




Unleashing the Power with the Profile Manager

At the heart of *ClientBase Online* is the Profile Manager. From this window, view, sort and manage all the client, agent, or vendor information, or manage relationships with prospective clients and vendors. This is where many agents spend most of their time - accessing and updating data. In the past, a potential customer has called your agency, but never made it into the "system" because they did not book a trip. With *ClientBase Online*, turn prospects into lifelong customers by tracking these potential clients, taking ownership of them and including those in future marketing programs.

Example: Patrick Young calls to plan a surprise getaway with his wife, Mary, for their upcoming anniversary. After locating his profile, you notice the Travel History indicator notifying you that Patrick has booked travel with the agency in the past. You quickly check their past travel history, and then glance at their marketing preferences and with this information you are able to suggest just the right travel package. He appreciates your knowledge of their needs, which is why he books through you again and again. Oh, and while you are in their profile, you quickly capture the date of their anniversary in the *Special Dates* table, so next year you can initiate the idea of a romantic getaway.

Leisure - Young/Patrick

Travel History indicator

Patrick Young 2498 Poe Road Seattle, WA 43402	Cell: +1 (419) 787-2876 E-mail: pyoung@gmail.com Cell: +1 (213) 467-7154 E-mail: maryellen@hotmail.com	Marketing Codes: 23 Primary Traveler: Young/Patrick Ric... Groups: RCCOASIS16	Primary Agent: Beth Vollmar Created: 3/18/13 Salutation: Pat Interface ID: 2137321832 Profile No.: 17392769	  
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Remarks: Top 50 Client; Nickname: 'Pat', Related to Vicki Allison

About Young/Patrick

- General Info
- Communications
- Remarks
- Marketing Codes
- Travelers
- Activities
- Credit Cards
- Loyalty Programs
- Res Cards
- Travel History
- Groups
- Attachments
- PNR Entries
- More Fields

General Info EDIT

Profile Type: Leisure
 Profile Name: Young/Patrick
 Name: Patrick Young
 Additional Name:

Address + ADD

2498 Poe Road
 Seattle, WA 43402
 Address Type: Primary, Bill To, Ship To Edit

Additional Info EDIT

Interface ID: 2137321832
 Branch: 0 - Jet Set Travel
 Primary Agent: Beth Vollmar
 Membership ID:

Web ID:
 Web Password:
 Referred By: Signage
 Salutation: Pat

Special Dates + ADD

Date: 9/1/2010
 Type:

