

# ***ClientBase Marketing Services User Manual***

July, 2016

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# Chapter 1: ClientBase Marketing Services

## Introduction

*ClientBase Marketing Services is pleased to provide a turnkey centralized marketing solution. ClientBase Marketing Services is fully integrated with ClientBase®, a CRM tool. This allows marketing that is more targeted, with automated email marketing campaigns that will be segmented by customer travel preferences and travel history.*

## ClientBase Marketing Services Benefits

ClientBase Marketing Services offers many benefits that enhance the marketing experience.

- ClientBase Marketing Services offers an automated ordering system for email campaigns.
- ClientBase Marketing Services displays your orders within a customized marketing calendar so you can keep track of what campaigns you've selected and sent out.
- Agency receives a notification email prior to every email campaign launch.
- Customers' profiles are automatically updated with mailer records in ClientBase® to reflect the promotions they have received, opened or clicked on an embedded link to read more information on the promotion
- ClientBase Marketing Services automatically sends email campaigns on your behalf to select customers, based on data from your ClientBase® records.
- The email templates are customized with agency branding: agency logo, agency email address, mailing address and phone number.
- You can personalize your emails to be sent from the Primary Agent.
- Email performance analytics are provided for each campaign, including open rates and click through rates.

## Preparing Your Customer Database

To ensure that your email marketing campaigns are successfully received by customers, it's important that your database reflect quality data. Follow these steps to ensure the integrity of your agency's customer data.

- Collect full customer name, including first and last name.
- Collect full mailing address, including city, state and zip code.
- Collect customer email address with marketing permissions and associated state.

ClientBase Marketing Services uses the marketing selection criteria in ClientBase® CRM, to automatically select customers to receive the email campaign. In addition to the above items, there are other specific steps you should be completing within your ClientBase® CRM:

- Create Res cards for all tour and cruise reservations.
- Enter marketing codes for every profile, including desired destinations, type of travel, client interests, and trip budget.
- Check marketing permissions for each customer profile.

## Chapter 2: Log On and Set Up ClientBase Marketing Services

*This section outlines in detail how to log on and set up ClientBase Marketing Services for your agency.*

- *Login to ClientBase Marketing Services*
- *Set Up ClientBase Marketing Services for your agency*

### ClientBase Marketing Services Log On

Login to ClientBase Marketing Services by going to:

<http://www.clientbasemarketing.com/cbms/login.jsp>

A screenshot of the login form. It has a blue header with the word 'Login'. Below the header, there are two input fields: 'Email Address:' and 'Password:'. Below the 'Password:' field are two buttons: 'Reset' and 'Login'. At the bottom of the form, there are two links: 'Contact Us' and 'Forgot Password'.

**Step 1:** Enter your **Email Address** and **Password** that you set up when registering.

**Step 2:** Click on the **Login** Button

**NOTE:** The password does not expire. ClientBase Marketing Services will not lock you out if the password is incorrectly input. ClientBase Marketing Services will automatically log you out after 20 minutes of non-activity, at which time you'll have to log back on.

### ClientBase Marketing Services Home Page

Upon log-in to ClientBase Marketing Services, the Home page appears as the default view. The main toolbar located at the top of the site has seven (7) tabs: Home, My Profile, My Calendar, Promotions, Training, Contact Us and Logout.



**Home:** Displays the marketing calendar of email pieces.

**My Profile:** Displays administrative items related to executing email promotions.

**My Calendar:** Displays the full calendar which extends past the “Next 60 Days” shown on the home page

**Promotions:** Displays current promotions that are selected or past promotions.

**Training:** Displays the WebEx training page for future WebEx trainings.

**Contact Us:** Displays a form to connect you with your assigned ClientBase® Marketing Manager for any ClientBase Marketing Services questions.

**Logout:** Enables you to log out of ClientBase Marketing Services.

## Agency Profile Set Up

To set up your agency's profile in ClientBase Marketing Services, you will need to follow each of the steps below. Each step is further detailed on the subsequent pages.

**Step 1:** *Verify Agency Profile*

**Step 2:** *Seller of Travel IDs*

**Step 3:** *Upload Logo*

**Step 4:** *Select Primary Suppliers*

**Step 5:** *Select Marketing Options*

The information that you provide on any of these steps can be changed at any time. You are never locked into the information that is initially included. The ClientBase Marketing Services administrator can make the changes.

### Step 1: Verify Agency Profile

Once logged into ClientBase Marketing Services, go to **My Profile| Edit Profile**.

**1) Review the pre-populated data from your registration.** You will only need to do this one time. The main agency information should be reflected in this section.

**2)** Make any corrections, if needed and scroll to the bottom for the *Update Profile* button. Click on *Update Profile* to save your changes.

**3)** If all the information appears to be correct, go back to **My Profile** on the menu bar and locate and click on **Seller of Travel IDs**.

### Step 2: Seller of Travel IDs

Once logged into ClientBase Marketing Services, go to **My Profile|Seller of Travel IDs**.

**My Profile**

**One Big World Travel State/Province Seller of Travel ID Numbers**

Currently these US states and Canadian provinces require travel agencies to register with them as a registered Seller of Travel. In order for CBMS to send marketing on your behalf, you need a Seller of Travel License Number, if any of the scenarios below are "YES" for that state/province. It is your responsibility to comply with all Seller of Travel rules.

State/Province	Agency Located In State/Province	Consumer Located In State/Province
<a href="#">British Columbia</a>	YES	YES
<a href="#">California</a>	YES	YES
<a href="#">Florida</a>	YES	YES
<a href="#">Hawaii</a>	YES	YES
<a href="#">Iowa</a>	YES	YES
<a href="#">Ontario</a>	YES	YES
<a href="#">Quebec</a>	YES	YES
<a href="#">Washington</a>	YES	YES

Enter registration numbers below. Please enter only the registration number (Example ST4564, 550000-00, etc). Invalid entries may prevent CBMS from being able to send on your behalf.

State/Province	Seller Of Travel License Number
BC	
CA	9999999
FL	1111111

The Seller of Travel information appears on email campaigns for travel agencies in five (5) states: Washington, California, Florida, Hawaii and Iowa, and three Canadian provinces: British Columbia, Ontario and Quebec. The names of the states/provinces are hyperlinks to the sites that describe the seller of travel information and how to get the required numbers.

**The table** indicates with a **YES** if the agency is located in State/Province and requires a number to send email in state/province and out of state/province and **YES** if an agency is out of state/province and requires a seller of travel number to send email marketing to consumer in that State/Province.

- 1) Enter your agency Seller of Travel number for the applicable state/province.
- 2) Once the information has been entered, click on the 'Save' button.
- 3) Go back to **My Profile** on the menu bar and locate and click **Upload Logo**.

### Step 3: Upload Logo

To add or change your logo which appears on your email campaign, go to **My Profile|Upload Logo**.

