

ClientBase



Using ClientBase Online and
VacationPort to Create and Send Emails

This guide will show you how to easily create HTML emails using the **VacationPORT** email tools in **AgentPORT**, and send them to your customers using **ClientBase Online**. You or your agency system administrator can also import email tracking information into **ClientBase Online** client profiles. (Please see the "Importing Tracking Information from VacationPORT into ClientBase Windows" document).

The connection between **AgentPORT** and **ClientBase Online** can now be turned on at any time through your **VacationPORT** Administration site.

Login into **AgentPORT** directly to access the **AgentPORT** email tools.

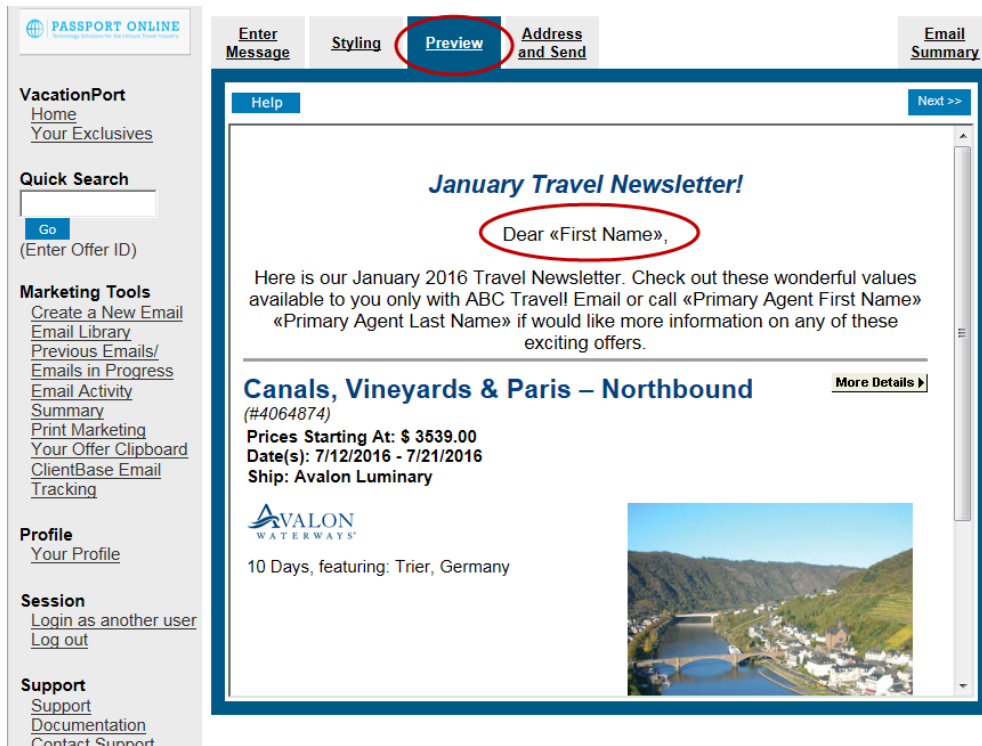
<https://secure.latesttraveloffers.net/apps/portal/Centrallogin.asp?>

Once you are logged into **AgentPORT**, you use the email tools to create your email exactly as you would use them normally. The first change you will notice is in the "**Show ClientBase Tokens**" hyperlink in the "**Enter Message**" section of the email tools. By selecting this hyperlink, a list of available ClientBase merge fields will be available to insert into your email.

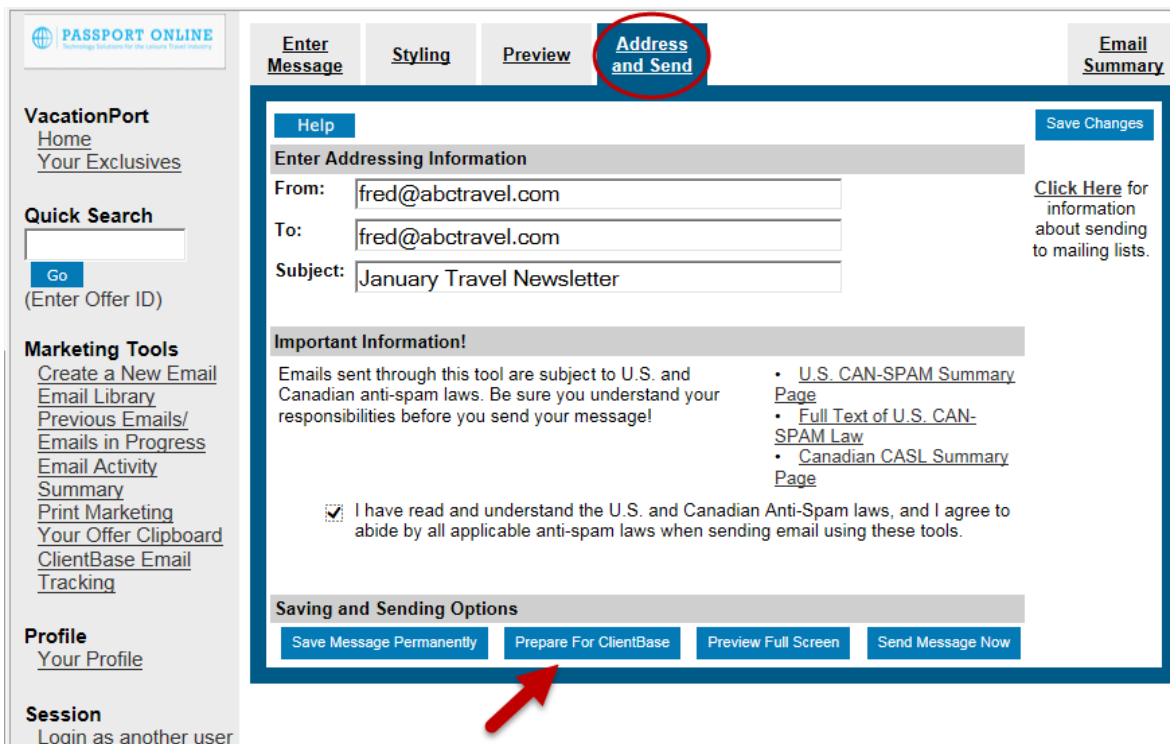
To insert **ClientBase** merge fields, click on a merge field hyperlink such as **<<First Name>>**, then click on the place in the email where you want the merge field inserted and select Paste using the **Ctrl + V** keys or **Right Click + Paste**. You will see the merge fields in the "**Preview**" section of the email tools.