Profile Status

Profile Status: Active
 Create User: MINIV

Marketing Codes SAVE CANCEL

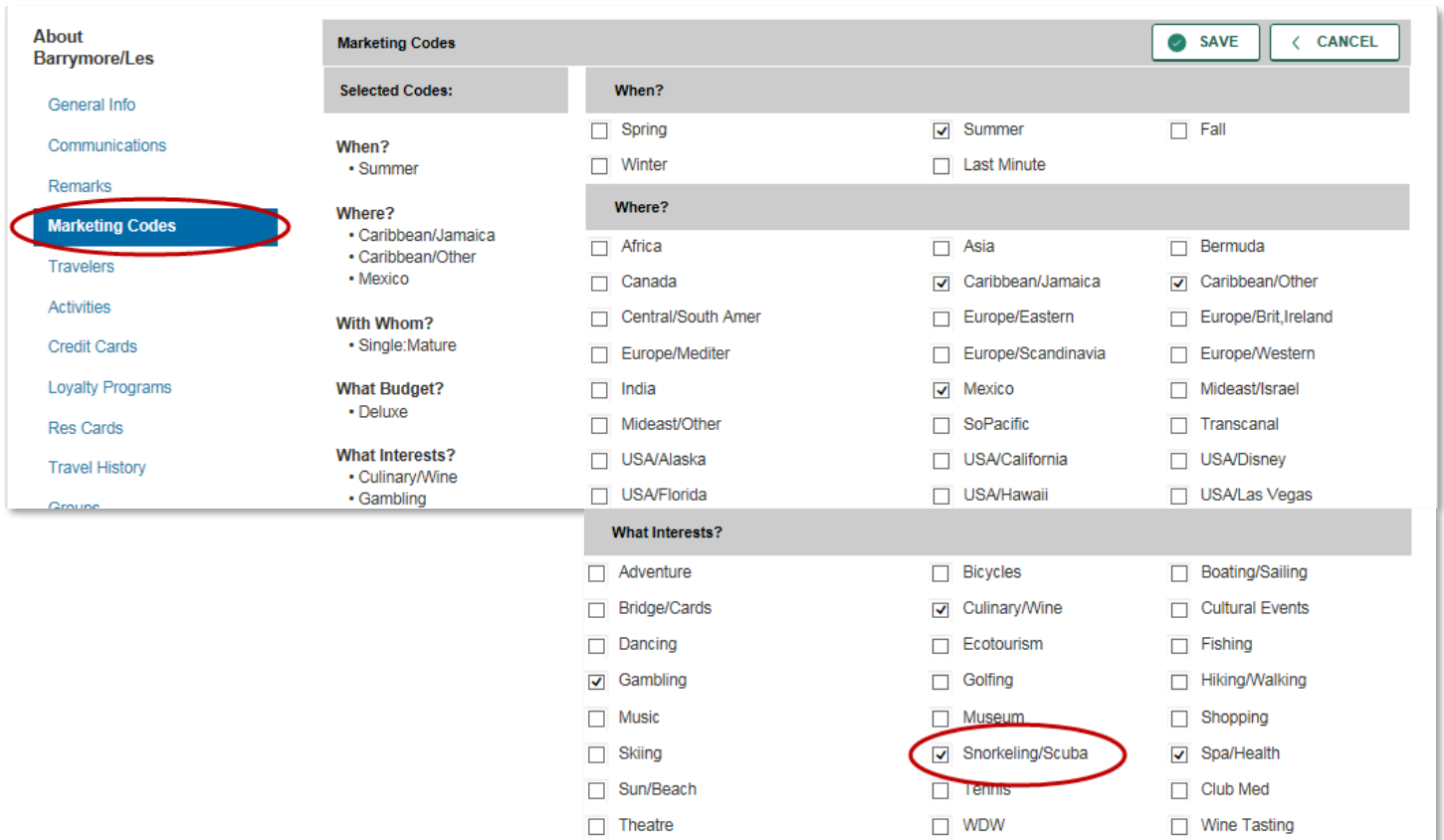
Selected Codes:	When?
	<input type="checkbox"/> Spring <input checked="" type="checkbox"/> Summer <input type="checkbox"/> Fall <input type="checkbox"/> Winter <input type="checkbox"/> Last Minute
	Where?
<input checked="" type="checkbox"/> Africa <input type="checkbox"/> Mexico <input type="checkbox"/> USA/Disney	<input type="checkbox"/> Asia <input type="checkbox"/> Bermuda <input type="checkbox"/> Caribbean/Jamaica <input type="checkbox"/> Caribbean/Other <input type="checkbox"/> Central/South Amer <input type="checkbox"/> Europe/Eastern <input type="checkbox"/> Europe/Brit Ireland

Streamline Marketing with Marketing Codes

The Marketing Tables in *ClientBase Online* help you identify each of your customer's unique travel preferences, interests and demographics, while at the same time automatically grouping your clients with common codes. Since qualifying a customer for a leisure vacation can be the toughest part of selling leisure travel, access to this valuable information might just make the difference between closing a sale or losing it. These Marketing Codes make it possible to consistently offer the right product in front of the right client by both front-line agents and any marketing programs geared towards generating travel interest.

In addition, labels, letters, and e-mails are quickly created to link clients and travel preferences when a "hot" travel special lands on your desk. A master set of marketing tables appears in every client's profile under the *Marketing Codes* link. Eight of these tables come with pre-defined default codes, but all of them can be customized to meet your agency needs. With a simple point-and-click with the mouse, every agent selects from the same list, and that means client consistency and agent simplicity.

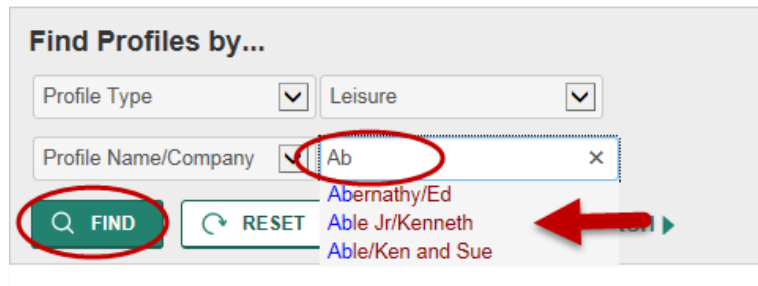
Example: Les Barrymore calls in and requests some information on a trip to the Cayman Islands. He read about the great destination in his favorite *Scuba Weekly* magazine and figures it would be a great place for a honeymoon (may as well squeeze in some diving). By clicking on the Marketing Link in Les' profile, the agent easily places a checkmark in the box next to *Scuba/Snorkel* under the *What Interests?* Table. Now, when your agency has a scuba or snorkeling-related trip to promote, rest assured that Leg will be included among the other qualified clients you are tempting with the great deal!