**My Profile**

**Upload Logo**

Our logo system enables you to insert your logo into the promotions automatically. The size and format of your logo is very important, please click on the Help Loading link below for these specifics and if you would like logo assistance.

You also have the ability to turn the logo feature on or off immediately. To access this feature click the Edit Image button. If your logo is turned off, our system will pass through the agency contact information stored in your Profile. To edit your contact information click the My Profile menu option.

Agent Logo [Help Loading](#) [Edit Image](#)



- 1) To add a logo, click on the '**add logo**' button. Once updated, a thumbprint view of your logo will appear. The format should be a .jpg or .gif file type. The width should be no wider that 500pixels, less is better. If the logo is larger

than 500 pixels, you can send it to [Trams.CBMSSupport@sabre.com](mailto:Trams.CBMSSupport@sabre.com) and we can resize it for you.

2) If the logo appears to be correct, go back to **My Profile** on the menu bar and locate and click on **Primary Supplier**.

## Step 4: Select Primary Suppliers

To ensure automated email sends for specific suppliers, go to **My Profile|Primary Suppliers**.

The screenshot shows the 'My Profile' dropdown menu on the left with 'Primary Suppliers' highlighted. To the right is the 'One Big World Travel Supplier List' table. The table has three columns: 'Supplier Name', 'Selected', and 'Type'. The 'Selected' column contains checkboxes, most of which are checked. The 'Type' column lists various travel categories like River Cruise, Tour, Cruise, Rail, and Other.

Supplier Name	Selected	Type
AMA Waterways	<input checked="" type="checkbox"/>	River Cruise
Abercrombie & Kent	<input checked="" type="checkbox"/>	Tour
Adventures by Disney	<input type="checkbox"/>	Tour
African Travel	<input checked="" type="checkbox"/>	Tour
Air New Zealand Vacations	<input checked="" type="checkbox"/>	Tour
Alpine Adventures	<input checked="" type="checkbox"/>	Tour
American Safari Cruise	<input checked="" type="checkbox"/>	Cruise
Amtrak Vacations	<input checked="" type="checkbox"/>	Rail
Apple Vacations	<input checked="" type="checkbox"/>	Tour
Asian Vistas	<input checked="" type="checkbox"/>	Tour
Avalon Waterways	<input checked="" type="checkbox"/>	River Cruise
Avanti Destinations	<input checked="" type="checkbox"/>	Tour
Azamara Club Cruises	<input checked="" type="checkbox"/>	Cruise
Blue Sky Tours	<input checked="" type="checkbox"/>	Tour
Brendan Vacations	<input checked="" type="checkbox"/>	Tour
CBMS	<input checked="" type="checkbox"/>	Other

1) Review the list of Supplier Names.

2) Once you have identified a supplier that you would like to ensure automated email sends, place a check mark in the box under the column header Selected. You can select as many suppliers as you want to. By checking these suppliers you are saying you want to be automatically included for any promotions related to that supplier. You still have the option to opt out of any promotions you want. This will just load them on your calendar automatically.

3) Click "Update Primary Suppliers" button at the bottom of the screen.

4) If all the information appears to be correct, go back to **My Profile** on the menu bar and locate and click on **Marketing Options**.

**NOTE:** Email campaigns that appear in your calendar will be auto-selected based on your supplier selections. The customers that receive emails are determined based on the marketing codes or travel history in their profile in Clientbase.

## Step 5: Select Marketing Options

Select marketing options by going to **My Profile|Marketing Options**.



<b>My Profile</b> Edit Profile Seller Of Travel IDs Change Password View Agreement Upload Logo Primary Suppliers <b>Marketing Options</b> Manage Opt Outs/Bounces	<b>CBMS</b>		<input type="checkbox"/>
	Ezine		<input checked="" type="checkbox"/>
	Supplier Promotions		<input checked="" type="checkbox"/>
	<b>TouchBase Program</b>		<input type="checkbox"/>
	Anniversary Emails		<input checked="" type="checkbox"/>
	Birthday Emails - Passenger emails only		<input type="checkbox"/>
	Birthday Emails - Primary email for no Passenger email		<input checked="" type="checkbox"/>
	Bon Voyage Emails		<input checked="" type="checkbox"/>
	Holiday Emails		<input checked="" type="checkbox"/>
	Passport Expiration Emails		<input checked="" type="checkbox"/>
	Supplier Triggered Email Marketing		<input checked="" type="checkbox"/>
	Survey		<input checked="" type="checkbox"/>
	Thank You for Your Inquiry		<input checked="" type="checkbox"/>
	Thank You for Your Referral		<input checked="" type="checkbox"/>
	Welcome Home Emails		<input checked="" type="checkbox"/>
Welcome to the Agency Emails		<input checked="" type="checkbox"/>	
<input type="button" value="Save Settings"/>			

- 1) Select *Supplier Promotions*, if it is not already checked. You can also select *Ezine* if you wish to send Ezines to your customers.
- 2) Click the button labeled **Save Settings**.

## Step 6: Manage Opt Outs/Bounces

Select options for handling Opt Outs, SPAM complaints and Bounces by going to **My Profile|Manage Opt Outs/Bounces**.

<b>My Profile</b> Edit Profile Seller Of Travel IDs Change Password View Agreement Upload Logo Primary Suppliers Marketing Options <b>Manage Opt Outs/Bounces</b>	<b>Manage Opt Outs/Bounces</b>	
	Please select from the following options for handling Opt Outs, SPAM complaints, and Bounces. You may check as many as you wish.	
	Receive email when Opt Out or SPAM complaint received	<input checked="" type="checkbox"/>
	Add Mailer record when Opt Outs, SPAM Complaints, and Hard Bounces are received	<input checked="" type="checkbox"/>
	Automatically remove marketing permission for Opt Outs and SPAM Complaints and create a Mailer record stating the permission was removed	<input checked="" type="checkbox"/>
	<input type="button" value="Clear Fields"/> <input type="button" value="Update"/>	

**Options include:** Receive email when Opt Out or SPAM complaint received; Add Mailer record when Opt Outs, SPAM Complaints, and Hard Bounces are received; and Automatically remove marketing permission for Opt Outs and SPAM Complaints and create a Mailer record stating the permission was removed.

# Chapter 3: Marketing Calendar

Every agency that has ClientBase Marketing Services, [accesses](#) their own marketing calendar based on the available marketing campaigns created. It's important to look at the ClientBase Marketing Services marketing calendar weekly to ensure that you are satisfied with the selections that have been made on your behalf.

- Review and understand your marketing calendar and available marketing content
- Understand the anatomy of email marketing campaign

## Reviewing the Marketing Calendar

The marketing calendar is located on the '**Home**' tab of the Blue tool bar. The calendar is divided into three (3) sections: Messages, Your Marketing Calendar-the next 60 days, and Available Promotion Preview.

