

## Query Your Travel History and Global Modify to Populate Marketing Codes



### Global Modify for Marketing Codes:

- **Trip Type—Cruise, Package, FIT, Tour-Escorted, Tour-Unescorted, All-Inclusive**

#### ➤ **Cruise:**

\*Profile Level 2 Query  
General Info Tab → Leisure  
Travel History Tab → Travel Categories | Cruise  
Ok → Refresh

**Comment [SU1]:** You can only do this query for cruise and not the other travel types because the travel category in travel history would just be tour and would not differentiate between package/FIT and escorted tour, see below queries for other travel types.

Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select What Type? → Check Cruise  
Global Modify Now  
\*See footnote to global modify only select records from a query

#### **OR**

**Comment [SU2]:** None.

\*Profile Level 3 Query  
General Info Tab → Leisure  
Travel History Tab → Does have travel history records with the following criteria  
Vendor → Is Equal To → Choose a cruise line (ie..Royal Caribbean)  
Select OK  
Add another filter to this level 3 query  
Repeat steps above until you have chosen every cruise line that you sell (including river cruises such as Viking River, AMA Waterways, Uniworld)  
OK → Refresh

Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select What Type? → Check Cruise  
Global Modify Now  
\*See footnote to global modify only select records from a query

#### ➤ **Package and FIT**

\*Profile Level 3 Query  
General Info Tab → Leisure  
Travel History Tab → Does have travel history records with the following criteria  
Vendor → Is Equal To → Choose suppliers offering packages or FIT trips

(ie... Funjet, Travel Impressions, Monograms, American Airlines Vacations, Avanti, Blue Sky Tours, CIE Tours, Down Under Answers, EEI Travel, GOGO, Happy Vacations, Pleasant Holidays, Southwest Airlines Vacations, Delta Vacations, United Vacations, Universal Studios Vacations, Walt Disney Vacations, Y'alla Tours, Quantas Vacations etc.....)

(For each supplier you will do a separate filter)

Select OK

Add another filter to this level 3 query (for each additional supplier)

Repeat steps above until you have chosen every package or FIT supplier that you sell

OK → Refresh

Global Modify records from query above

Utilities | Global Modify

Select Marketing Fields tab

Select What Type? → Check Package & FIT

Global Modify Now

\*See footnote to global modify only select records from a query

### ➤ **Tour Escorted**

\*Profile Level 3 Query

General Info Tab → Leisure

Travel History Tab → Does have travel history records with the following criteria

Vendor → Is Equal To → Choose an escorted tour company supplier (ie.. Globus, Cosmos, Trafalgar, Insight, CIE Tours, Tauck)

(For each supplier you will do a separate filter)

Select OK

Add another filter to this level 3 query (for each additional supplier)

Repeat steps above until you have chosen every cruise line that you sell

OK → Refresh

Global Modify records from query above

Utilities | Global Modify

Select Marketing Fields tab

Select What Type? → Check Tour Escorted

Global Modify Now

\*See footnote to global modify only select records from a query

### ➤ **Tour Non-Escorted**

\*Profile Level 3 Query

General Info Tab → Leisure

Travel History Tab → Does have travel history records with the following criteria

Vendor → Is Equal To → Choose a tour company that offers packaged tours non-escorted supplier (ie.. Monograms, Avanti, CIE Tours, Central Holidays)

(For each supplier you will do a separate filter)

Select OK

Add another filter to this level 3 query (for each additional supplier)

Repeat steps above until you have chosen every cruise line that you sell

OK → Refresh

**Comment [SU3]:** This category is more for the companies that offer a complete package similar to an escorted tour, where activities, sightseeing, etc.. is included but there is no tour guide & you do not travel in a group but everything is pre-arranged.

Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select What Type? → Check Tour Non-Escorted  
Global Modify Now  
\*See footnote to global modify only select records from a query

➤ **All-Inclusive**

\*Profile Level 3 Query  
General Info Tab → Leisure  
Travel History Tab → Does have travel history records with the following criteria  
Vendor → Is Equal To → Choose a all-inclusive company (ie.. Club Med, Sandals, SuperClubs, Palace Resorts)  
(For each supplier you will do a separate filter)  
Select OK  
Add another filter to this level 3 query (for each additional supplier)  
Repeat steps above until you have chosen every cruise line that you sell  
OK → Refresh

**Comment [SU4]:** Most all-inclusive resorts are booked via a tour company, ie..funjet, however, there are a few companies that it is not unusual to see an agent book direct with that company, ie.. Sandals—and of course, most all (if not all) Club Med vacations are booked direct so if an agent books a particular all-inclusive company direct then we can query on that supplier to achieve the all-inclusive marketing code selection

Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select What Type? → Check All-inclusive  
Global Modify Now  
\*See footnote to global modify only select records from a query

• **Budget**

➤ **Economy**

Profile Level 3 Query  
General Info Tab → Leisure  
Travel History Tab → Invoice Total Fare → from \$1,000 to 1,500 Ok → Refresh

Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select What Budget? → Check Economy  
Global Modify Now

➤ **Moderate**

Profile Level 3 Query  
General Info Tab → Leisure  
Travel History Tab → Invoice Total Fare → from \$1,500 to 3,000 Ok → Refresh

Global Modify records from query above

Utilities | Global Modify  
Select Marketing Fields tab  
Select What Budget? → Check Moderate  
Global Modify Now

➤ **Deluxe**

Profile Level 3 Query  
General Info Tab → Deluxe  
Travel History Tab → Invoice Total Fare → from \$3,000 to (leave blank) Ok → Refresh

Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select What Budget? → Check Deluxe  
Global Modify Now

- **With Whom?**

➤ **Family: Young or Family: Teen**

\*Profile Level 3 Query  
General Info Tab → Leisure  
Family/Employee Tab → Birth date →  
Family: Young set birth date range from Jan. 1 1996 to Dec. 31, 2008 (will pull 12 & under)  
Utilities | Global Modify  
Select Marketing Fields tab  
Select With Whom? → Check Family: Young  
Global Modify Now

Modify Query and set birth date range from January 1, 1990 to December 31, 1997  
Ok → Refresh  
Global Modify records from query above  
Utilities | Global Modify  
Select Marketing Fields tab  
Select With Whom? → Check Family: Teen  
Global Modify Now  
\*See footnote to global modify only select records from a query

You can also change the birthdates for January 1, 1973 to December 31, 1991 for Single:Young or Couple:Young for the up to 35 years old age range

You can use January 1, 1958 to December 31, 1973 for Single:Mature or Couple:Mature for ages 35-50.

For Single:Sr.Citizen and Couple:Sr.Citizen you can use any ‘To’ December 31, 1957.

**\*Footnote:**

When you run the queries you may decide to global modify all profiles that are populated with the query; however, if you do not want to modify all profiles but only select profiles from the query, then follow the below instructions;

From your queried profiles, while holding down the Control key click on only the profiles that you would like to modify. Then follow the global modify instructions above however before clicking Global Modify Now, in the bottom right hand corner in the Include Records box choose Selected Results in Profile Manager. This will only modify those you individually selected.

**Recommended Query & Global Modify with Select Profiles:**

- **Where?**

\*Profile Level 3 Query

Res Card Tab → Does have travel history records with the following criteria

Region/Destination → Is Equal To → Select a Destination (ie..Alaska)

(For each destination you will do a separate query)

OK → Refresh

Global Modify records from query above (Recommended to individually select only the profiles that you know will want to travel back to that destination—refer to footnote above to individually selecting profiles & globally modifying)

Utilities | Global Modify

Select Marketing Fields tab

Select Where? → Check Alaska

Global Modify Now