

## CLIENT FILE - CUE CARD

|                                |                                               |
|--------------------------------|-----------------------------------------------|
| <b>MAR</b>                     | Master Account Record                         |
| <b>BAR</b>                     | Business Account Record                       |
| <b>PAR</b>                     | Passenger Account Record<br>(Attached to BAR) |
| <b>Initialize Customer BAR</b> |                                               |
| <b>CFB/ACTEW</b>               | Create Customer Data BAR                      |
| <b>Initialize Customer PAR</b> |                                               |
| <b>CFP/ACTEW-BROWN</b>         | Create Customer Data PAR                      |

### Build Customer BAR/PAR Procedure

|                                                                                                     |                                                                                         |
|-----------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Transfer Codes                                                                                      | Y - Yes always move<br>O - Optional move<br>N - Never move (information only)           |
| <b>3 Steps to create a Client File</b>                                                              |                                                                                         |
| 1 Create BAR<br>Create PAR                                                                          | <b>CFB/BAR TITLE</b><br><b>CFB/BAR TITLE-PAR TITLE</b>                                  |
| Note: Standardize the BAR/PAR format for easy retrieval. Example <b>CFB/COMPANY NAME-SURNAME</b>    |                                                                                         |
| 2 Build Lines                                                                                       | <b>1N/Company Name</b><br><b>2Y/P.HKGB*2390 1298</b><br><b>4O/Delivery Address (D.)</b> |
| Note: Line numbers in all BARs/PARs should be used for the same Information. Example <b>1Y/NAME</b> |                                                                                         |
| 3 Client file end creation                                                                          | <b>CE</b>                                                                               |

### Display Client File

|                                    |                            |
|------------------------------------|----------------------------|
| MAR                                | <b>C*</b>                  |
| BAR                                | <b>C*ACTEW</b>             |
| PAR                                | <b>C*ACTEW-BROWN</b>       |
| Display another branch BAR/PAR     | <b>C*GV5/WESTPAC-SMITH</b> |
| Redisplay last retrieved BAR/PAR   | <b>C*R</b>                 |
| Display line selection within BAR  | <b>C*ACTEW:10-15</b>       |
| Display Yes lines in PAR (Or N, O) | <b>C*ACTEW-BROWN:Y</b>     |

### Client File Update

|                              |                              |
|------------------------------|------------------------------|
| Change line information      | <b>C@4Y/P.HKGB*2390 1288</b> |
| Delete line                  | <b>C@23</b>                  |
| Change line type from Y to O | <b>C@23O/</b>                |

### Rename Client File

|                               |                         |
|-------------------------------|-------------------------|
| Rename BAR                    | <b>CRB/ACTEW:ACTEWS</b> |
| Rename PAR (After displaying) | <b>CRP/BROWN:BROWNE</b> |

### List Client Files

|                                          |                 |
|------------------------------------------|-----------------|
| Display list of BARs (First 500)         | CLB             |
| Display list of PARs Associated with BAR | CLP/ACTEW       |
| Display other branch BAR                 | CLB/GV5/WESTPAC |
| Display list of PARs starting with BAF   | CLP/ACTEW-BAF   |

### Delete Client Files

|                                    |                 |
|------------------------------------|-----------------|
| Delete BAR and ALL associated PARs | CXB/ACTEW       |
| Delete PAR                         | CXP/ACTEW-BROWN |
| Delete other branch BAR            | CXB/GV5/WESTPAC |

### Print Client File

|                                           |                 |
|-------------------------------------------|-----------------|
| Print BAR                                 | P-C*ACTEW       |
| Print PAR                                 | P-C*ACTEW-BROWN |
| Print currently or last displayed BAR/PAR | P-C*R           |
| Print list of BARs                        | P-CLB           |
| Print list of PARs associated with BAR    | P-CLP/ACTEW     |

### Move Client File

|                                             |                             |
|---------------------------------------------|-----------------------------|
| DISPLAYED                                   |                             |
| Move all Y lines of client file             | CM/                         |
| Move all Y lines and add consultant name    | CM/*ANDREW                  |
| Move all Y lines plus option lines 7,16     | CM/7.16                     |
| BLIND MOVE                                  |                             |
| Move all Y lines from branch MAR            | CMT/GV5                     |
| Move all Y lines from BAR                   | CMT/ACTEW                   |
| Move all Y lines from PAR                   | CMT/ACTEW-BROWN             |
| Move Y and O lines 7,16 and consultant name | CMT/ACTEW-BROWN:*PETER:7.16 |
| Move only PAR Y lines (No BAR Lines)        | CMPT/ACTEW-BROWN            |
| Move another branch BAR/PAR                 | CMT/GV5/WESTPAC-SMITH       |