

# Table of Contents

Overview	1
Maintenance Queries	1
Profiles with missing emails:	1
Invalid emails (missing @ or . ):	2
Incomplete Address Information:	3
Profiles with no Marketing Codes:	4
Res Card / Reservation Queries	5
Profiles with no Res Cards:	5
Past Clients Who Have Not Purchased In The Last 2 Years:	5
Top XXX Clients Based on Past Purchases:	6
Clients Who Bought > \$10,000 in Travel Last Year:	6
Bookings This Week:	7
Past Cruisers:	7
Res Cards with No Insurance:	8
Marketing Queries	9
Promo Open, Sent and Clicked	9
Clients We Can Market To Via Email:	9
Clients With Complete Address Information:	10
Client With No Marketing In The Last 3 Weeks:	10
Profile Queries	11
New Customers Last 7 Days	11
Passports Expiring Within the Quarter	11
Saving Queries	12
Using Date Formulas in Queries	14

With all the available filters in Level 1, 2 and 3 queries, ClientBase Windows allows you to view your database inside out, upside down or in just about any subset you desire. Some people call this "mining your data". We call it "querying" your database. In the end the objective is to better understand your customer base and maximize your marketing and service efforts with your clients. So in our opinion, the more you query your database the more successful you will be.

To help you with those queries that you want to run often, we suggest you save the query filters after setting them up. This is called saving a query to a folder. One click on a saved query folder, and the query filters are completed automatically. What a time saver!

With this in mind, we thought you might be interested in seeing how other agencies have gotten creative with their saved gueries and have listed the most creative below.

Join one of our daily Q&A sessions for additional help with setting up, running and saving queries. Click here to see when our next Q&A is offered.

Look for **BEST PRACTICE** tips along the way!

### **Maintenance** Queries

#### **Profiles with missing emails:**



\*\*\* Profile Level 3 Filter Number 1

(Profile Type [Leisure])

AND (Profile Status Is Equal to Active)

AND (Communication Filter Type: Does Have Communication Records with the following criteria)

(Communication Type Is Equal to E-mail)

AND (Communication Entry Is BLANK)

BEST PRACTICE For clients that do not have an email address, create a Marketing Code called 'No Email'. When you create the query for missing email addresses, add another filter. Select the Marketing Codes tab and double click the 'No Email' code. This will exclude clients that do not have an email address.



Marketing: Promotions Is NOT Checked [No Email Address]

#### Invalid emails (missing @ or . ):

This query requires 2 filters.



Create the first filter and use 'Duplicate Filter' to create the second filter replacing the @ sign with a period ( . ).

#### **Incomplete Address Information:**

This query requires 4 filters.

Activities Res Cards Inventory Internal Leve	11 Level (Level 3) upe Checker Results
Dashboard Home Profiles Filt	
Profile Manager	Profile Query Level 3     Add Filter Re Modify Filter Sur
Profile Manager	Control C
Corporate Clients	Profile Type [Leisure] Profile No. to Count 1
	Profile Name
Other Profiles	Midde Name
All Passengers	Additional Name
Emails Clicked in the last 7 Days     Emails Clicked in the last 7 Days     Emails Clicked in the last 7 Days	Address Type Includes (Any)         P Imary Address         Bill To Address         Ship To Address         Alternate Address           Second Address         From Jan ** To DEC **
Bonus Names Ensemble Select	Address Line 1 Is BLANK
Ensemble Vacations/Vacation Therap Ensemble Lifestyles	Address Line 2 Apt/Suite
Personal     New Customers Last 7 Days	City Country V
Profiles Updated in Last 7 Days	State   Marketing Permission
- 🛄 Clients we Can Market to Via E-mail	ZDL00e

- Once you create the first filter above where the Address Line 1 'Is BLANK', Select Add Filter.
- Select Profile type as Leisure and City 'Is Blank'. Click OK.
- Create two more filters selecting State 'Is Blank' and then Zip Code 'Is Blank'.
- Your Summarize will look like the following:

#### Level 3 Query Summarize:

- \*\*\* Profile Level 3 Filter Number 1 \_\_\_\_\_\_
  (Profile Type [Leisure])
  AND (Address Line 1 Is BLANK)
  AND (Profile Status Is Equal to Active)

### BEST PRACTICE

For Level 3 queries, select the Summarize button to view the details of your query. For Level 2 queries, the details are displayed below the tab.



#### Profiles with no Marketing Codes:



Right Click on every Marketing Category in order to exclude it. By excluding all, the result will be profiles that do not have any marketing codes selected.