<a href="#">Home</a> <a href="#">My Profile</a> <a href="#">My Calendar</a> <a href="#">Promotions</a> <a href="#">Training</a> <a href="#">Contact Us</a> <a href="#">Logout</a>					
Alerts					
Date		Message			Action
Jun 25		CB database sync outdated - last sync 06/08/15			delete
Your Marketing Calendar - The Next 60 Days					
June 2015					
26	TouchBase Program	TouchBase	Bon Voyage *	Email	Opt Out
26	TouchBase Program	TouchBase	Happy Anniversary	Email	Opt Out
26	TouchBase Program	TouchBase	Welcome Home	Email	Opt Out
29	TouchBase Program	TouchBase	Happy Birthday Wishes	Email	Opt Out
29	TouchBase Program	TouchBase	Thank You for Your Inquiry	Email	Opt Out
29	CBMS	Ponant Yacht Cruises & Expeditions	Ponant Yacht Cruises Email Promotion	Email	Opt Out
30	TouchBase Program	Shore Excursions	Shore Excursions for Your Upcoming Cruise	Email	Opt Out
30	TouchBase Program	Shore Excursions	Shore Excursions for Your Upcoming Cruise	Email	Opt Out
30	TouchBase Program	Shore Excursions	Shore Excursions for Your Upcoming Cruise	Email	Opt Out
30	TouchBase Program	TouchBase	Reminder that Your Passport is About to Expire	Email	Opt Out
July 2015					
1	TouchBase Program	TouchBase	Welcome to the Agency	Email	Opt Out
3	TouchBase Program	TouchBase	Bon Voyage *	Email	Opt Out
3	TouchBase Program	TouchBase	Happy Anniversary	Email	Opt Out
3	TouchBase Program	TouchBase	Welcome Home	Email	Opt Out
6	TouchBase Program	TouchBase	Happy Birthday Wishes	Email	Opt Out
6	TouchBase Program	TouchBase	Thank You for Your Inquiry	Email	Opt Out
6	CBMS	Celebrity Cruises	Celebrity Cruises Email Promotion	Email	Opt Out

## Messages

ClientBase Marketing Services uses this section to provide you with relevant information and/or alerts about our marketing programs.

## Your marketing calendar the next 60 days

This section is pre-populated with email marketing campaigns that have been selected for your agency to execute. Email campaigns that appear in your calendar, are auto-selected based on your supplier selections. The current view allows you to view the campaigns that are set to launch over the next 60 days. To view the complete 12 month marketing calendar, click on the [blue words](#) '[See Your Complete Marketing Calendar](#)' at bottom of screen.

**NOTE:** If your agency participates in ClientBase® Marketing Services and/or the Touchbase® program, this marketing content will appear co-mingled. Your calendar will show all the content labeled by the marketing program so you have a complete picture and timing of all your marketing items.



Directions on how to **Opt-Out** of marketing content from this section is available in section below entitled, *How to Opt-Out of a Marketing Campaign..*

## Your Complete Marketing Calendar

After clicking on [Your Complete Marketing Calendar](#), the system expands to give you access the full 12 months of upcoming offers.

**NOTE:** Most calendar items are added a month at a time for the upcoming month.

Current Marketing Calendar

Dates

-

Marketing Program

Supplier Name

Marketing Option

Type

Search

June 2015

20	TRAMS Internal	E-mail Tools	Responsive TouchBase Test	Email	Edit
26	TouchBase Program	TouchBase	Bon Voyage *	Email	Opt Out
26	TouchBase Program	TouchBase	Happy Anniversary	Email	Opt Out
26	TouchBase Program	TouchBase	Welcome Home	Email	Opt Out
29	TouchBase Program	TouchBase	Happy Birthday Wishes	Email	Opt Out
29	TouchBase Program	TouchBase	Thank You for Your Inquiry	Email	Opt Out
29	CBMS	Ponant Yacht Cruises & Expeditions	Ponant Yacht Cruises Email Promotion	Email	Opt Out
30	TouchBase Program	Shore Excursions	Shore Excursions for Your Upcoming Cruise	Email	Opt Out
30	TouchBase Program	Shore Excursions	Shore Excursions for Your Upcoming Cruise	Email	Opt Out
30	TouchBase Program	Shore Excursions	Shore Excursions for Your Upcoming Cruise	Email	Opt Out
30	TouchBase Program	TouchBase	Reminder that Your Passport is About to Expire	Email	Opt Out

Use the Search Criteria to view past promotions that you participated in, or search by *Marketing Program, Supplier name, Marketing Option or Type.*

**Description of the promotion:** Promotion names that are in blue have full details. Use your mouse to hover over the link and see the promotion description.

Each item on the calendar indicates:

- The **date** reflects the Process Date for the campaign
- The Marketing Program shows all the programs you are participating in
- The **supplier** being featured
- The **title** of the promotion. If you hover over the promotion title in **blue** you will see the promotion description
- The **promotion type** email

On the right-side of the calendar listing you may see either *Opt Out* or *Edit*:

**Defining Opt Out.** For events in the future that do not yet have an order associated with the promotion, you will see 'Opt out' next to the promotion. Clicking 'Opt out' will remove the item from your calendar so no order will be created when the time comes.

**Defining Edit.** 'Edit' indicates an order already exists for the calendar item. You can still opt out of these by clicking 'Edit' then clicking the 'Cancel Order' button. You can also change the date the promotion is scheduled to be sent out.

## Available Promotion Preview

Also on the Marketing Calendar is a section at the bottom, *Available Promotion Review:*

Available Promotion Preview				
Supplier Name	Program	Description	Type	
Funjet Vacations	CBMS	Excited by Savings Relaxed by Dominican Republic	Email	Order
TouchBase	TouchBase Program	Happy Canada Day	Email	Order
TouchBase	TouchBase Program	Happy 4th of July	Email	Order
Trams and ClientBase Products and Services	TRAMS Internal	ClientBase can help you grow your customer list	Email	Order

[View Current Promotions](#)

This section displays all the email marketing content that is live in the system. If the promotion listed is on one of your selected Primary Suppliers, it will be added to your Marketing Calendar and sent out automatically for you. You would only need to manually order promotions if it is on a supplier that is not one of your Primary Suppliers, or if you wish to order a Holiday card with the TouchBase Program.

**NOTE:** Directions on how to **Opt-Out** of marketing content from this section is available in section below entitled, *How to Opt-Out of a Marketing Campaign*.

