Compass Travel

Making travel better

V1.1

A knowledge base is for employees of the Sales and Software Development departments, which support Compass Travel in the United Kingdom, Canada and the United States. Use it as a reference guide to dip in and out of whenever you need to assistance.

Contents

Introduction

Welcome to Compass Travel! Glad to have you aboard.

If you're new to Compass Travel, this knowledge base is for employees of the Sales and Software Development departments, which support Compass Travel in the United Kingdom, Canada and the United States. Use it as a reference guide to dip in and out of whenever you need to assistance.

- For the sales staff, there is information on how to use the SalesBuilder application to keep track of customer leads and improve sales.

- For those on the Software Development team, there is information about how to provide context-sensitive Help (CSH). As a result, application help can be available when the sales staff needs it most.

What's new

Dynamic Content Filtering

Now you can personalize the way you select content in this new Knowledge Base. This new feature uses Dynamic Content Filters represented by the filter icon show below. The topic, How to use the Dynamic Content Filters explains the easy steps to see just the content you want.

You can filter content by:

- Company Location (US, UK, Canada)
- Company Role (Sales, Software Developer)
- Travel Market Type (Corporate, Leisure, Other)

Compass Travel rebrand

We've had a makeover! In the coming months we will be rolling out our new branding and you will see a dramatic change in the use of our logo on our websites and in our flagship travel software application, SalesBuilder.
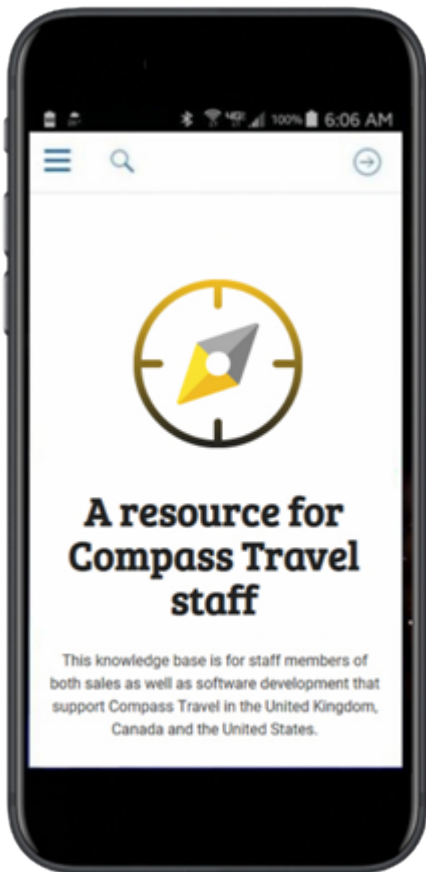
Our destinations

> **TIP** This topic shows all the locations from which Compass Travel operates.

Filter your selection to show only Corporate Locations that are relevant to your Sales territory.

- Corporate Locations

Canada

First Avenue
Anytown
Canada

United Kingdom

High Street
Anytown
UK

United States

First Avenue
Anytown
USA

About corporate travel

Travel is typically broken into two rather broad areas. These areas are known as leisure and corporate. Most folks are familiar with leisure travel and are typically oblivious to the fact that corporate travel exists. They never really give any thought to the fact that a lot of travel falls into the corporate category.

Some of the larger companies will have a dedicated Corporate Travel department that is staffed with employees that make the travel arrangements for the company's employees. Many companies need to make corporate travel arrangements but simply cannot justify maintaining a full time staff to support this role.

While corporate travel can take you anywhere the business needs to go, most often it occurs when needing to visit large cities such as San Francisco, CA, Denver, CO, Toronto, CAN and New York City.

About the corporate travel market

Compass Travel began to notice that a substantial number of its customers were making travel arrangements for destinations that weren't suited for leisure. Additionally, employees noticed an increasing number of questions about whether Compass Travel offered a "business discount". So we embarked on a process to discover whether we should consider offering specialized services to businesses. Thus, the Corporate Travel division was created to focus on these new business opportunities.

CORPORATE TRAVEL

What corporate services do we offer?