BEST PRACTICE Depending on the size of your database, you may want to run this Query at night.

### Profiles with no Res Cards:

Activities Res Cards Inventor Interner Dashboard Home Profiles	Level 1 Level 2 Level 3 Dupe Checker						
Profile Manager	Profile Query Level 3					Add Filter	Reset All
Profile Manager     Global     Global	Fields General Info Profile Type [Leisure] Profile Name	n Marketing Activities Traveler/Contact Cards Re	is Cards More Fields Travel Hist			Duplicate Filter Modify Filter Delete Filter	Summarize ダ Refresh
		TBO Marketing Fields			$\bigcirc$	·	
		General Info Communication	Marketing Activities	Traveler/Contact	Carde Res Cards	More Fields	Travel History
		Filter Type: Does NOT Have Res C	Card Records with the follow	ing criteria			Â
Level 3 Query		Res Cards					E
Summarize:		Create Date	*	ta	0		
*** Profile Level 3 Filt	ter Number 1						
(Profile Type [Leisur	el)						
AND (Profile Status)	Is Equal to Active)						
AND (FIOTHE Status	is Equal to Active						
AND (Res Cards Filte	er Type: Does NOT H	ave Any Res Card Record	ds)				

# **BEST PRACTICE** Run Queries by Primary Agent and create a Reminder for the Agent to follow-up.

#### Past Clients Who Have Not Purchased In The Last 2 Years:



#### **Top XXX Clients Based on Past Purchases:**

Profile Manager Profile Manager  Profile Manager  Profile Manager  Profile Manager  Profile Manager  Corporate  Corporate Corporate  Corporate  Corporate  Corporate  Corporate  Corporate Corporate  Corporate  Corporate Corporate Corporate	Activities Traveler/Contact Cards Res Cards M Communicat To Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro Poetro	re Fields Travel History ions Periode Description	Court III Courns
Level 2 Query Summarize: *** General Info Profile Type Is Equal to [Leisure] Profile Status Is Equal to Active	General Info Marketing Activities Booking Vendor Travel Categories Total Fare mmission Amount Agent Name Ticket Number Confirmation #	Traveler/Contact Cards Res Cards Client T To to Depart Dates From To	More Fields Travel History
*** Travel History Top X Client Sales (X=100)	Traveler Name All Travelers Invoice Invoice No. Invoice No. Invoice Status voice Total Fare ce Total Commission	Enter Invoice Dates to narrow it down!	otals Sales Tot

#### **Clients Who Bought > \$10,000 in Travel Last Year:**



\*\*\* Travel History

Client Totals:Total Sales Between 10,000.00 And 999,999.00 FOR ONLY (Invoice Issue Dates Between "=0,0,-1" [1/7/2015] And "=" [1/7/2016] )

#### **Bookings This Week:**



... Reservation Filters
 Booking Status Is Equal to Confirmed
 Date Reserved Between "=-7,0,0" [1/14/2016] And "=" [1/21/2016]

#### **Past Cruisers:**



#### **Res Cards with No Insurance:**

Activities Res Cards Inventor Internet Deshboard Home Profiles Profile Manager Coporels Coporels Acard	2 Level 3 Profile Query Level 3 Profile Guery Level 3 General Info Profile Type (Leisure) Profile Name	Add Filter Reset All Duplicate Filter Summarize Modify Filter Profile No. to Delete Filter Presh
Profile Query Level 3      TB0 Marketing Fields     General Info     Communication Marketing Acti      Filter Type: Does Have Res Card Records with the follo     Res Cards     Res Card	vities Traveler/Contact Carlos Res	Cards More Fields Travel History
Create Date	▼ to	CB Profile Query Level 3
Trip Start Date	▼ to	
Trip End Date	▼ to	BU Marketing Fields General Info Communication Marketing Activities Traveler/Contact Cards Bes Cards More Field Travel History
Agent Name	-	
Res Card Status [Active]		
Reservation Cycle	mber 1	Travel History Booking Vendor Travel Categories [Insurance]
(Profile Type [Leisure])		Commission Amount to
AND (Profile Status Is Equ	al to Active)	

AND (Res Cards Filter Type: Does NOT Have Any Res Card Records with the following criteria) (Service Provider Travel Category [Insurance])

AND (Travel History Type: Does NOT Have Any Travel History Records with the following criteria) (Booking Travel Category [Insurance])