## Anatomy of Email Marketing Details Screen

When you select any email campaign in your Marketing Calendar by clicking on the description title, this is what you see:

Supplier Name	Program	Description
Funjet Vacations	CBMS	<a href="#">Excited by Savings Relaxed by Dominican Republic</a>



### Promotion (11471): Excited by Savings Relaxed by Dominican Republic

Title:	Excited by Savings Relaxed by Dominican Republic
Supplier:	Funjet Vacations
Type:	Email
Marketing Partner ID:	A1471
Promotion Period:	06/17/15 To 07/06/15
Travel Period:	06/19/15 To 12/12/15
Subject Line:	Excited by Savings Relaxed by Dominican Republic
Promotion Sample:	<a href="#">View Promotion</a>
Details:	

### Promotion Details and Selection Criteria

### Promotion Description Fields

If you would like to order this promotion and use the recommended selection criteria, no action is required and the promotion will be sent on your behalf. If you choose to select the clients to receive this promotion, you must put the **Marketing Partner ID A1471** in ClientBase by June 23, 2015. For complete directions [CLICK HERE](#). If a code is created but no profiles are marked, we will use the recommended selection criteria and send out the promotion.

If you are selecting the clients to receive this promotion, we recommend the query below.

#### Selection Criteria :

- Travel History for Funjet Vendor ID 5066, 5074, 5162, 5143, 55 (not including emails for profiles that have res cards with trip start dates between 6/1/2015 and 12/31/2015)
- Trip Type: Tour or Package or Budget: Up to \$3,000 or Moderate or Budget OR Pax Type: Couple Mature or Couple Sr. Citizen or Single Mature or Single Sr. Citizen AND Destination: Caribbean or Mexico OR Interests: Adventure or All-Inclusive or Beach/Sun or Diving/Watersports or Family Vacations or Hiking/Walking or Islands resorts/Sun or Luxury Resorts/Hotel or Multi-Sports or Sailing or Sports/Active or Sun/Beach or Watersports or Golf or Spa OR Trip Length: 5 to 10 days (not including emails for profiles that have res cards with trip start dates between 6/1/2015 and 12/31/2015)

Maximum Quantity: 2500

## PROMOTION DESCRIPTION FIELDS

**Title:** Name of promotion.

**Supplier:** The Cruise or Tour company providing the offer.

**Marketing Partner ID:** Used only if you choose to override the default selection criteria. In this case you would create a marketing code in your ClientBase® with the assigned Marketing Partner ID and then add the marketing code to the profiles you want to receive this promotion.

**Promotion Period:** Reflects when the offer is available for booking by the customer.

**Travel Period:** Indicates the travel date range for the customer.

**Subject Line:** The text that appears on the customer's email subject line.

**Promotion Sample:** Enables you to view a sample of the finished email, and reflects your agency information and logo. Double click on the blue text 'View Promotion' to open a new window with the sample email.

**Maximum Quantity:** Reflects how many emails will be included in the distribution of the offer.

### **PROMOTION DETAILS AND SELECTION CRITERIA**

The **Details** section instructs ClientBase® CRM users to include the Marketing Partner ID by a specific date. [See the description of the Marketing Partner ID on the left side of the page.] This must be entered by the date listed. If this code is entered and the profiles are flagged with this code by the proper date then ClientBase Marketing Services will use your suggested list during the list pull, if this is not completed by the date listed then the default selection criteria will be used.

The **Selection Criteria** section reflects what data will be used in targeting customers to receive the email promotion.

# Chapter 4: Marketing Campaign Selections

*ClientBase Marketing Services will provide email marketing content. To ensure appropriate email campaigns reach the best-suited customer with the highest propensity to book that offer, marketing campaigns will be selected for you based on the travel preferences and travel history in your database. The goal is to provide the agency with more marketing to a more targeted audience.*

- Understand how to opt-out of a pre-selected marketing campaign
- Understand how to opt-in to a marketing campaign

## Marketing Campaign Selection & Criteria

ClientBase Marketing Services analyzes the type of customers that you have in your ClientBase® CRM and present marketing selections that best fit your customer. To optimize the analysis of the agency's customer database, we strongly recommend that every customer profile be assigned marketing codes. New ClientBase® CRM users will find a standard set of marketing codes while more experienced ClientBase® CRM user will leverage the standard marketing codes and augment the tool with their own customized marketing codes. ClientBase® will be able to normalize standard and custom marketing codes to ensure that ClientBase Marketing Services is able to conduct the best assessment.

ClientBase Marketing Services looks at the following aggregate customer information:

- Travel Preference
- Booking History
- Cohorts (for some of the consortia programs)
- Demographics from marketing codes/birthdays

## How to Opt-Out of a Marketing Campaign

After reviewing your suggested email campaigns located under **Your Complete Marketing Calendar**, should you not want to execute any of those email campaigns, you can opt-out.

**Step 1:** Go to the **Home|See Your Complete Marketing Calendar** link.

**Step 2:** To the right of the promotion name there will either display an 'Opt Out' link or an 'Edit' link.

You can opt out of a promotion with either option.

**Option 1:** If you select 'Opt Out', the system will immediately remove the campaign from your marketing calendar and return it to the current promotions section.

**Option 2:** If the link says 'Edit', that means an order is associated with the calendar item. Click the 'Edit' link and select the 'Cancel Order' button on the next screen.

The system will update and immediately remove the campaign from your marketing calendar.

**NOTE:** You can 'edit' or 'opt out' of email promotions up until the process date, which is the date listed on the marketing calendar.

## How to Opt-In to a Marketing Campaign

You can also select an alternate campaign or 'opt-in' for a marketing campaign that will replace one that you've opt-out of.

**Step 1:** Go to the *Home* tab, and find the *Available Promotion Preview* section at the bottom of the screen.

**Step 2:** If you already know which marketing campaign you want to select, click on the word **Order** for that particular promotion.

To view the campaign, click on the name of the promotion and a new window will open with a description of the promotion.

**Step 3:** The Order screen will appear for you to make the following selections:

- Preferred Target Send Date (Default date is two days after the date the order is being placed). Minimum number of Days between Sends (Default is 6 days which is the recommended setting).
- Email From Address (Default is the email address that was set up in the ClientBase Marketing Services profile).
- Notes to CBMS (Any additional information regarding the sending of the promotion that needs to be provided).
- Once all the selections have been decided, click on the button labeled 'Order'.

This marketing campaign will now appear in your *Marketing Calendar*.