From flight bookings, ground transportation arrangements, car rental, arts and entertainment events to virtually any travel service you might need.

What sets us apart in the corporate travel market?

Compass Travel created the SalesBuilder application to assist the staff with managing sales. SalesBuilder allows employees to easily keep track of the small details that give the impression the business is dealing with a friend and not another business.

For example, detailed notes are kept for each individual that we have contact with. We send birthday cards at appropriate times. We remember and acknowledge anniversaries, children's and pet's names. We leave no stone unturned to instill confidence and establish that personal touch that helps to set us apart from other Travel companies.

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About leisure travel

Travel is typically broken into two rather broad areas. These areas are known as leisure and corporate. Most folks are familiar with leisure travel and are typically oblivious to the fact that corporate travel exists.

Leisure travel often occurs during family vacations where families travel to noteworthy locations such as Alcatraz Island, Iceland, London or Mesa Verde in Colorado.

Mesa Verde, Colorado

London
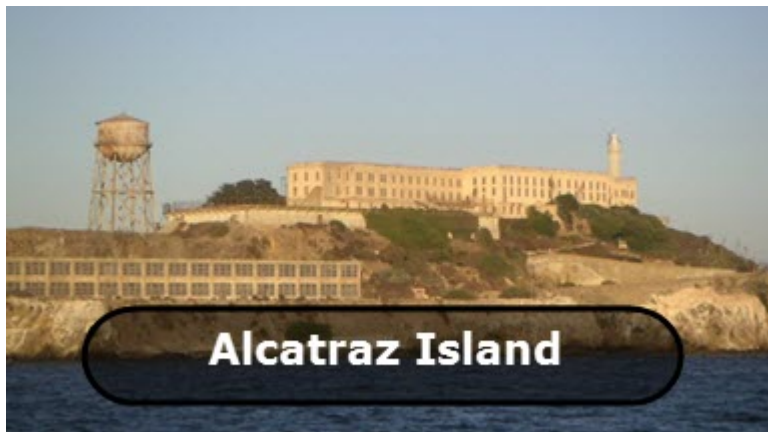
About the leisure travel market

Compass Travel began to notice that a substantial number of its customers were asking about making travel arrangements for destinations that weren't in the normal business realm. Additionally, employees noticed an increasing number of questions about whether Compass Travel offered "anything that children might enjoy". So we embarked on a process to discover whether we should consider offering specialized services to clients. Thus, the Leisure Travel division was created to focus on these new business opportunities.

Exploring Ancient Maya of Honduras

Visit a bird rescue, rehabilitation and release center.

Located on ten acres of forested terrain in a stream-fed valley, our multifaceted eco-tourism project is only 10 minutes away by vehicle from the central square of Copán Ruinas, Honduras.

What leisure services do we offer?

1. Flight Bookings (with complimentary and automatic checking for possible upgrades)
2. Delta
3. American

4. Southwest
5. Lufthansa
6. Ground transportation arrangements
7. Avis Car Rental
8. Super Shuttle
9. National Car Rental
10. Enterprise Car Rental
11. Downtown Airporter
12. Hotel Arrangements with negotiated rates
13. Marriott
14. Hyatt
15. Wyndham
16. Holiday Inn
17. Ramada
18. Entertainment arrangements
19. Las Vegas, NV
    - Hoover Dam
    - Golden Nugget Casino
20. Orlando, FL
    - Disney World
    - Universal Studios
21. Reminder communication for upcoming travel
22. Phone Calls
23. Text Messages
24. E-Mail Messages

About our software - SalesBuilder

Compass Travel has developed an internal CRM application for its worldwide sales staff called "SalesBuilder". This application allows them to keep track of customer leads and improve sales. For the sales staff, there is information in this section that will help them gain a better understanding of the software through specific eLearning material. There is also guidance on explaining new "travel products" to sales prospects and also instructions for using SalesBuilder.

Promotional travel market packages

Sales staff can earn extra bonuses!

Please feature these Travel Market Packages and earn extra bonuses.