## **Marketing Queries**

### Promo Open, Sent and Clicked

Profile Manager	D 🐌 🗙
Activities Res Cards Inventor Homest Level Level 2 level 3 Dupe Checker Deshboard Home Profiles Filters	
Profile Manager	iery Level 2
Profile Manager     General Inf     General Inf     General Inf	Markeling Activities Traveler/Contact Cards Res Cards More Fields Travel History
Corporate Profile S of Name	elsure) to Primary
Cither Last	Fi CB Profile Query Level 2
	General Info Marketing Segmentation Activities Traveler/Contact Cards Res Cards More Fields Travel History
	Reminders
	Mailers
	Notes
	Activity Date
Level 2 Query	
Summarize:	Login Name Create Date
***	Mailer Type Mailer ID Create User
TTT General Info	Subject
Profile Type is Equal to [Leisure]	Promo Open
Profile Status is Equal to Active	- Alarm Set
*** Activities	
Mailers	

Activity Date Between "=-7,0,0" [1/19/2016] And "=" [1/26/2016] Subject Starts With "Promo Open"

Replace the Subject field to **Promo Sent** to find email promotions that have been sent. Replace the Subject field to **Promo Click** to find email promotions that have been clicked through within the email.



#### **Clients We Can Market To Via Email:**

Achilies Res Cards Inventor Information Level 1 Level 2 Level 3 use Checker Deshboard Home Profiles Profile Manager Filters	Add Filter Reset All Duplicate Filter Summarize
Profile Manager     Giobal     Giobal     General Info     Communication Marketing Activities     Profile Type [Leisure]     Profile Type [Leisure]     Profile Type [Leisure]     Profile Name	Treveler/Contact Cards Res Cards More Fields Travel History  Modity Filter  Brofile Query Level 3  CB Profile Query Level 3
Level 3 Query Summarize:	TBD Markeling melds General Info Communication Marketing Activities Traveler/Contact Cards Res Cards More Fields Travel History Filter Type: Does Have Communication Records with the following criteria Communications Type E-mail
<ul><li>*** Profile Level 3 Filter Number 1</li><li>(Profile Type [Leisure])</li><li>AND (Profile Status Is Equal to Active)</li></ul>	Primary Description  Finary  Marketing Permission  Yes (checked)

AND (Communication Filter Type: Does Have Communication Records with the following criteria) (Communication Type Is Equal to E-mail) AND (Marketing Permission Is Equal to Y)

#### **Clients With Complete Address Information:**

Level 3 Query Summarize:	-
Level 3 Query Summarize: *** Profile Level 3 Filter Number 1 (Profile Type [Leisure]) AND (Address Line 1 Is NOT BLANK) AND (Zip Code Is NOT BLANK) AND (City Is NOT BLANK) AND (City Is NOT BLANK) AND (State Is NOT BLANK) AND (Profile Status Is Equal to Active) Address Type Includes (Any) Primary Address Bill To Address Ship To Address Alternate Address Is NOT BLANK Address Line 1 is NOT BLANK AND (Profile Status Is Equal to Active)	fistory ress

### Client With No Marketing In The Last 3 Weeks:

Res Cards Inventory Internet Leve	1 Level 2 Jevel 3 Dupe Checker
Profile Manager	ris
	GB Profile Query Level 3
Profile Manager	
	TBO Marketing Fields
	General Info Communication Marketine Activities Traveler/Contact Cards Res Cards More Fields Travel History
	Filter Type: Does NOT Have Activity Records with the following criteria
	Activities
	Activity Tune Besnanded
	Males V
Loval 2 Quary	
Level 5 Query	
Summarize:	
*** Profile Level 3 Filter Num	ber 1
(Profile Type [Leisure])	
(Folie Type [Leisure])	
AND (Profile Status Is Equal	to Active)
AND (Activity Filter Type: D	pes NOT Have Any Activity Records with the following criteria)
(Mailers (All))	
(IVIAIIELS (AII))	

AND (Activity Date Is From "=-21,0,0" [1/5/2016] to "=" [1/26/2016])

