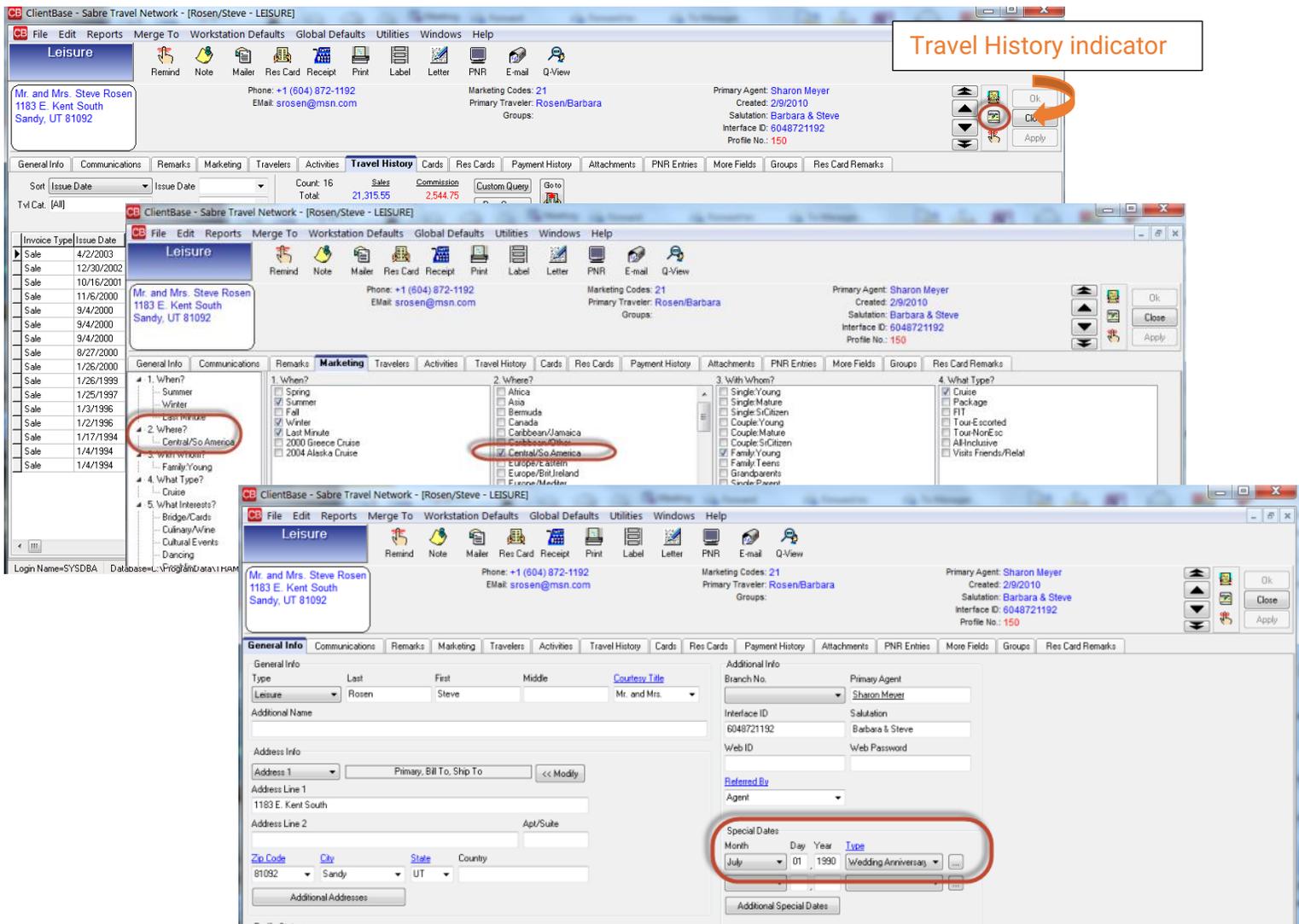


# Unleashing the Power with the Profile Manager

At the heart of *ClientBase Windows* 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 Windows*, turn prospects into lifelong customers by tracking these potential clients, taking ownership of them and including those in future marketing programs.