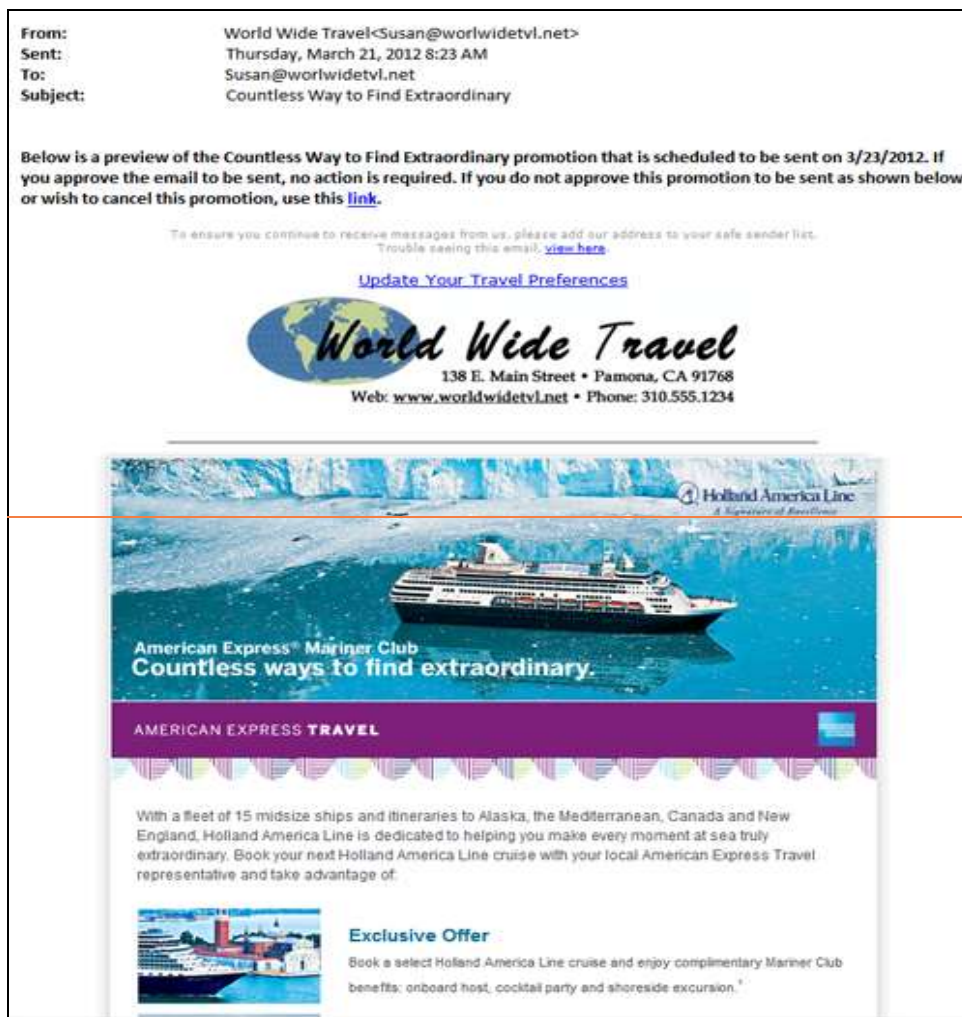
## Email Notifications

Another great benefit of ClientBase Marketing Services is that the program administrator will receive an email notification, for each email campaign that is selected for your agency, prior to the process date. This feature will help your agents to be aware of the timing of the email campaigns so they can be prepared to assist customers calling about the offer.

Multiple resources in the agency can receive the email notification, in addition, to the administrator. Send an email to [Trams.CBMSSupport@sabre.com](mailto:Trams.CBMSSupport@sabre.com) and someone will contact you to add the additional contacts to the email notification distribution. Include in the **Subject** line of your email ClientBase Marketing Services Profile Update.

The email notification will give you the opportunity to cancel the promotion.

Below is a sample of the email notification:





**From:** World Wide Travel <Lindsay@trams.com>  
**Sent:** Monday, June 29, 2015 4:40 PM  
**To:** Chomyn, Lindsay  
**Subject:** Promotion Preview - Excited by Savings Relaxed by Dominican Republic

Below is a preview of the Excited by Savings Relaxed by Dominican Republic promotion that is scheduled to be sent on 7/1/2015. If you approve the email to be sent, no action is required. If you do not approve this promotion to be sent as shown below or wish to cancel this promotion, use this [link](#).

Funjet Vacations  
To ensure you continue to receive messages from us, please add our address to your safe sender list.

Trouble seeing this email? [View Here](#)  
If you would like to opt out, use this link to the [unsubscribe](#)

[Update Your Travel Preferences](#)





# Chapter 5: Reports

Understanding the effectiveness of the marketing campaigns is important for an agency. Reporting is a key tool. The reporting information provided in this manual will only address specific reports that are directly driven by the marketing programs ordered and executed through ClientBase Marketing Services.

There is a wealth of other reports and queries that ClientBase CRM users should learn about and can help them to grow business. Please contact your ClientBase support desk for additional information on reports.

- Understand how to read an email mailer

## Email Mailer

Select **Promotion|Promotion History**. This gives you the summary statistics for your email promotions.

Promotion	Channel	Date Sent	Sent	Opened	Percent	Clicks
2013 Early Booking Discount	Email	09/06/12	523	145	27.7%	13
Last Chance for Balcony Upgrades	Email	08/22/12	799	256	32.0%	20
Summer Splendour & The Suite Life	Email	08/17/12	103	25	24.3%	3

**Promotion:** Name of promotion.

**Channel:** How promotion was sent.

**Send Date:** The date the email was sent to the client.

**Sent:** The number of emails sent to your clients.

**Opened:** The number of emails opened by the clients.

**Open Rate:** The number of people that opened the promotion out of the total number of people that received the email.

**Clicks:** The number of clients that have clicked a link in the promotion.

**NOTE:** The details of “who” opened and click will show in mailer records in ClientBase® CRM.

## Mailers

The details of who received, opened and clicked the email promotions show in the activities tab of your ClientBase profiles in the form of Mailer Tags:

The image displays two screenshots of the 'ClientBase - Mailer (John Kim and Son)' application. The top screenshot shows a mailer record for 'Kam and Sue Able' with a date of activity of 9/26/2012. The bottom screenshot shows the same record with a date of activity of 9/24/2012. Both screenshots show fields for client information, mailer details, and a 'Link to Details' button.

**Client Information:**

- Name: Kam and Sue Able
- Address: 1255 Apple Street, Los Altos, CA 94022
- Phone: +1 (800) 988-1222
- Email: k.able@earthlink.net

**Mailer Details:**

- Date of Activity: 9/26/2012 (Top) / 9/24/2012 (Bottom)
- Time of Mailer: 10:00 AM
- Profile: John Kim and Son
- Response Date: (Empty)
- Mailer ID: 9882
- Create Date: 9/24/2012
- Create User: NV208A

**Subject:** Direct Mail - Escapes Magazine

**Link to Details:** <http://www.earthlink.net/...>

**Footer:** Login Name: NV208A Database: C:\Users\jg002321\Documents\my pdf\com\2012\my\2012 & 2.349.9 9/25/2012 9:30:49 AM 0 Alarm Pulling

The date on the mailer activity indicates the date the promotion is emailed to the client. For Open or Click mailers the date is the date the client opened or clicked the links within the email.