The screenshot displays the 'PASSPORT ONLINE' interface for creating an email. The 'Enter Message' tab is active, showing a form with fields for 'Email Message: January Travel Newsletter!', 'Email Message: Headline:', and 'Email Message: (You can use HTML tags for emphasis)'. The main text area contains a draft email starting with 'Dear <<First Name>>,'. A red arrow points from the '<<First Name>>' token in the draft to the 'Client Base Merge Fields' popup window. The popup window lists various tokens and their descriptions, such as '<<Salutation>>' for Salutation and '<<First Name>>' for Client's First Name. The 'Show Client Base Tokens' link at the bottom of the main form is also circled in red.

Token	Description
<<Salutation>>	Salutation
<<Courtesy Title>>	Courtesy Title
<<Name>>	Client's Name
<<First Name>>	Client's First Name
<<Last Name>>	Client's Last Name
<<Current Date:M/D/YYYY>>	Current Date:M/D/YYYY
<<Current Day Of Week>>	Current Day Of Week
<<Primary Agent Last Name>>	Primary Agent Last Name
<<Primary Agent First Name>>	Primary Agent First Name
<<Primary Agent Courtesy Title>>	Primary Agent Courtesy Title
<<Primary Agent Email>>	Primary Agent Email
<<Primary Agent Phone>>	Primary Agent Phone



Select **Next** and move to **Address and Send**. Here you will notice the **‘Prepare for ClientBase’** button. To import your email into **ClientBase Online**, click this button.



When selecting **‘Prepare for ClientBase’**, your email will be displayed and your email content and formatting will be imported into your computer clipboard. Now you can switch over to **ClientBase Online**, open the email tool, and paste the email body into the **ClientBase** email tool using **Ctrl + V** or **Right Click + Paste**.

Merge to E-Mail

To: kable@earthlink.net
CC:
Subject: January Travel Newsletter
Priority: Normal

Ken and Sue Able
1255 Apple Street
Los Altos, CA 94022
Phone: +1 (650) 988-1222

Mode: HTML

Insert Field: Load Template

Preview

Compose HTML
Font size color
Rich text editor toolbar
HTML code view showing table and image tags

Below illustrates the email that is received by your client. When your client clicks on one of the 'More Details' links in the email, they are taken to your VacationPort consumer view to see information on the full product offer.

Cruise Getaways
January Travel Newsletter
I am excited to send you our January Travel Newsletter packed with exciting vacation offers that are only available with ABC Travel!
7 Nights Western Caribbean Cruise
Starting At: \$ 1198.00 + 118.55 taxes/fees
Ship: Oasis of the Seas
More Details

Creating and sending emails to your clients is easy with **ClientBase Online** and **AgentPort**.

Now you have a powerful tool that will help you effectively leverage email marketing, better understand your client's needs, and increase your sales!

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7 Nights Western Caribbean Cruise

Roundtrip from Fort Lauderdale, Florida [See More Dates](#)



More offers from this supplier ▶

Sailing Date: Aug 27, 2016	from \$1,198.00 (USD)
Through: Sep 03, 2016	Per Person
Book By: Aug 26 2016 7:00PM	+ \$118.55 taxes/fees
# of Nights: 7	Interior - Cat. Q

Ship: Oasis of the Seas
 Line: Royal Caribbean International
 Terms: Terms & Disclaimers
 ID: 4124036

Other Categories Starting At:

Inside	Outside	Balcony	Suite
\$1198.00 Cat: Q	\$1266.00 Cat: I	\$1332.00 Cat: C2	\$2797.00 Cat: JS

[View other cabin categories](#)

100 Hour Caribbean Sale (See details)

Overview **Ship Info** Deck Plans Cruise Line

Day	Port	Arrive	Depart	More Information
1	Fort Lauderdale, Florida		4:30 PM	<ul style="list-style-type: none"> Staterooms Celebrations Activities Kids, Teens & Families Food and Drink Shows & Nightlife
2	Cruising			
3	Cozumel, Mexico	7:00 AM	6:00 PM	
4	Cruising			
5	Falmouth, Jamaica	7:00 AM	4:00 PM	
6	Labadee, Haiti	9:30 AM	6:00 PM	
7	Cruising			
8	Fort Lauderdale, Florida	6:15 AM		

Number of Nights: 7

PASSPORT ONLINE
Technology Solutions for the Leisure Travel Industry

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Profile
[Your Profile](#)

Session
[Login as another user](#)
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Support
[Support Documentation](#)
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Technical Help

Please complete the following form to request technical assistance. You will be contacted promptly by support personnel.

First Name

Last Name

E-mail Address

Phone Number

Agency Name (if applicable)

Employer or Affiliation

Date/Time of Problem

E-mail Program Type and Version

Description of Problem

[Reset](#) [Submit Help Request](#)

Support

If you don't find the answers you are looking for in this documentation, you can submit technical support questions using the online support form. After you complete the online help request, click the **Submit Help Request** button, and a support representative will contact you to help resolve any technical issues.