**Example:** Steve Rosen calls to plan a surprise getaway with his wife, Barbara, for their upcoming anniversary. After locating his profile, you notice the Travel History indicator notifying you that Steve 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.



The screenshot displays the ClientBase Windows Profile Manager interface for a client named Mr. and Mrs. Steve Rosen. The interface is divided into several sections:

- Client Information:** Located at the top, it includes the client's name, address (1183 E. Kent South, Sandy, UT 81092), phone number (+1 (604) 872-1192), email (srosen@msn.com), and marketing codes (21). It also identifies the primary agent as Sharon Meyer and the primary traveler as Rosen/Barbara.
- Travel History Indicator:** A red box highlights the "Travel History" indicator in the top right corner of the window.
- Travel History Table:** A table showing a list of travel history entries with columns for Invoice Type, Issue Date, and Total. The total sales are 21,315.55 and the total commission is 2,544.75.
- Marketing Preferences:** A section titled "Marketing" with various options for when, where, and with whom to market. "Central/So America" is selected under "Where?".
- Special Dates:** A section at the bottom right where the client's wedding anniversary is recorded as July 01, 1990.

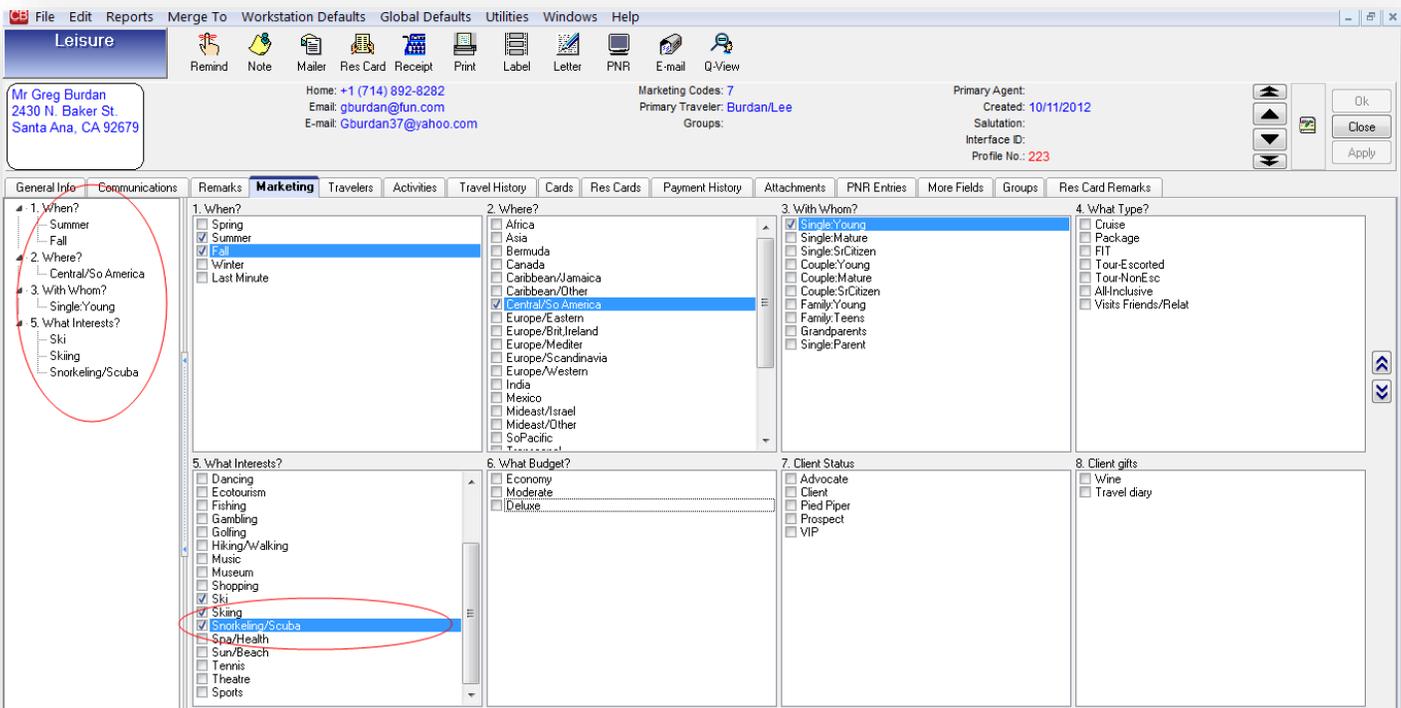
## Streamline Marketing with Point-and-Click Codes