**Mailer Type:** Indicates the promotion was email.

**Subject:** Will start with Promo sent, Promo open, or Promo Click followed by the name of the promotion.

**Link to Details:** A link to an HTML copy of the email is provided for agents to view what was sent to the client.

# Chapter 6: ClientBase Marketing Services

## Promotion Customization

Sections below provide directions on how to customize TouchBase and ClientBase Marketing Services Custom Promotions.

### How to Customize TouchBase Promotions

Using TouchBase? Promotions can be customized. Go to **My Profile|Marketing Options** and use the checkbox on the right of the promotion name you want to send to your clients - this adds the promotion to your calendar.

On the left, click the pencil to customize your message for that promotion:

Click the pencil to customize the message for this promotion.

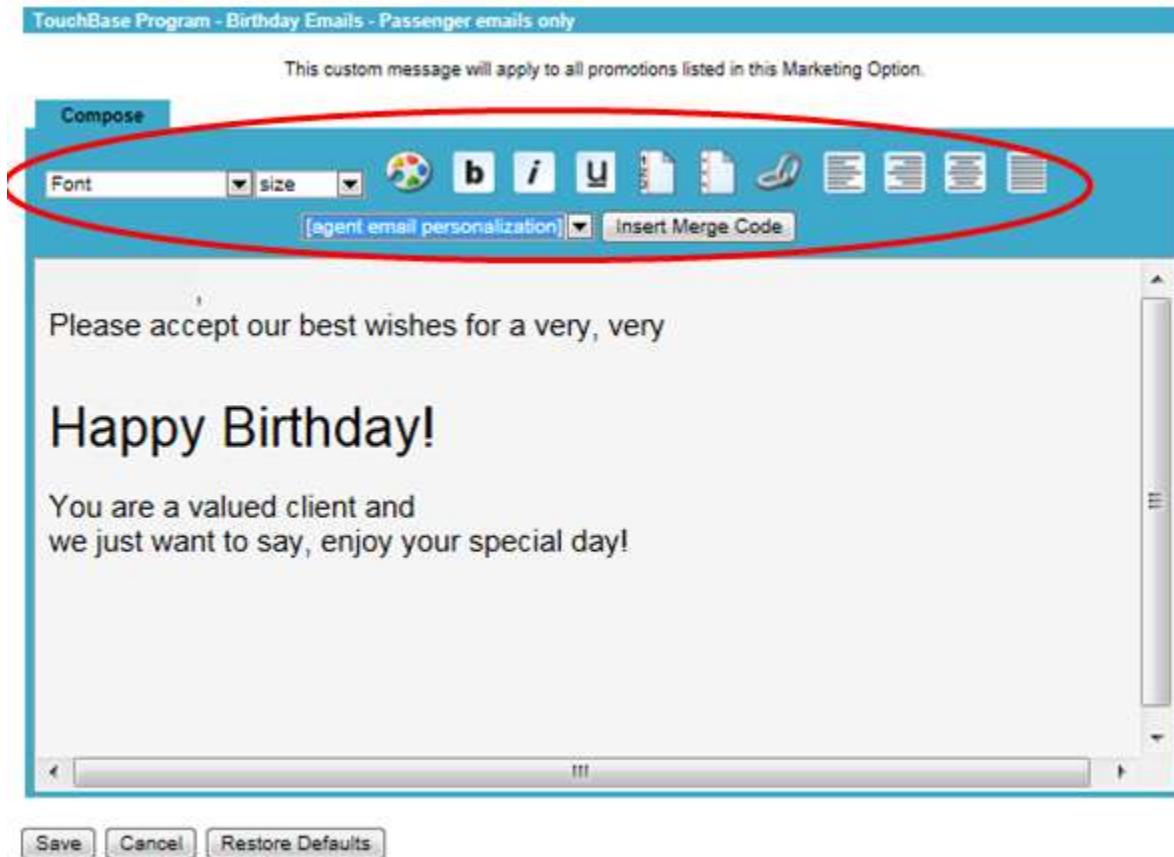
Add promotion to calendar by checking here.

The screen opens with the default message.

To reset the customization, use the Restore Defaults at the bottom of the screen.

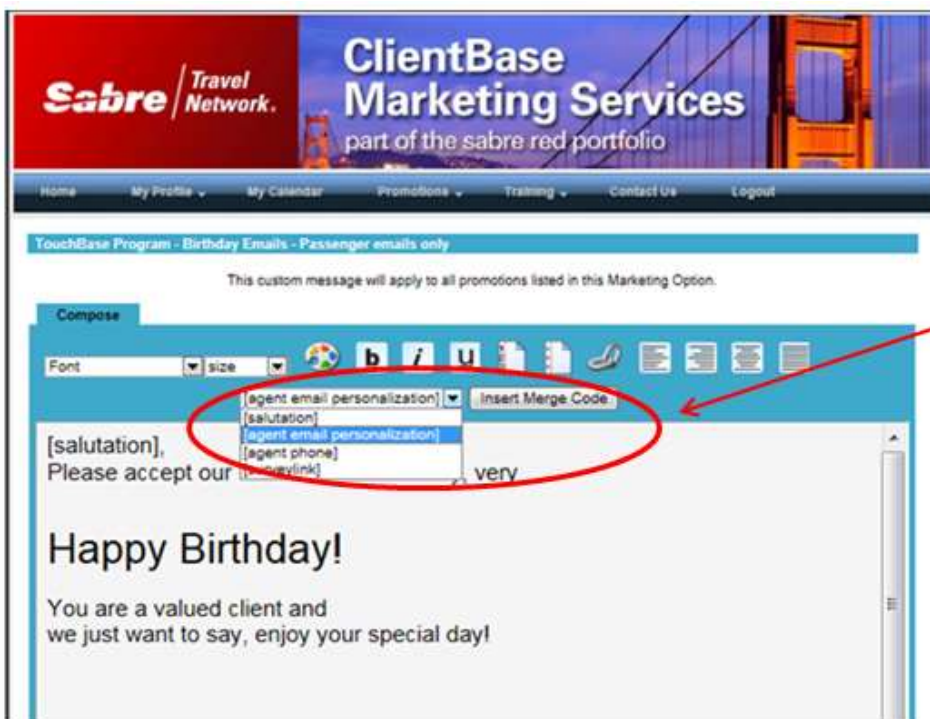
## OPTIONS FOR EDITING

From the customization toolbar, choose the following options for editing the text of the promotion - **Font Size, Font Color, Bold, Italic, Underline, Ordered list, Unordered list, Hyperlink, Text Alignment**.



Once satisfied with your changes, click Save at the bottom of the screen.

## ADD A MERGE FIELD



Move your cursor to the message position you want the merge code added.

Select from the following merge fields: salutation, agent email personalization; agent phone OR survey link.

Click Insert Merge Code.