- Filter your selection to show only the content that is relevant to the type of package you are trying to sell:
    - Corporate Travel
    - Leisure Travel
    - Custom

*NOTE: If you filter using **Canada** only, note that all locations disappear. This is because the filters are doing their job. There are no Canadian locations listed here.

Las Vegas Corporate Meeting Package		San Francisco Corporate Meeting Package	
- 5 nights in bed and breakfast lodging		- 5 nights in bed and breakfast lodging	
- Breakfast daily		- Breakfast daily	

|			
• Transportation to and from the convention center		• Transportation to and from the convention center	
Palenque, Mexico Archaeology Tour includes • 5 nights in bed and breakfast lodging • Breakfast daily, full dinners, some with beer or wine • Tour Director speaking English, Spanish and Japanese • Private motor coach • Guided sightseeing and admission fees	Palenque, Mexico	**Colorado Mountain tour includes** • 5 nights in bed and breakfast lodging • Breakfast daily, full dinners, some with beer or wine • Tour Director speaking English, Spanish and Japanese • Private motor coach • Guided sightseeing and admission fees	

Lake Annecy, France tour includes

Lake Annecy, France

- 5 nights in bed and breakfasts

- Breakfast daily, full course dinners with beer or wine

- Tour Director speaking English, French and Japanese

- Private motor coach

- Guided sightseeing and admission fees
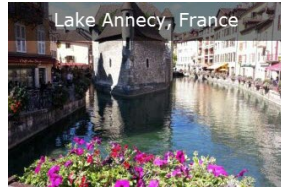
Mesa Verde special guided tour includes

- 5 nights in bed and breakfast lodging

- Breakfast daily, full dinners with beer or wine

- Tour Director speaking English, French and Japanese

- Private motor coach

- Guided sightseeing and admission fees

London tour includes

Windsor Castle, England

- 7 nights in five-star hotels

- Breakfast daily, 2 three-course dinners with beer or wine

- Tour Director speaking

Evergreen, Colorado Bed & Breakfast Package

- 5 nights in bed and breakfast lodging

- Breakfast daily, full dinners, some with beer or wine

English, French and Japanese

• Guided sightseeing and admission fees

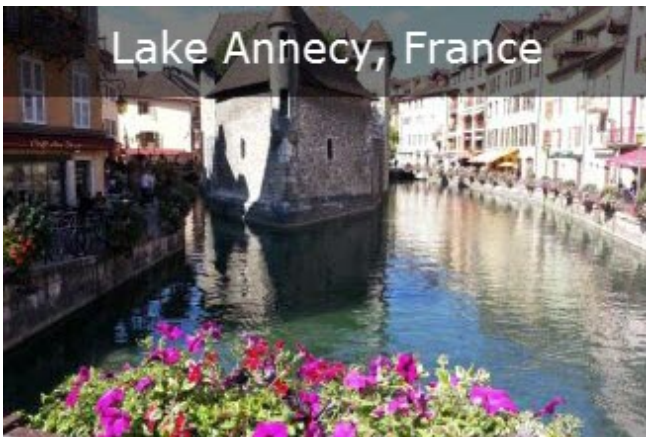• Tour Director speaking English, Spanish and Japanese

• Private motor coach

• Guided sightseeing and admission fees

Touring by air, rail or sea

Compass Travel

Lake Annecy, France

Palenque, Mexico

Bed and Breakfast, USA

Cruise Ship in Alaska

Chateau in France

Mesa Verde, Colorado

Windsor Castle, England

San Francisco, California

Flower Shop in Vancouver

Vancouver Boat Port


Hotel Room in Vancouver

Travel Club Amenities

Compass Travel "Travel Club" where members pay a yearly fee and can enjoy any of the club's fabulous amenities at no additional charge.

| Amenity	Location
Golf Course	• Los Angeles • Montreal • New York • San Francisco • Scotland • Vancouver
Hot Tub	• Los Angeles • Montreal • New York • San Francisco • Scotland • Seattle • Toronto • Vancouver
Mountain Climbing	• Edmonton • Montreal • San Francisco • Scotland • Toronto • Vancouver
SCUBA Diving	• New York • San Francisco • Scotland • Toronto • Vancouver
Swimming Pool	• Montreal • New York • Toronto • Vancouver