#### **New Customers Last 7 Days**

General Info Mar	keting 📗 Segmenta	tion Activities	Traveler/Contact	Cards	Res Cards	More Fields	Travel H	istory
Profile Type [Leisure	e/Corporate]	-	to		Communica Type	ations	Primary	
Profile Name					Entry		Descrip	tion
Last	First	Middle	Courtesy Title	•				•
Additional Name								
		iipito 🛄 Ai	iternate Address					
Second Address Address Line 1	From JAN				Special Da <u>Mon</u> From To	tes th <u>Day</u> T	Year <u>Type</u>	•
Second Address Address Line 1 Address Line 2	From JAN		pt./Suite		Special Da <u>Mon</u> From To Profile Crea	tes th <u>Day</u> ate Date	Year <u>Ivpe</u>	•
Second Address Address Line 1 Address Line 2 Zip Code	From JAN		pt./Suite		Special Da <u>Mon</u> From To Profile Crea =-7,0,0	tes th Day Y T	Year <u>Type</u>	•
Second Address Address Line 1 Address Line 2 Zip Code Country	From JAN	r To DEC	pt./Suite	•	Special Da Moni From To Profile Crea =-7,0,0 Profile Crea	tes th Day Y T T T T T T T T T T T T T T T T T T T	Year Type	•
Second Address Address Line 1 Address Line 2 Zip Code Country Marketing Permissio		r) To DEC	pt./Suite	•	Special Da Moni From To Profile Crea =-7,0,0 Profile Crea	tes th Day 1 th Day 1 th Day 1 th Day 1 to to the User the User	Year Type	•

#### Level 2 Query Summarize:

\*\*\* General Info \_\_\_\_\_

Profile Type Is Equal to [Leisure/Corporate]

Profile Create Date Between "=-7,0,0" [1/19/2016] And "=" [1/26/2016] Profile Status Is Equal to Active

#### **Passports Expiring Within the Quarter**

Profile Manager			
Profile Remind Note Mailer Card Inventory Print Lober Sater PNR E-mail Glance Go To Delete Activities Res Cards Inventory Internet Deckhard University Profiles			
Profile Manager			Fito:
Profile Manager     Global     General Info     Marketing     Act     Profiles     Manager     General Info     Marketing     Act     Profiles     District     Distri     Distri	to to travelet/Contact Cards Res Cards More Fi to to travelet/Contact Cards Res Cards More Fi to travelet/Contact Cards Res Cards More Fi to travelet/Contact Cards Res Cards More Fi to travelet/Contact Cards Res Cards More Fi travelet/Contact Res Cards More Fi tra	elds Travel History	Reten     Court      Ecolumns     Court      Court
	General Info Marketing Segmentation	n Activities Traveler/Contact Cards	Res Cards More Fields Travel History
	× .	▼ Coultra Chinashia	Deschard
Level 2 Query	Birth Date		
Summarize:	To 🔽 ,	Salutation/Nickname	
*** General Info	Address	Is Primary Traveler/Contact	
Profile Status Is Equal to Active	Address Line 1		
	Zip Code	City	▼
*** Traveler/Contact	Country		Ħ
Expiration Between "=" [1/26/2016]	Marketing Permission	T Invalid	
And "=0,+3,0" [4/26/2016]	Communication Type Entry	Description	Primary
	Passport		
	Primary Passport 1	lumber <u>Issuing City</u>	ntry
	Expiration	Issue Date	
		▼ to =0,+3,0 ▼	▼ to ▼

# Saving Queries

- Using Level 1, 2, or 3 query, enter your query filters and run your query. Use date formulas as described below if applicable.
- Customize the columns used in the query by selecting the Columns button on the right.
- To change a column, move the highlighted column over to the other side by using the > or < arrow. By using the shift key and mouse, select as many consecutive entries as you want to move and use the > or < arrows. By using the control key and your mouse, you can select non-consecutive entries to move. Use the up and down arrows to order the selections.
- To sort up to 3 columns in ascending or descending order, click *Sort by Columns*. You can also arrange, size, and sort the columns in the Query on the result screen by inserting the mouse between the column headers (see a bidirectional arrow), holding down the left-mouse button, and pulling the columns to the new size. Pull any column to a new location by using the mouse. To sort, hold down *Shift* and click a column header one time for ascending order, and once again for descending order.

Le	vel 1 Lev	el 2 Level 3 Dupe	Checker Results							
Fi	lters . (Profile	Type [Leisure]) A	ND (Profile Status Is Eq	ual to Active) AND	) (Com	munication Filter T	ype: Does NOT Have Any Comm	nunication Records	Add Filter Modify Filter Delete Filter	Reset All Summarize Ø Refresh
Ρ	rofiles				10				Count	Columns
1	Profile Type	Name (PROFILE)	Address Line 1 (PRIMAR)	City (PRIMARYADI	State (	PI Zip Code (PRIMAR)	Comm. Entry (PRIMARYEMAILTABLE)	Primary Agent (PROFIL	51	~
Þ	L.	Collins/Joan	876 Garden Dr	Books	NY	12309		Beth Vollmar		
	L	Lawson/Craig	2556 Boston Branch Cir	Boston	MA	02654		Beth Vollmar		
	L	Knight/Frank	1048 Otsego Pike	Tontogany	OH	37377		Beth Vollmar		
Π	L	Hudson/Richard	400 River Bend Drive	Curtains	WA	43402		Julie Durham		
Π	L	Stewart/Patrick	1003 River Road	Tower	DC	02765		Julie Durham		
	L	Duncan/Mary	5637 Back Bay Road	Grand Rapids	VA	20120		Marcie Karavakis		E.
	L	McGovern/Sally	3 Stevens Dr	Holbrook	MA	02343		Stacey Mack		
_										