The Marketing Tables in *ClientBase Windows* helps 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* tab. 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:** Greg Burdan 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 Tab in Greg's 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 Greg will be included among the other qualified clients you are tempting with the great deal!



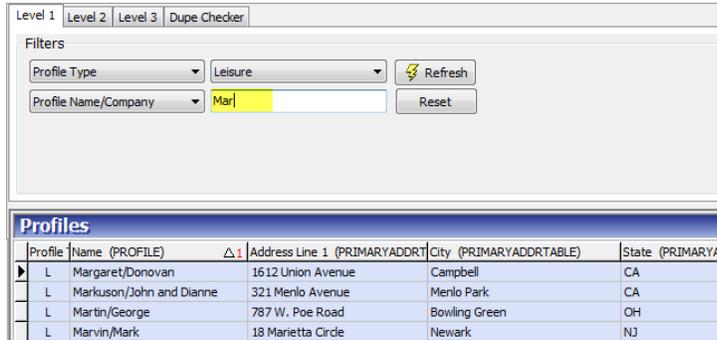
The screenshot displays the ClientBase Windows interface for a client named Mr. Greg Burdan. The 'Marketing' tab is active, showing eight tables for configuring marketing preferences:

- 1. When?** Includes options for Summer, Fall, Winter, and Last Minute. 'Fall' is selected.
- 2. Where?** Lists various regions like Africa, Asia, Bermuda, Canada, etc. 'Central/So America' is selected.
- 3. With Whom?** Lists relationship types like Single:Young, Couple:Young, etc. 'Single:Young' is selected.
- 4. What Type?** Lists travel types like Cruise, Package, FIT, etc. 'All-Inclusive' is selected.
- 5. What Interests?** Lists activities like Dancing, Fishing, Golfing, etc. 'Snorkeling/Scuba' is selected and circled in red.
- 6. What Budget?** Includes Economy, Moderate, and Deluxe.
- 7. Client Status:** Includes Advocate, Client, Pled Piper, Prospect, and VIP.
- 8. Client gifts:** Includes Wine and Travel diary.

The interface also shows client contact information, primary agent details, and various utility icons at the top.

# Steps for successfully using Profiles

1. **With every customer contact, query (search) for profile** by last name. Enter the first few letters of the client's last name next to the Profile Name/Company field.  
Note: If your filters do not default to Profile Name/Company, you can select that option in the drop-down box.