My Pipeline screen overview
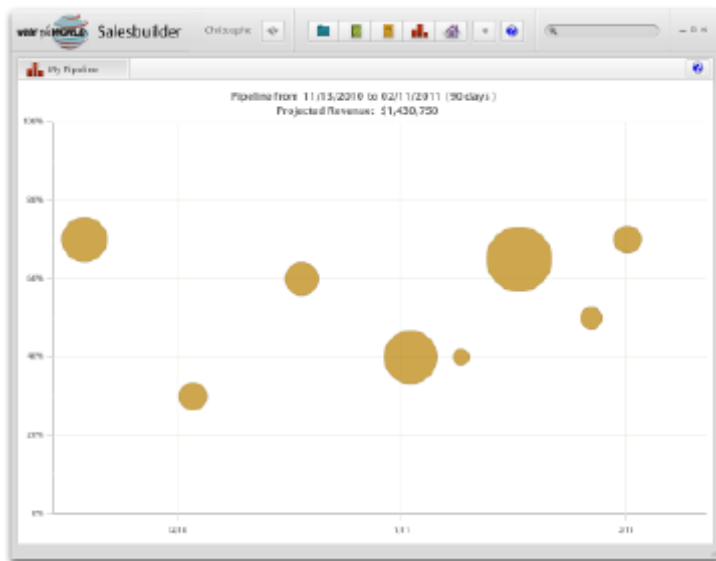
My Pipeline is generally the first thing you see after successfully logging into SalesBuilder. This view provides a graphical overview of your Accounts. In this view you are able to:

- Hover the bubbles to see an overview of the information.

- Click and drag the bubbles on the chart. As you click and drag the bubbles, the associated values are updated accordingly.

- Click the background of the chart and drag left or right to scroll the date activity.

- Click and drag lines on the chart to decrease the span between dates. This will bring the bubbles closer together.

Opportunities screen overview
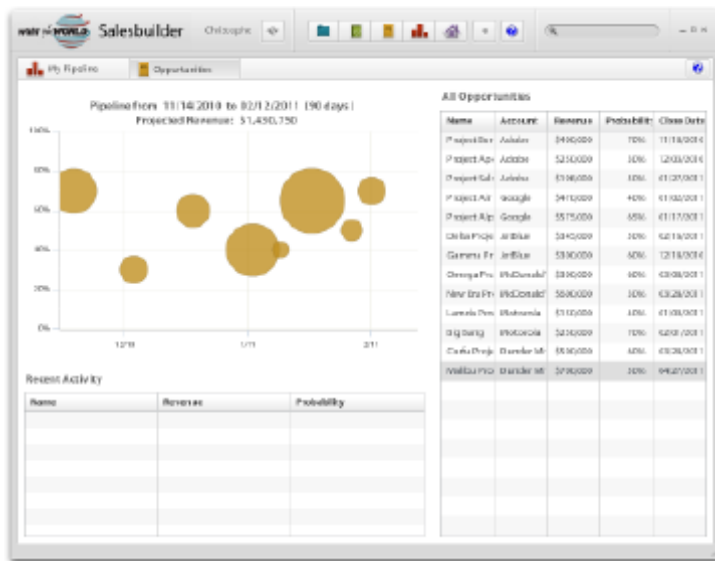
The Opportunities screen is viewed by clicking the Opportunities button in the main tool strip. This view provides a chart similar to the My Pipeline screen, a list of all Opportunities and an area listing any Recent Activity. In this view you are able to work with the chart in the same manner as you are able to in the My Pipeline screen.

New Account - General screen

The New Account - General screen is viewed by clicking the New Account button in the main tool strip, then clicking the General tab. This view provides a chart listing the Top 10 Accounts, a list of all accounts and an area listing any recent activity. In this view you are able to double-click any account to view more detailed information about the account. Such as where the account is projected to be, a map showing the account location, etc.

