

Charging a Misc. Service Fee in CB

Step 1: Log into CB & Create the ResCard

ClientBase - Sabre, Inc. - [Res Card]

File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

Res Card Res Total Invoiced Total Balance
No. 123008 0.00 0.00 0.00

Create Date Agent Status Reservation Cycle Marketing Source Group Branch No.
2/17/2020 SK - Karrie Stewa Active Quote E-Blast [38] SL Leisure WH5B

Prepared for: Trip Name Locator No. Region Destination Trip Start Date Trip End Date
Stewart/Karrie Cancun 2020 Mexico & Centr Cancun

Addresses
Client Ship To Address Use Profile Ship To Client Bill To Address Use Profile Bill To
Karrie Louise Stewart 515 S 700 E, Ste 1B Salt Lake City, UT 84102
Karrie Louise Stewart 64 Keel Court Stansbury Park, UT 84074-8953 US

Travelers
Stewart/Karrie Louise
Stewart/Andrew
Stewart/Keith
/

Reservations Invoices Activities Agent Remarks Client Feedback Attachments More Fields Edit History

Booking St...	Type	Res Date	Vendor

Add Modify Delete Pass PNR Live Connect Inventory Service Fee

Res Total Invoiced Total Balance Comm Total Net Total
All Confirmed Reservations 0.00 0.00 0.00 0.00 0.00

1) Click on the service Fee Button

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Step 2: Fill out service Fee information

The screenshot shows the 'Reservation' window with the following fields highlighted:

- 1**: Vendor dropdown menu set to 'Itation Service Charge'.
- 2**: Travel Category dropdown menu set to 'Service Fee'.
- 3**: Base amount input field set to '50.00'.
- 4**: Commission percentage input field set to '50.00'.
- 5**: OK button at the bottom of the window.

The 'Service Provider' tab is also visible, showing 'Professional Consultation Service Charge' as the selected provider.

Item	Amount
Fare	\$50.00
Base	\$50.00
Tax	\$0.00
Comm.	\$0.00
Net Fare	\$50.00

1) **Vendor:** will default to: 'Professional Consultation Service Charge'

2) **Travel Category:** Will default to "Service Fee". Use Drop down menu to choose applicable category.

3 & 4) **Base & Commission:** Change Base to amount you want to charge. Make Commission box Match exactly.

5) **Click OK**

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Step 3: Prepare for Invoicing

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Click Decline Insurance

Insurance Prompt

No Insurance Reservations exist for this trip. Accept or Decline Insurance

Accept Decline

Booking St...	Type	Res Date	Vendor
Confirmed	Service ...	2/17/2020	Professional Consultation Service Charge

- 1) Click Apply to apply changes
- 2) You will see a 'Professional Consultation Service Charge' line item in the Res Card. Highlight it.
- 3) Click on the INVOICE button

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Step 4: Continue Preparation for Invoicing

The screenshot shows the 'CB Invoice' window. At the top, there are fields for 'Issue Date' (2/19/2020), 'Branch Remarks' (with a dropdown menu), and 'Invoice for'. Below this is the 'Invoice Payment' section with 'Form of Payment' set to 'CC Merchant' and 'Check/CC Number' set to 'VI 48-XXXX-7696'. A table below shows 'Invoice Totals' and 'Commission Tracking Totals'. The 'Invoice Totals' table has columns for Base, Tax, Commission, and Total Fare, with values of 50.00, 0.00, 50.00, and 50.00 respectively. The 'Commission Tracking Totals' table has columns for Base, Tax, Commission, and Total Fare, with values of 0.00, 0.00, 0.00, and 0.00 respectively. Below the tables is a list of items with columns for Select, Category, Vendor, Traveler, Confirmation No, Depart Date, Return Date, Agent, and Traveler Name. The first item is 'Service Fee' with Vendor 'Professional Consultatio' and Traveler 'Stewart/Karrie Louise'. Below the list is a 'Reservation Total' section with a 'Sale' radio button selected. It has columns for 'Not yet Invoiced' and 'This Invoice' with values for Base, Tax, Comm, and Total Fare. At the bottom, there is a 'Travel Type' dropdown set to 'Fee Consultation', a 'Submit To' dropdown set to 'Supplier', an 'Agent' field with 'SK - Karrie Stewart', and a 'Generate Invoice' button.

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1) Highlight the Service Fee by Clicking the select box.

2) Change Form of payment box to CC Merchant

3) Add Credit card from Drop down Menu.
(DO NOT add Credit Card number manually. Add Credit Card to Client profile before invoicing.)

4) Change Travel Type to correct description. *(scroll down to find Fee options)*

5) Make sure 'Submit to' is defaulted to 'Supplier'.

6) Click "Generate Invoice"

MORRIS MURDOCK

TRAVEL

Karrie Louise Stewart
64 Keel Court
Stansbury Park, UT 84074-8953
US

Invoice No. : 2370277
Invoice Date : 2/18/2020
Travel Consultant : SK - Karrie Stewart
Group No. :
Page No. : 1
Interface ID : 4358826927

Consultation Fee

Vendor : Professional Consultation Service Charge No. of Travelers : 4
Travelers : Stewart/Karrie Louise; Stewart/Andrew; Stewart/Keith; /



Service Fee

Professional Consultation Service Charge

Reservation Totals	\$	50.00	<u>Total</u>
Prior Invoiced Totals	\$	0.00	
This Invoice Totals	\$	50.00	
	Paid By Credit Card VI 48-XXXX-7696:	\$	(50.00)
	Balance:	\$	0.00

*Internal Vendor Payment Remark - N/A

Thank You For Choosing Morris Murdock Travel

Ask your agent about NEW PASSPORT requirements for International travel beginning December 31st, 2006.

Please review the above information, such as Name Spelling, Dates, Times and Pricing for accuracy.

Initial _____

Taxes and fuel surcharges are subject to change until tickets issued.

I have been offered and I have declined the purchase of: Trip Cancellation (including airline, cruise, and tour operator default) and travel accident/limited sickness/medical/trip interruptions insurance.

I, the undersigned will not hold MORRIS MURDOCK TRAVEL and/or its agents responsible for any expenses incurred by me resulting from delay/cancellation of my trip, accident, sickness, death, stolen or damaged baggage or property.

_____ Date _____

Client Signature

Fee Invoice
Example:

8/9/2021