Level 1 | Level 2 | Level 3 | Dupe Checker

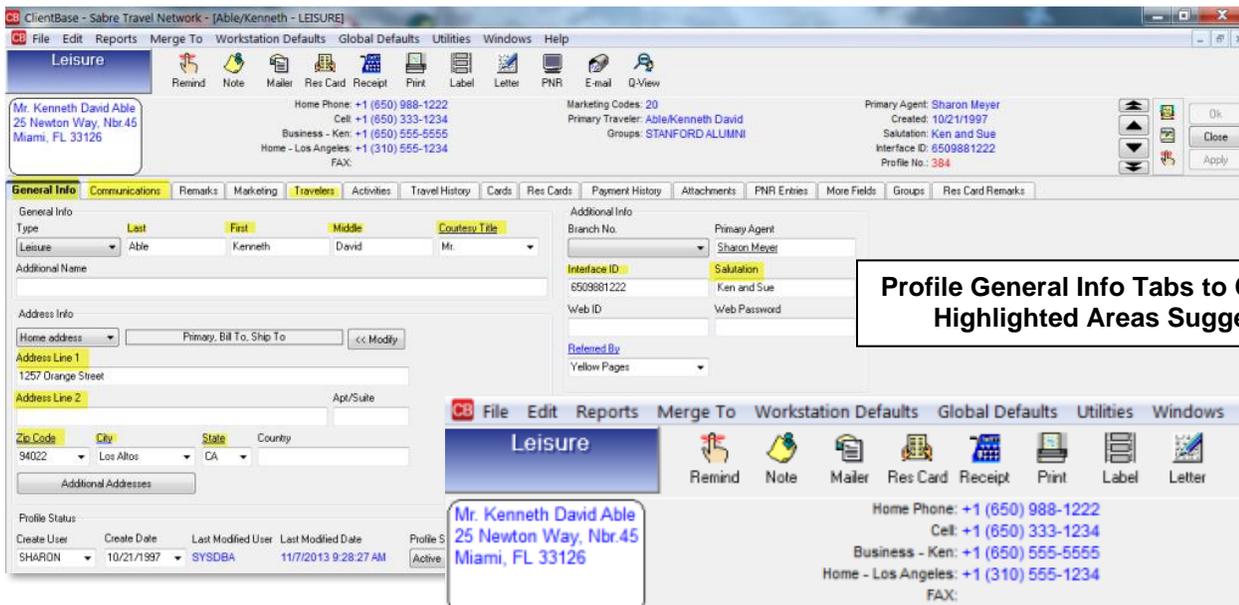
Filters

Profile Type: Leisure Refresh

Profile Name/Company: Mar Reset

Profile	Name (PROFILE)	Address Line 1 (PRIMARYADDRESS)	City (PRIMARYADDRESS)	State (PRIMARYADDRESS)
L	Margaret/Donovan	1612 Union Avenue	Campbell	CA
L	Markuson/John and Dianne	321 Menlo Avenue	Menlo Park	CA
L	Martin/George	787 W. Poe Road	Bowling Green	OH
L	Marvin/Mark	18 Marietta Circle	Newark	NJ

2. If **FOUND**, double click on the profile to open and verify profile data in header. Click *General Info* tab to update any information. Next, add any travelers for this profile in *Traveler Tab* by clicking *Add* and add first name, last name, middle name, birthday, citizenship, passport, credit card, and frequent flyer numbers.



ClientBase - Sabre Travel Network - [Able/Kenneth - LEISURE]

Leisure

Mr. Kenneth David Able  
25 Newton Way, Nbr.45  
Miami, FL 33126

Home Phone: +1 (650) 988-1222  
Cell: +1 (650) 333-1234  
Business - Ken: +1 (650) 555-5555  
Home - Los Angeles: +1 (310) 555-1234  
FAX:

Marketing Codes: 20  
Primary Traveler: Able/Kenneth David  
Groups: STANFORD ALUMNI

Primary Agent: Sharon Meyer  
Created: 10/21/1997  
Salutation: Ken and Sue  
Interface ID: 6509881222  
Profile No.: 384

General Info | Communications | Remarks | Marketing | Travelers | Activities | Travel History | Cards | Res Cards | Payment History | Attachments | PNR Entries | More Fields | Groups | Res Card Remarks