New Account - Contacts screen
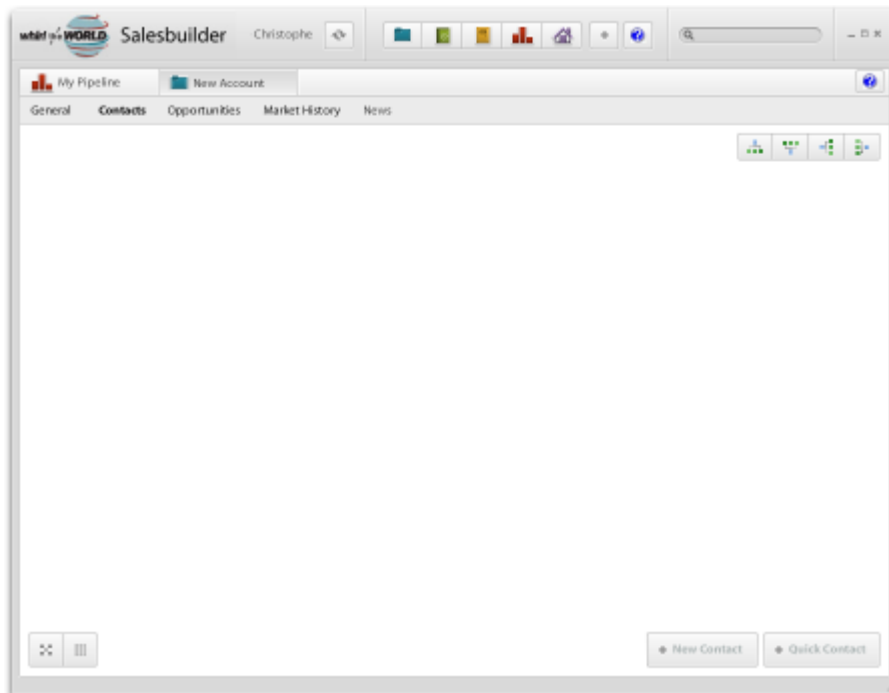
The New Account - Contacts screen is viewed by clicking the New Account button in the main tool strip, then clicking the Contacts tab. This view provides different ways of viewing the contact hierarchy of the new account. At the bottom of the screen are buttons that allow the SalesBuilder user to easily add Contacts.

New Account - News
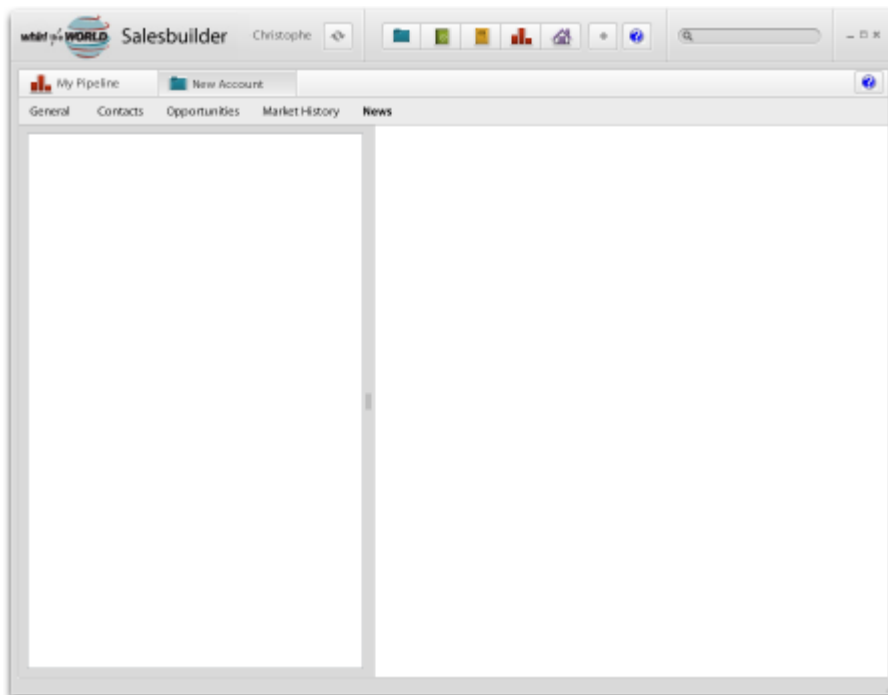
The New Account - News screen is viewed by clicking the New Account button in the main tool strip, then clicking the News tab. This view provides any newsworthy items for your viewing pleasure.