Fields Available	Fields in Columns	
ALTERNATEADDRTABLE Address Line 1 ALTERNATEADDRTABLE Address Line 2 ALTERNATEADDRTABLE Apt/Suite ALTERNATEADDRTABLE Apt/Suite ALTERNATEADDRTABLE County ALTERNATEADDRTABLE Description ALTERNATEADDRTABLE Description ALTERNATEADDRTABLE State ALTERNATEADDRTABLE Valid ALTERNATEADDRTABLE Valid ALTERNATEADDRTABLE Valid ALTERNATEADDRTABLE Valid ALTERNATEADDRTABLE Valid BILLTOADDRTABLE Address Line 1 BILLTOADDRTABLE Address Line 2 BILLTOADDRTABLE Address Line 2 BILLTOADDRTABLE City BILLTOADDRTABLE County BILLTOADDRTABLE Marketing Permission BILLTOADDRTABLE Marketing Permission BILLTOADDRTABLE Valid BILLTOADDRTABLE Valid BILLTOADDRTABLE State BILLTOADDRTABLE Zip Code MOREFIELDSTABLE[1].Company DK MOREFIELDSTABLE[2] Driver's License MOREFIELDSTABLE[2] Driver's License MOREFIELDSTABLE[2] Driver's License MOREFIELDSTABLE[2] Driver's License MOREFIELDSTABLE[2] Driver's License	PROFILE Profile Type     PROFILE Name     PROFILE Name     PRIMARYADDRTABLE Address Line 1     PRIMARYADDRTABLE City     PRIMARYADDRTABLE.Zip     Code     PRIMARYPHONETABLE.Comm. Entry     PROFILE.Interface ID     PRIMARYEMAILTABLE.Comm. Entry	

• When satisfied with the query results, go to File > Save Query As.

• From the drop-down Level menu, choose whether you want the query to be Personal (for your own use only), or Global (for the use of everyone in the agency).

- Name the Query
- Click OK. The new query folder is lcated on the left hand side of the Manager screen.

**NOTE**: ClientBase saves the filters and results layout, not the query results. The next time you use the saved query, any new data that has been added since it was created is included in the new query.

			Activities	Res Cards	Inventory	Internet
		<b>Persona</b> l: For your own use only <b>Global</b> : For the use of everyone in the agency	Dashboa	Profile M	<sup>ome</sup> Ianager	Profiles
File	Edit Reports M New Export XML Import Save Query As	Profile View Save As		le Manager Global Corporate Cli Vendors Agents Other Profiles All Profiles Cohort Cohort Ecolo Cast	ts ents s irs i Addresses	
1	Log in Log out Exit Alt+X	OK Cancel		Emails Sent Emails Open Emails Clicke Bonus Name Ensemble Se Ensemble Va Ensemble Lii	n the last 7 Day ed in the last 7 l ed in the last 7 l es elect acations/Vacat estyles	ys Days Days ⋿ ion Therap

Since queries can be saved and retrieved for frequent use, the date fields in all queries allow for date formulas. This means any field that has a date, can also contain a formula for that date. The date formula function allows you to create a query without identifying a specific month, day, day of the wee, and year based upon the date the report is processed.

Remember: Make sure system date and time are correct.

**Benefit:** When entering a date formula, the system converts it to the intended time period to fun queries and/or save them for future use without the need to modify dates.

**Example:** The following table contain sample formulas for specifying dates. Mix and match the absolute and relative parameters in the function. The first number specified the day of the month, the second number specified the month and the third number specified the year. So if you only have the first number filled in, this means you intend this report to reoccur on this day every month, in every year.

If You Want This	Enter This		
1 <sup>st</sup> day of this month:	=1,0,0		
Last day of this month:	=31,0,0		
1 <sup>st</sup> day of this year:	=1,1,0		
Last day of this year:	=31,12,0		
Seven days from now:	=+7,0,0		
Last Monday (will show today if today is Monday)	=Mon		
A week from last Monday	=Mon-1		
Next Monday	=Mon+1		
Three months from now	=0,+3,0		
Six months ago:	=0,-6,0		
One year from now	=0,0,+1		