Additional Info

Branch No. Primary Agent: Sharon Meyer

Interface ID: 6509881222 Salutation: Ken and Sue

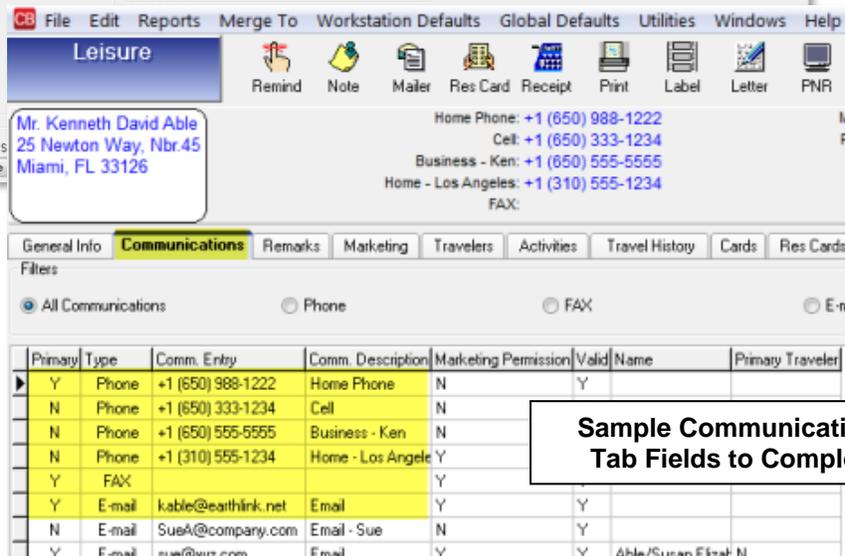
Web ID Web Password

Released By: Yellow Pages

Profile Status

Create User	Create Date	Last Modified User	Last Modified Date	Profile S
SHARON	10/21/1997	SYSDBA	11/7/2013 9:28:27 AM	Active

Profile General Info Tabs to Complete Highlighted Areas Suggested



ClientBase - Sabre Travel Network - [Able/Kenneth - LEISURE]

Leisure

Mr. Kenneth David Able  
25 Newton Way, Nbr.45  
Miami, FL 33126

Home Phone: +1 (650) 988-1222  
Cell: +1 (650) 333-1234  
Business - Ken: +1 (650) 555-5555  
Home - Los Angeles: +1 (310) 555-1234  
FAX:

General Info | **Communications** | Remarks | Marketing | Travelers | Activities | Travel History | Cards | Res Cards

Filters

All Communications Phone FAX E-m

Primary	Type	Comm. Entry	Comm. Description	Marketing Permission	Valid	Name	Primary Traveler
Y	Phone	+1 (650) 988-1222	Home Phone	N	Y		
N	Phone	+1 (650) 333-1234	Cell	N			
N	Phone	+1 (650) 555-5555	Business - Ken	N			
N	Phone	+1 (310) 555-1234	Home - Los Angeles	Y			
Y	FAX			Y			
Y	E-mail	kable@earthlink.net	Email	Y	Y		
N	E-mail	SueA@company.com	Email - Sue	N	Y		
Y	E-mail	sue@xuz.com	Email	Y	Y	Able/Susan Elizet	N

Sample Communications Tab Fields to Complete

**Leisure**

Remind Note Mailer Res Card Receipt Print Label Letter PNR E-mail Q-View

Ken Able  
25 Newton Way, Nbr.45  
Bowling Green, OH 43402  
US

E-mail: candoable@gmail.com  
Web Site: www.ableenterprises.com  
Home Phone: +1 (408) 766-2301  
Cell: +1 (408) 766-9856  
E-mail: kable@gmail.com

Marketing Codes: 24  
Primary Traveler: Able/Kenneth David  
Groups: RCCOASIS17  
Voucher Balance: 500.00

Primary Agent: Beth Vollmar  
Created: 10/21/1997  
Salutation: Ken and Sue  
Interface ID: 6509881222  
Profile No.: 384

Res Card Remarks

General Info	Communications	Remarks	Marketing	Travelers	Activities	Travel History	Cards	Res Cards	Payment History	Attachments	PNR Entries	More Fields	Groups	
Name	Age	Relationship	Primary	Last Name	Primary Phone Number	Primary E-mail Address	Passport Number					Add	Modify	Unlink
Able/Kenneth David	51	Primary	Y	Able	+1 (408) 766-2301	kable@gmail.com	456899993							
Martin/Susan Elizabeth	58	Wife	N	Martin		sue@xyz.com	454333333							
Able/Abigail Susan	16	Daughter	N	Able			876467387							
Able/Jon Michael	21	Son	N	Able			562565235							

