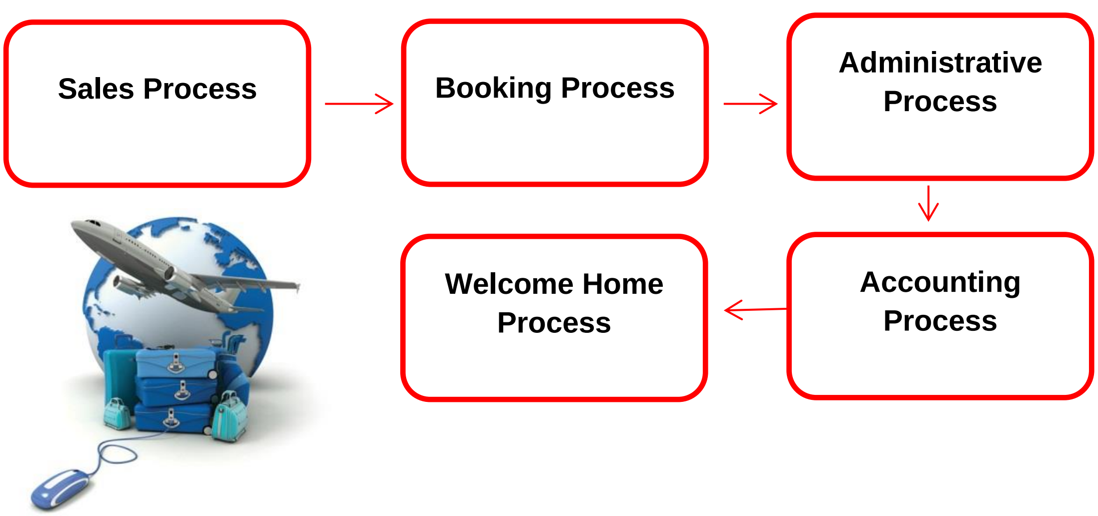
As your agency implements *ClientBase Online* and begins reaping the rewards of improved customer relationships and effective marketing programs, your leisure travel sales should start increasing. To help you better manage this increasing volume of business and track the leads generated by your marketing programs, the *Res Card* has been created. Think of the *ClientBase Online* Res Card as a home for the many details involved in planning each and every trip for your customers and as a tool that will help you manage the entire trip planning process.

Regardless of the technology your agents use or don't use, regardless of your niche or type of business, regardless of how long your agents have been in the business, there are certain fundamental components involved in the *trip planning process*. The *ClientBase Online* Res Card has been designed to help agents through each process with the objective of making agents more efficient and effective. In the past, agents may have concentrated more of their attention on just the Booking Process, but with the advent of airline commission caps, there has been a new emphasis on leisure bookings and a greater need to manage these leisure sales.

The Res Card feature in *ClientBase Online* provides a perfect tool to integrate all processes in trip planning. By setting up a Res Card, an agent can document the client's first call by creating a *Res Card* and scheduling a follow-up call (listed on the daily to-do list) with a *Reminder.* Once the customer is considering the trip, the agent can capture details of reservations and print out client quotes or itineraries. By using the Live Connect feature in ClientBase, agents have the ability to book reservations via on-line booking engines and then pull all that reservation detail back into the Res Card.

When the client books the trip, the agent can produce invoices and trip statements, while tracking invoiced and un-invoiced balances. Additional notes and reminders can be created to remind an agent of a final payment date or a document confirmation. When the customer returns home, the agent can document his remarks and suggestions. Because all client trip data is in one localized area, reports such as Final Payment, Vendor Booking and Service Provider Activity can be produced for Res Cards in all stages of implementation of the trip planning process.

Managing the Trip Planning Process



Steps for successfully entering Res Card Information:

1. For every new trip inquiry, edit/create a new profile and then create a new Res Card and Trip Inquiry Reminder as learned in Packet 3.

   - Res Card Cycle (change to *Booked)*
   - Group

2. When client books the trip and if a Res Card already exists for this customer, open it either through the Reminder, or in the Profile Res Card tab. Fill in Key Fields in Res Card:

   - Trip Name
   - Region/Destination
   - Passenger Name – Insert from Profile, and add other travelers

3. Create new Reservation and input vendor, trip prices and trip dates.

4. Click Batched Reminders to automatically schedule deposit due, final payment, check documents, welcome home calls, etc.