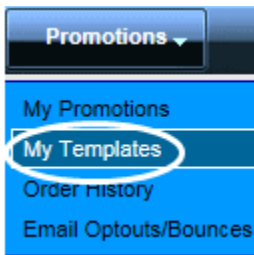




# How to Use CBMS Custom Promotions

If you are a subscriber to ClientBase Marketing Services Custom Promotions, this section describes how to create your own promotions by going to **Promotions|My Templates** on the CBMS Home page. Agencies that are not currently subscribing but are interested in learning more, please contact [your sales rep.](#)

Before you begin a new promotion, however, some preparation needs to be done in ClientBase.



**Step 1)** Using a Level 2 or Level 3 Query, select the clients you want to reach with the promotion you are creating. Use Marketing Codes or Travel History to target the audience.

**Step 2)** Go to **Global Defaults|Profile Defaults|Marketing Codes** to add a new Marketing Code. You'll create a 5-character (alpha-numeric) Marketing Partner ID for your Custom Promotion. This code will be referenced when creating the promotion in ClientBase Marketing Services.



**Marketing Code**

Category  
11. Promotions

Marketing Code  
Rock Your View

Marketing Partner's ID (if applicable)  
RCI15

OK Cancel

**Step 3)** Globally modify the query results from Step 1 with the newly created Marketing Code.

The screenshot shows the ClientBase software interface. The Profile Manager window is open, displaying a list of profiles. A right-click context menu is visible over the profiles, with the 'Add Marketing Code' option highlighted. Below this, the 'Add Marketing Code' dialog is shown, where the 'Promotions' category is selected, and 'Rock Your View' is checked under the 'Promotions' sub-category. A 'Confirm' dialog is also visible at the bottom, asking to 'Add Rock Your View to Selected Results in Profile Manager?'.

**Profile Manager**

Profile	Name (PROFILE)	Address Line 1 (PRIMARY ADDRESS)	City	State	Zip	Link
L	Adrian Romo	1257 Orange Street	San Jose	CA	95128	Link
L	Bernie Benda	2004 Noble Way	San Jose	CA	95128	Link
L	Bernie Taming	388 Avaston Blvd	San Jose	CA	95128	Link
L	Bing Chandler and Monica	124 W 53rd Street	New York	NY	10019	Link
L	Burton Lee	3803 S. 9th Street	San Jose	CA	95128	Link
L	Brown Lee	11 Hermosa Ave	Hermosa	CA	90701	Link
L	Burton Lee	2430 N. Baker St.	San Jose	CA	95131	Link
L	Hibon	14 Hermosa Ave	Hermosa	CA	90701	Link
L	Jackie Kennedy	12504 E. Raintown Street	Scottsdale	AZ	85254	Link

**Add Marketing Code**

Check the Marketing Code you wish to add to the selected Profiles

- ☐ QS Reports - Profile
- ☐ QS Reports - Activities
- ☐ QS Reports - Closed Activities
- ☐ QS Reports - Res Cards
- ☒ How heard
  - ☐ San Jose Mercury ad
  - ☐ Campbell Times
- ☒ Promotions
  - ☐ NO mailings
  - ☐ NO blast emails
  - ☐ NO cruise mailings
  - ☐ No tour mailings
  - ☒ Rock Your View

**Confirm**

Add Rock Your View to Selected Results in Profile Manager?

OK Cancel

The easiest way to add a Marketing Code to a query results screen is to right-mouse click in the ClientBase results screen and click **Add Marketing Code**.

Find the newly created Marketing Code to add it.

**Step 4)** Go to **Promotions|My Templates** on the CBMS Home page to view a directory of templates available for use. See a listing of *CBMS Templates* created by CBMS that are available for you to customize, as well of a list of your previously customized promotions entitled *My Promotions*. Selecting a promotion allows the following options:

- **Create New From:** Create a new promotion from the selected promotion. Promotion details are copied into a new promotion and users may make changes and save.
- **Edit:** Edit the promotion if there are no orders on the promotion.
- **Delete:** Delete the promotion if there are no orders on the promotion.

Click on the template you are customizing. It can be a CBMS Template or one you have already created (*My Promotions*). Click *Create New From*.

The following custom templates are currently available.

	Supplier Name	Subject Line	Available Dates	Status
<input type="checkbox"/>	CBMS Templates	Romance Theme	09/10/10 to 12/31/15	Template
<input checked="" type="checkbox"/>	CBMS Templates	Blank Template with No Logo at the Top	08/26/15 to 12/31/15	Template
<input type="checkbox"/>	CBMS Templates	Blank Template with Logo at the Top	08/26/15 to 12/31/15	Template
<input type="checkbox"/>	My Promotions	An Epicurean Odyssey	08/31/15 to 12/31/15	No Orders
<input type="checkbox"/>	My Promotions	Newsletter Promotion - Basic Format	08/31/15 to 12/31/15	No Orders

Buttons: [Show Expired](#), [Create New From](#), [Edit](#), [Delete](#)

Notice the *Show Expired* button used to see the any expired promotions. These are hidden to keep the list shorter. These promotions can still be used to generate new promotions. There is also a Promotion *Status* column:

- **Template:** Added by Trams as a starting point for promotions.
- **Pending review:** Order has been created and submitted and is awaiting approval to send.
- **Pending:** This is the status of a custom promotion that has been ordered and has not yet expired. The order has been approved and will be sent on the order send date.
- **No orders:** Promotion is in progress and can still be edited. These promotions can be ordered from the home page under Available Promotions.

**Step 5)** After selecting the Promotion to create, click the *Best Practice* link for advice to consider while creating your promotion.



The screenshot shows a web form for creating a promotion. At the top left, a red error message states "All fields are required." To the right of the form, a blue oval highlights a link labeled "Best Practices". The form fields are as follows:

- Marketing Partner ID:** A text box containing "RCI15".
- Promotion Name:** A text box containing "RCI Promotion - September 2015".
- Subject Line:** A text box containing "Rock Your View".
- Image File Path:** A text box that is currently empty.
- Available Images:** A section containing a "Browse..." button, a dropdown menu with a downward arrow, and two buttons labeled "Insert Image" and "Delete Image".

At the bottom of the form, a red message reads: "You must save your work before uploading the first image. Your work will automatically be saved each time an image is uploaded."

**Step 6:** Fill in these first Promotion fields:

**Marketing partner ID (required):** This is the 5 character alpha-numeric field created in Step 2 above to identify the clients you want to receive this email promotion. Any letters should be in all CAPS.

**Promotion name (required):** Identify the promotion.

**Subject line (required):** The subject line of the email you are sending.

**Image file path and Available Images:** (See step below about uploading images if you are including these.)

## Step 6) Start composing the Promotion:

The screenshot displays a web-based interface for composing a promotion. It features two main panels: a 'Compose' panel on the left and a 'Text Version' panel on the right. The 'Compose' panel has a toolbar with various formatting options like bold, italic, underline, and a large text area. The 'Text Version' panel shows the same content in a plain text format, with HTML tags visible for the text version. Below the panels, there is an 'Expiration Date' field set to '12/31/2015' and a red warning message 'All fields are required.' At the bottom, there are buttons for 'Preview Promotion', 'Send Sample', and 'Save'.