Remarks  
Likes red wine  
Allergic to peanuts  
Mom is Vicky Allison

Web Site: www.ableenterprises.com  
Home Phone: +1 (408) 766-2301  
Cell: +1 (408) 766-9856  
E-mail: kable@gmail.com

Salutation/Nickname:  
Relationship to Profile: Primary  
Age: 51  
Primary Traveler: Yes

General Communications Address Advanced Traveler Info Cards Travel Preferences PNR Entries Associated Profiles

Relationship to Profile: Primary  
Courtesy Title: Mr.  
First Name: Kenneth  
Middle Name: David  
Last Name: Able  
Gender: Male

Citizenship: US  
Birthdate: January 23, 1967  
Age: 51  
Salutation/Nickname: [Red Arrow pointing to field]  
Associate ID: [Empty field]

Primary Traveler

Remarks  
Likes red wine  
Allergic to peanuts  
Mom is Vicky Allison

Enter Full Legal Name

**Sample Traveler Tabs to Complete**

Web Site: www.ableenterprises.com  
Home Phone: +1 (408) 766-2301  
Cell: +1 (408) 766-9856  
E-mail: kable@gmail.com

Salutation/Nickname:  
Relationship to Profile: Primary  
Age: 51  
Primary Traveler: Yes

Associated Profiles: ABC Manufacturing Able/Ken

General Communications Address Advanced Traveler Info Cards Travel Preferences PNR Entries Associated Profiles

Filters  
 All Cards  
 Credit Card  
 Frequent Flyer  
 Hotel Program  
 Car Program  
 Cruise Program  
 Other  
 Discount Card

Name on Card	Expiration	Issued By	Card Type	Card Description	Approx. Miles	Card Limit	Merge To PNR	Add
Kenneth Able	12/31/2018		Credit Card	Business			Use Global PN...	Modify
Kenneth Able			Frequent Flyer	Advantage			Use Global PN...	Delete
			Frequent Flyer	JK			Use Global PN...	
			Car Program	Hertz			Use Global PN...	
			Hotel Program	Hilton Hotels			Use Global PN...	

Web Site: www.ableenterprises.com  
Home Phone: +1 (408) 766-2301  
Cell: +1 (408) 766-9856  
E-mail: kable@gmail.com

Salutation/Nickname:  
Relationship to Profile: Primary  
Age: 51  
Primary Traveler: Yes

Associated Profiles: ABC Manufacturing Able/Ken

General Communications Address Advanced Traveler Info Cards Travel Preferences PNR Entries Associated Profiles

**Travel Preferences**

**Air**  
 Delta Air Lines  
 United Airlines

**Car**  
 Dollar Rent A Car  
 Hertz Rent A Car

**Cruise**  
 Princess Cruise Lines

**Hotel**  
 Hilton Hotels  
 Hyatt

**Tour**  
 General

**Air Preferences**

Class of Service  
 Unknown  
 No Preference  
 First Class  
 Business Class  
 Economy  
 Premium Economy