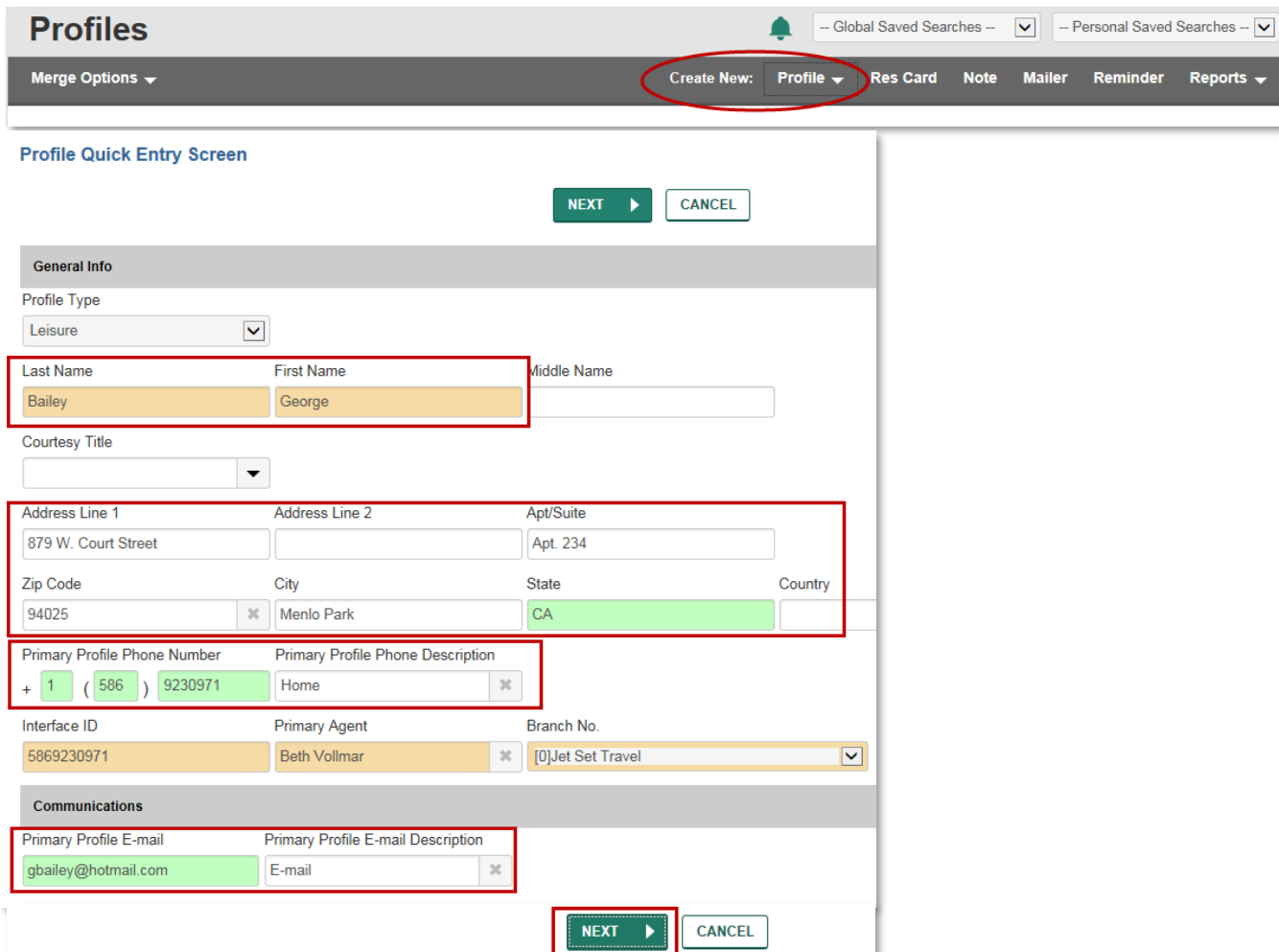
Marketing Codes		SAVE		CANCEL	
Selected Codes:		When?			
When?		<input type="checkbox"/> Spring	<input checked="" type="checkbox"/> Summer	<input type="checkbox"/> Fall	
• Summer		<input type="checkbox"/> Winter	<input type="checkbox"/> Last Minute		
Where?		Where?			
• Caribbean/Jamaica		<input type="checkbox"/> Africa	<input type="checkbox"/> Asia	<input type="checkbox"/> Bermuda	
• Caribbean/Other		<input type="checkbox"/> Canada	<input checked="" type="checkbox"/> Caribbean/Jamaica	<input checked="" type="checkbox"/> Caribbean/Other	
• Mexico		<input type="checkbox"/> Central/South Amer	<input type="checkbox"/> Europe/Eastern	<input type="checkbox"/> Europe/Brit,Ireland	
With Whom?		<input type="checkbox"/> Europe/Mediter	<input type="checkbox"/> Europe/Scandinavia	<input type="checkbox"/> Europe/Western	
• Single:Mature		<input type="checkbox"/> India	<input checked="" type="checkbox"/> Mexico	<input type="checkbox"/> Mideast/Israel	
What Budget?		<input type="checkbox"/> Mideast/Other	<input type="checkbox"/> SoPacific	<input type="checkbox"/> Transcanal	
• Deluxe		<input type="checkbox"/> USA/Alaska	<input type="checkbox"/> USA/California	<input type="checkbox"/> USA/Disney	
What Interests?		<input type="checkbox"/> USA/Florida	<input type="checkbox"/> USA/Hawaii	<input type="checkbox"/> USA/Las Vegas	
• Culinary/Wine		What Interests?			
• Gambling		<input type="checkbox"/> Adventure	<input type="checkbox"/> Bicycles	<input type="checkbox"/> Boating/Sailing	
		<input type="checkbox"/> Bridge/Cards	<input checked="" type="checkbox"/> Culinary/Wine	<input type="checkbox"/> Cultural Events	
		<input type="checkbox"/> Dancing	<input type="checkbox"/> Ecotourism	<input type="checkbox"/> Fishing	
		<input checked="" type="checkbox"/> Gambling	<input type="checkbox"/> Golfing	<input type="checkbox"/> Hiking/Walking	
		<input type="checkbox"/> Music	<input type="checkbox"/> Museum	<input type="checkbox"/> Shopping	
		<input type="checkbox"/> Skiing	<input checked="" type="checkbox"/> Snorkeling/Scuba	<input checked="" type="checkbox"/> Spa/Health	
		<input type="checkbox"/> Sun/Beach	<input type="checkbox"/> Tennis	<input type="checkbox"/> Club Med	
		<input type="checkbox"/> Theatre	<input type="checkbox"/> WDW	<input type="checkbox"/> Wine Tasting	