New Contact - General screen

The New Contact - General screen is viewed by editing an Account, clicking the Contacts tab and clicking the New Contact button in the lower right corner of the dialog. This view provides the ability to enter all information related to the Contact that is being added. Most fields are easily identified and therefore no help is provided for them. However, there are a few areas that may require explanation.

There is an area that allows an image to be added. It is intended to be the image of the contact. If you have the image stored on your operating system as a file, you may drag it from the operating system to the image area to insert and add it to the database. If you are visiting a client location, you may ask the client to sit in front of a camera connected to the PC and the image may be obtained that way as well.

New Contact - Notes screen
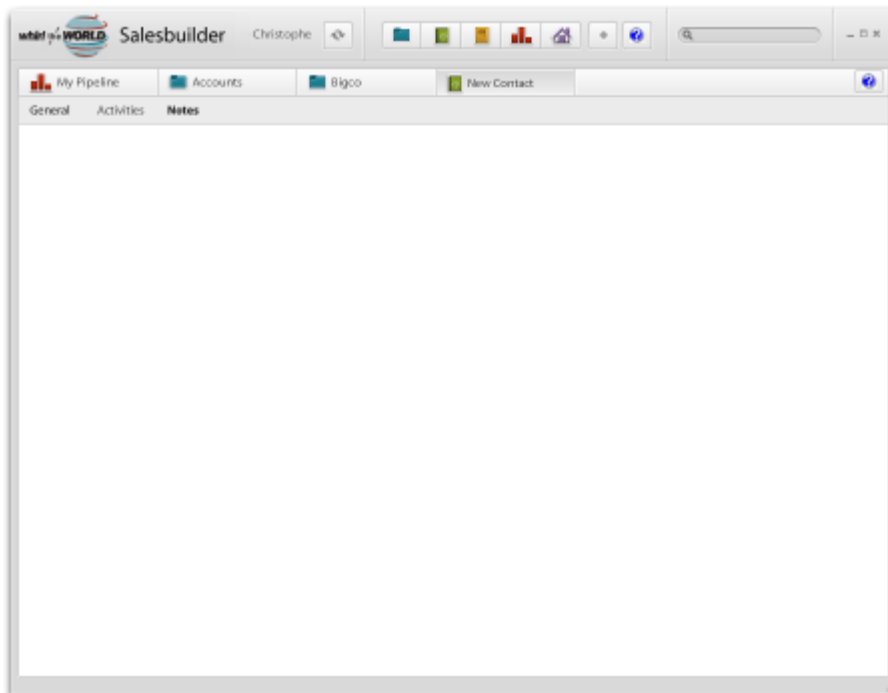

The New Contact - Notes screen is viewed by editing an Account, clicking the Contacts tab and clicking the New Contact button in the lower right corner of the dialog. Then the Notes tab is clicked.

About Font Awesome in RoboHelp

Font Awesome (FA) allows you to use Scalable Vector Graphics (SVGs) in your Web pages that can instantly be customised using the power of CSS. This is really useful for adding responsive icons or spot illustrations that will look good at any resolution, across all devices.

The easiest way to implement FA icons is by copying the FA icon's embed code into your HTML and then controlling the style of the icon by targeting it with some CSS.

Implementing SVG icons with Font Awesome

Each Font Awesome (FA) icon has a unique embed code that you can copy direct from the FA website. This can be referenced in your pages by placing it inside a HTML element such as <i> or a . The style of the icon can then be customised by applying your own styles. For example, you may want to change the colour or size of the icon.

To insert a FA icon:

1. Go to https://fontawesome.com/start.

2. Enter your email to create a Font Awesome kit and hit **Send Kit Code**. You'll receive an email, from which you'll need to verify your email address and then create a Font Awesome account.