Seat Type  
 Unknown  
 No Preference  
 Aisle  
 Window

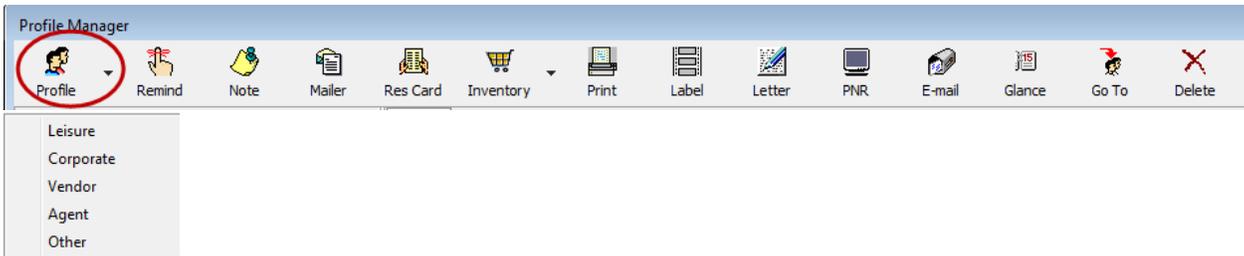
Meal Code: [Dropdown]  
Meal Type: Vegetarian

Aircraft Type: [Dropdown]

Special Options: [Dropdown]

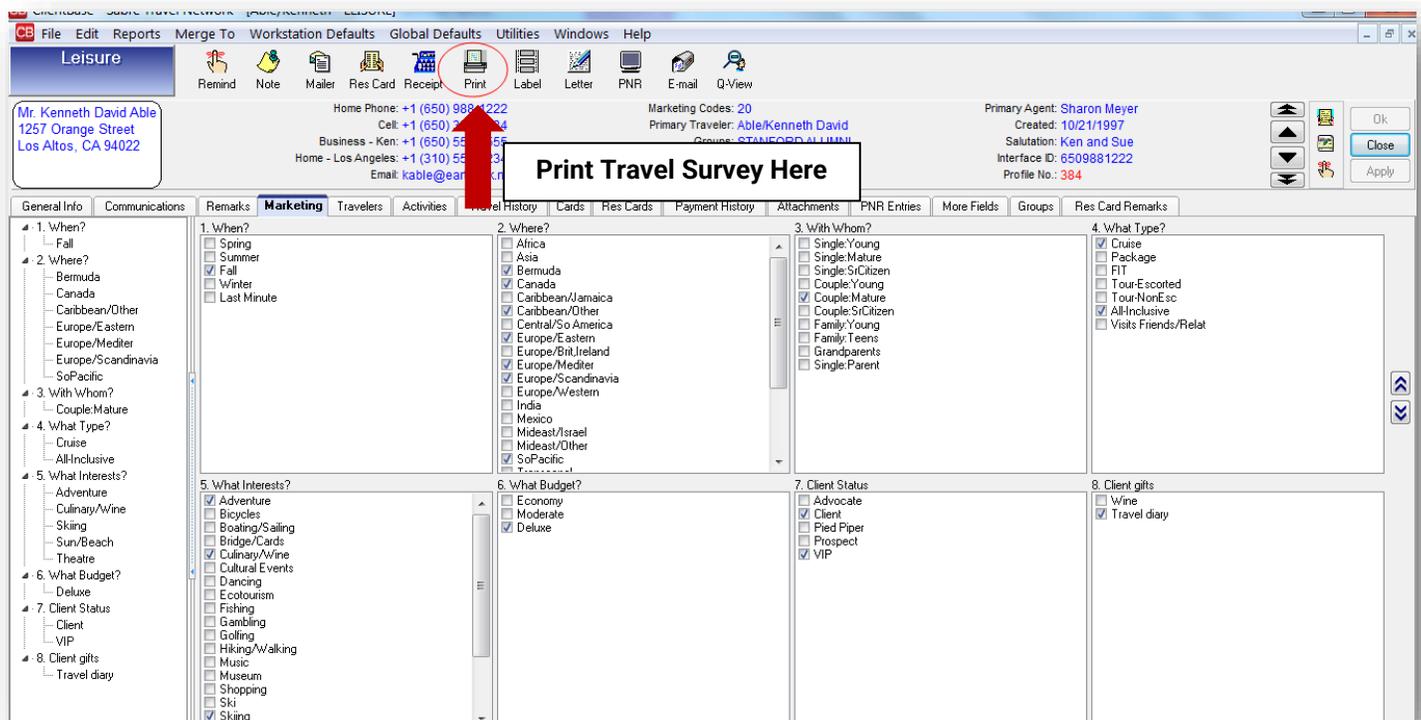
Add

3. If **NOT FOUND**, click on the Profile Icon in toolbar and add either Leisure Profile or Corporate Profile. Minimum required is Name, address, phone number...& e-mail if you can get it!



