

CB Adding Remarks & Attachments

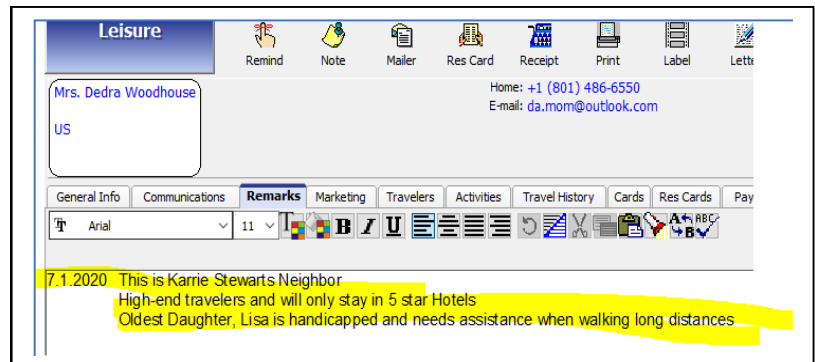
Adding Remarks to a Profile

Add Important Client-related remarks at the Profile Level. These remarks are not related to a specific Trip, but good info for other advisors to know if they were helping your client.

Step 1 – Pull up the Clients profile (or build one if needed), click on ‘Remarks’ tab and freeform remarks.

***Always Date your Remarks.*

Step 2 - Click Apply to ‘Save’ remarks



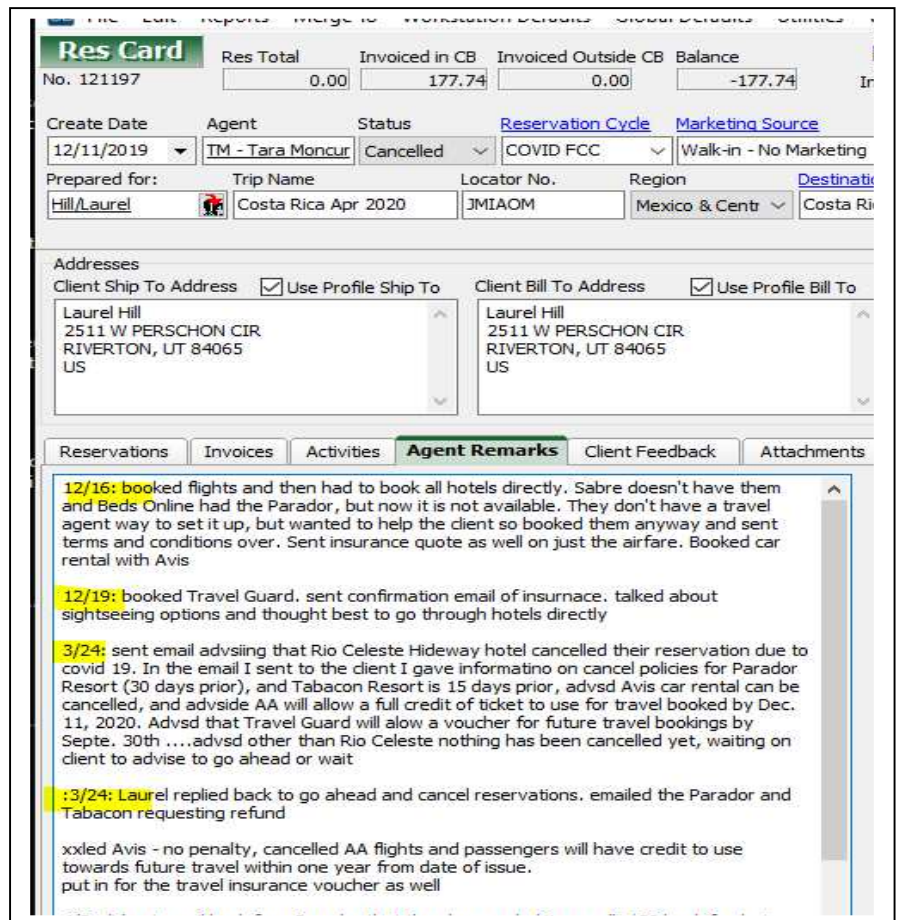
Adding Remarks to a ResCard

Add all important Trip-related conversations (including Clients, vendors, etc.) to the ResCard Remarks. For instructions to attach email conversations, trip docs, Invoices, etc. see page 2.

Step 1 – Pull up the Clients profile (or build one if needed), click on ‘Remarks’ tab and freeform remarks.

***Always Date your Remarks for obvious reasons!*

Step 2 - Click Apply to ‘Save’ remarks



Inquiries & Quotes Res Cards: Please follow the same steps. Building a Res Card at the Inquiry or Quote level is important as it allows you to Date and make Notes about initial conversations with the Client. This helps other advisors identify who originally spoke with the client, provides Marketing opportunities, & helps you remember!

Attaching Important Documents and Communications to the ResCard:

Step 1 (saving to your desktop):

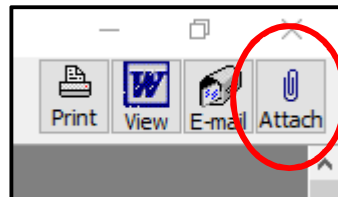
1. Open the email or document you want to attach to ResCard.
2. Click on file (top left)
3. Click on "Save As"
4. Make sure your desktop is highlighted
5. Make sure your filename is correct
6. Click "Save"

Step 2 (Attach to CB ResCard):

1. Go into CB
2. Open ResCard
3. Click on Attachment TAB
4. Click on Add
5. Click on "Browse for attachment"
6. Find the File and Double Click
- Tip: Click on 'Sort by Date' to bring Doc to top of list*
7. Press Okay

Attaching a CB Invoice to the ResCard:

After invoicing in CB, click on the 'Attach' button (right hand corner). This will attach the invoice to your Res Card.



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You will see all attachments by clicking on the Attachment Tab in the Res card.

Reservations	Invoices	Activities	Agent Remarks	Client Feedback	Attachments	More Fields	Edit Hist
Description	File Name	Directory Path					
Invoice No. 2394972	Inv210810124546719.PDF	C:\Users\kstewart\AppData\Local\Temp\CBPLUS\					