3. Copy the Kit Code into the **<head>** of your topic (or master page).

4. Next, go to https://fontawesome.com/icons?d=gallery&s=solid&m=free and find the desired icon.

5. Copy the desired icon's code and add it into your topic using a HTML element, like **<i>** or ****. For example:
   - <i class="fas fa-question-circle"></i> **OR**
   -

6. In your style sheet, create a class to style the SVG icon. For example, like **.fa-icon** below.

```
.fa-icon {
 font-size: 128px;
 color: firebrick
 }
```

7. Apply the style to the HTML element like this: . See the example below:

About Typekit

Adobe Fonts (also known as Typekit) is an online service which offers a subscription library of high-quality fonts, as well as a number of cool free fonts too. The fonts may be used directly on your Web pages and synchronised so that the font is always available. It's easy to set up and frees your readers from the need to have the font installed locally on their PCs. So if you're tired of using standard Windows fonts such as Arial or Verdana in your RoboHelp projects, try implementing Adobe Fonts to shake things up a bit.

Implementing Web fonts with Typekit

Web fonts such as those provided by Adobe Fonts can be used in RoboHelp projects. Simply find your favourite font from the Adobe Fonts library, copy the unique URL, and then apply the font in your stylesheet.

To use a web font:

1. Go to **Adobe Fonts**, and search for the desired font, e.g. Gilbert.

2. At the right-hand side of the fonts you want to use, click **Activate font**.

3. Click **Add to Web Project** and in the dialog that appears create a name for the new project and click **Create**.

4. A unique URL will be created for you to place into your HTML. This can be done by either pasting the default embed code into the <head> of each topic (or the master page if you are using one) or by pasting the @import link into your CSS.
   - **Default embed code**: <link rel="stylesheet" href="https://use.typekit.net/pgf6joz.css"> **OR**
   - **Import link**: @import url("https://use.typekit.net/pgf6joz.css");

5. Next, in your CSS add the desired **font-family**, **font-weight**, and **font-style**.

```
p.gilbert {
font-family: gilbert-color, sans-serif;
font-weight: 700;
font-style: normal;
}
```

This font is called Gilbert and it's being powered by Typekit.

Index

Glossary

CRM

Customer relationship management (CRM) is a widely-implemented strategy for managing a company's interactions with customers, clients and sales prospects. It involves using technology to organize, automate, and synchronize business processes —principally sales activities, but also those for marketing, customer service, and technical support. The overall goals are to find, attract, and win new clients, nurture and retain those the company already has, entice former clients back into the fold, and reduce the costs of marketing and client service. Customer relationship management describes a company-wide business strategy including customer-interface departments as well as other departments.

CSH

(Context-sensitive Help)

Opportunity

Any contact with a customer (or potential customer) is generically known as an opportunity. This is because you have an opportunity to convert a potential customer to an actual customer. Or an opportunity to deepen and strengthen the existing customer experience.

PDF

(Adobe System's Portable Document Format)

Pipeline

A Pipeline is defined as a sales process. This is also known as a sales tunnel or a sales funnel and is a systematic approach to selling a product or service.

Project Bubble

In the My Pipeline view each project is represented as a circular bubble. These are called Project Bubbles. They may be clicked and dragged to change their data on the My Pipeline screen.

SFA

A Sales Force Automation System (SFA), typically a part of a company's customer relationship management system, is a system that automatically records all the stages in a sales process. SFA includes a contact management system which tracks all contact that has been made with a given customer, the purpose of the contact, and any follow up that might be required. This ensures that sales efforts are not duplicated, reducing the risk of irritating customers. SFA also includes a sales lead

tracking system, which lists potential customers through paid phone lists, or customers of related products. Other elements of an SFA system can include sales forecasting, order management and product knowledge. More developed SFA systems have features where customers can actually model the product to meet their required needs through online product building systems. This is becoming more and more popular in the automobile industry, where patrons can customize various features such as color and interior features such as leather vs. upholstered seats.

SSL

(Single Source Layout)

UDV

User Defined Variable

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