**HTML Compose/HTML (required):** This area is where you will enter the body of your email.

Copy HTML from more advanced HTML editors for users that are comfortable editing HTML.

**The Compose screen:** A simple wysiwyg (what you see is what you get) editor that lets you visually design your email. This simple editor includes the ability to change fonts, font size, font color, bold face, italic underline, use numbers or bullets, add a link, add an image that is already on the web or add a table.

**The HTML screen:** This is for users that have experience with HTML. The user can copy HTML from an editor or other web pages. Once pasted in, changes can be made in the HTML or compose tab.

**Text version (required):** All HTML email must have a text version for the few customers that will not accept HTML. If no text version is supplied, the email will receive a higher spam score and will likely not make it to the client's inbox.

**Expiration Date:** This is the date that your promotion will drop off the My Templates screen. Promotions with orders that have been sent will automatically expire. Use the *Show Expired* button to show expired promotions.

**Save:** Use this button to save your work in progress without exiting. Once saved, the promotion will be listed on the **Promotions|My Promotions** and **Promotions|My Templates** screens.

**Cancel:** - Do not save changes and exit this screen

**OK:** - Save changes and exit this screen

**Step 7)** Upload images and insert them into custom promotions.

Image File Path Available Images

Browse...

You must save your work before uploading the first image. Your work will automatically be saved each time an image is uploaded.

HTML

Compose HTML

Font size

**ROCK YOUR VIEW**

A great offer to join us on the inaugural season of Anthem of the Seas.

- FREE UPGRADE - Reserve a Balcony stateroom for the price of an Ocean View.
- 50% REDUCED DEPOSIT- We will cut your deposit in half for all stateroom categories.

When creating or editing a promotion from the **Promotions|My Promotions** screen, notice the fields *Image File Path* and *Insert Image*. **Be sure the promotion is saved before you use these fields.**

**Important notes when working with images:** It is recommended that you resize the picture to the size you want before uploading due to different browsers and different email clients using different settings with HTML. There are also size restrictions to make sure that the person receiving the email has the best experience. Emails over 1MG or 650 pixels in height or width are too large and require too much time for the user to download. It will also increase the SPAM score on the email and decrease the chances of getting to the inbox.

**Image File Path:** Click the *Browse* button to the right of this field to select an image file on your computer, then click *Open* to upload it.

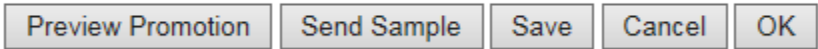


**Available Images:** This is used after the image has been uploaded into the promotion. Place your cursor in the Compose window where the image should be added. Use the drop-down arrow to select an image, then click *Insert Image*.



**Delete Image:** To remove images from the promotion, delete them from the compose screen by clicking the image and using the delete key. To remove an image from the drop down selection of images, select it in the *Available Images* drop-down, then click *Delete Image* to complete the removal.

**Step 8)** Preview Promotion and send a sample of the email.



**Preview Promotion (only active after saving your work):** See a sample of the email you are creating, with the header and footer included.

**Send Sample (only active after saving your work):** - Send yourself a sample of the email.

**Step 9)** Save the Promotion and then order the Promotion.

**Save:** Use this button to save your work in progress without exiting. Once saved, the promotion will be listed on the **Promotions|My Promotions** and **Promotions|My Templates** screens.

**Cancel:** Do not save changes and exit this screen


**OK:** Save changes and exit this screen.



**Order the Promotion:** A promotion can be ordered from the Home page in the *Available Promotions* section or by using the **Promotions**|**My Promotions** menu option.

Supplier Name	Program	Description	Type	Order By	
My Promotions	Custom Promotions	Cruise Alaska	Email	12/29/15	<a href="#">Order</a>
My Promotions	Custom Promotions	New England & Canada cruise getaways	Email	09/28/15	<a href="#">Order</a>
My Promotions	Custom Promotions	Newsletter Promotion - Basic Format	Email	12/29/15	<a href="#">Order</a>
My Promotions	Custom Promotions	October Newsletter	Email	12/29/15	<a href="#">Order</a>
My Promotions	Custom Promotions	One Big World October Newsletter	Email	09/28/15	<a href="#">Order</a>
My Promotions	Custom Promotions	Anniversary Cruise Sale	Email	12/29/15	<a href="#">Order</a>
My Promotions	Custom Promotions	Rock Your View	Email	09/28/15	<a href="#">Order</a>

In both screens, select a promotion and use the *Order* link on the right side of the Description. When you click *Order*, *Best Practices* will appear for your review and then you can continue:



# ClientBase Marketing Services

part of the sabre red portfolio

[Home](#) [My Profile](#) [My Calendar](#) [Promotions](#) [Training](#) [Contact Us](#) [Help](#) [Logout](#)

Order Promotion - Rock Your View

Promotion Period: 09/02/15 To 09/30/15

Travel Period: Unlimited Start Date To Unlimited End Date

Preferred Target Send Date

Sep 17 2015

The default date is two days after today's date

Minimum number of days between sends to a consumer

This is not applicable for this promotion

Email From Address

Lindsay.Chomyn@sabre.com

Notes to CBMS

Order

**Preferred Target Send Date:** Select the date you want to send it. The default is two days from the current date to allow time for syncing your Marketing codes for the list selection.

**Minimum number of days between sends to a customer:** Is not used in Custom Promotions

**Email From Address:** Enter the from email address you want to appear on the Promotion. The default is the from email you have entered under **MyProfile** [|Edit Profile](#)

**Notes to CBMS:** Add any notes or questions you might have for CBMS, and click the "Order" button. You will be prompted to review the Best Practices one last time and save the order.

Creating the order sends the order to the CBMS Operations Team. It will show as *Pending Review*. They will release it for sending and you will see the promotion on your Calendar on the Home page. The email will send on the scheduled send date.

# Chapter 7: Resources

*Below are the resources to access should you need assistance.*

## **ClientBase® Sales Team**

[http://www.trams.com/home/contact/sales\\_representatives/](http://www.trams.com/home/contact/sales_representatives/)

## **ClientBase® CRM Training**

To leverage existing ClientBase product training that is offered by ClientBase® certified trainers, click on one of the links below. You can either attend 'live' webinar sessions or listen to recorded training modules.

[http://www.trams.com/home/training/clientbase\\_webex\\_training](http://www.trams.com/home/training/clientbase_webex_training)

**Live Q&A Sessions for ClientBase Marketing Services:**

<https://cbms.webex.com/mw0306ld/mywebex/default.do?siteurl=cbms&service=6>