Steps for successfully using Profiles

1. With every customer contact, search for profile by name by entering the first few letters of the last name in Profile Name field.



2. If listed, click on the name, click *find*, click *view* and verify profile data in header. Click **General Info** to update any information. Next add any travelers for this profile by clicking **Travelers**, clicking **Add** and add first name, last name, middle name, birthday, citizenship, passport, credit card, and frequent flyer numbers.
3. If **NOT FOUND**, click on Create New: Profile on the menu bar and add either Leisure Profile or Corporate Profile. Minimum required is Name, address, phone number and email if you can get it. Click *Next*.



Profile Quick Entry Screen



Primary Traveler

Last Name: First Name: Middle Name: Courtesy Title:

Primary Phone Number: + () Primary Phone Description:

Primary E-mail: Primary E-mail Description:

Gender: Citizenship:

Birth Date:

Steps for successfully using Marketing Codes:

1. With every customer contact, search for profile and update customer information or create a new profile.
2. As you are talking with the client, if there is anything checked off in the marketing table, use this information to qualify the customer.
3. If a client books or inquires about a particular trip, click the marketing code that reflects this interest for future marketing.
4. If a client is waiting for you while you check availability, print out a client survey and ask for an update of his/her travel preferences. That's a great way to quickly add new Marketing Codes to your database.

ClientBase Online DASHBOARD PROFILES ACTIVITIES RES CARDS

Profiles Global Saved Searches Personal Saved Searches

Merge Options Create New: Profile Res Card Note Mailer Reminder Reports

Leisure Clients

Find Profiles by...
 Profile Type: Profile Name/Company:
 [GO TO ADVANCED SEARCH](#)

✓ COUNT First | Previous | Next | Select Columns | Sort by Columns | Save

Profile Type	Name	Interface ID	City	State	Zip Code	Communication Entry	Primary

Reports dropdown menu:
 Profile
 Client Survey
 Statistics
 Marketing Code Statistics
 Referred By Statistics
 Geographic Statistics
 Birthday Statistics
 Special Date Statistics
 Completed Field Statistics
 User Statistics