## Steps for successfully using Marketing Codes:

1. With every customer contact, query (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 inquiries 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 on availability, print out a client survey and ask for an update of his travel preferences. That is a great way to quickly add new Marketing Codes to your database.



Leisure

Mr. Kenneth David Able  
1257 Orange Street  
Los Altos, CA 94022

Home Phone: +1 (650) 988-1222  
Cell: +1 (650) 558-1234  
Business - Ken: +1 (650) 558-1234  
Home - Los Angeles: +1 (310) 558-1234  
Email: kable@earthlink.net

Marketing Codes: 20  
Primary Traveler: Able/Kenneth David  
Groups: STANFORD ALUMNI

Primary Agent: Sharon Meyer  
Created: 10/21/1997  
Salutation: Ken and Sue  
Interface ID: 6509881222  
Profile No.: 384

**Print Travel Survey Here**

1. When?	2. Where?	3. With Whom?	4. What Type?
<input type="checkbox"/> Spring <input type="checkbox"/> Summer <input checked="" type="checkbox"/> Fall <input type="checkbox"/> Winter <input type="checkbox"/> Last Minute	<input type="checkbox"/> Africa <input type="checkbox"/> Asia <input type="checkbox"/> Bermuda <input checked="" type="checkbox"/> Canada <input type="checkbox"/> Caribbean/Jamaica <input type="checkbox"/> Caribbean/Other <input type="checkbox"/> Central/So America <input checked="" type="checkbox"/> Europe/Eastern <input type="checkbox"/> Europe/Brit.Ireland <input checked="" type="checkbox"/> Europe/Mediter <input type="checkbox"/> Europe/Scandinavia <input type="checkbox"/> Europe/Western <input type="checkbox"/> India <input type="checkbox"/> Mexico <input type="checkbox"/> Mideast/Israel <input type="checkbox"/> Mideast/Other <input checked="" type="checkbox"/> SoPacific	<input type="checkbox"/> Single:Young <input type="checkbox"/> Single:Mature <input type="checkbox"/> Single:SrCitizen <input type="checkbox"/> Couple:Young <input checked="" type="checkbox"/> Couple:Mature <input type="checkbox"/> Couple:SrCitizen <input type="checkbox"/> Family:Young <input type="checkbox"/> Family:Teens <input type="checkbox"/> Grandparents <input type="checkbox"/> Single:Parent	<input checked="" type="checkbox"/> Cruise <input type="checkbox"/> Package <input type="checkbox"/> FIT <input type="checkbox"/> Tour-Escorted <input type="checkbox"/> Tour-NonEsc <input type="checkbox"/> All-Inclusive <input type="checkbox"/> Visits Friends/Relat
5. What Interests?	6. What Budget?	7. Client Status	8. Client gifts
<input checked="" type="checkbox"/> Adventure <input type="checkbox"/> Culinary/Wine <input type="checkbox"/> Boating/Sailing <input type="checkbox"/> Bridge/Cards <input type="checkbox"/> Culinary/Wine <input type="checkbox"/> Cultural Events <input type="checkbox"/> Dancing <input type="checkbox"/> Ecotourism <input type="checkbox"/> Fishing <input 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"/> Ski <input checked="" type="checkbox"/> Skiing	<input type="checkbox"/> Economy <input type="checkbox"/> Moderate <input checked="" type="checkbox"/> Deluxe	<input type="checkbox"/> Advocate <input type="checkbox"/> Client <input type="checkbox"/> Pied Piper <input type="checkbox"/> Prospect <input checked="" type="checkbox"/> VIP	<input type="checkbox"/> Wine <input checked="" type="checkbox"/> Travel diary