

CLIENTBASE MARKETING & PROMOTIONS

ClientBase Marketing & Promotions	Description	Excel	ClientBase Fields	Parameters
Promo Click Analysis – ResCards ClientResCardRevenueAssClickActivities.rpt Updated Version 1/29/2016	Compares Mailer Promo Clicks with one date range against ResCards with Reservations for the same profile during a different date range. The intent is to view past bookings for clients who are actively looking at promotions.		ResCard #; Agent Name; # of Promo Clicks; Last Click Date; # of ResCards; Total Revenue (Commissions); Last ResCard Departure Date; Avg Months Between Booking and Departure Also can select detail and see all the Reservations with related suppliers and revenue Sample	Start and End Dates for both Mailers ResCards Opt to see detail or summary by Agent;
Promo Click Analysis - Invoices ClientResCardAssClickActivities.rpt Updated Version 1/29/2016	Compares Mailer Promo Clicks with one date range against ResCards with Reservations for the same profile during a different date range. The intent is to view past bookings for clients who are actively looking at promotions.		ResCard #; Agent Name; # of Promo Clicks; Last Click Date; Total Revenue (Commissions); Last Invoice Departure Date Also can select detail and see all the Invoices with related suppliers and revenue Sample	Start and End Dates for both Mailers ResCards Opt to see detail or summary by Agent;
Promo Mailers Activity Mailers.rpt Updated Version 1/28/2016	List of Mailer Subjects for a selected date range with a count for each.	Yes	Mailer Date Created; Mailer Subject; Count of Mailers Sample	Selects all Mailers for Date Range
Promo Mailers with Resulting Inquiries ActivityMailersandInquiries.rpt Updated Version 1/28/2016	List of all ResCards Created within a specific date range where the same customer was sent a promotion (mailer) during a specified period.	No	Customer Name; ResCard #; Trip Name; ResCard Create Date; ResCard Cycle; Region Sample	Two Date Ranges Mailer Date ResCard Create Date

Promo Mailers with Resulting Cruises/Tour Reservations 309.00 v: ActivityMailersandInquiriesTType.rpt Updated Version 1/28/2016 400.00 v: ActivityMailersandInquiriesTType_4_0.rpt Updated Version 7/15/2016	List of all Cruise and Tour Reservations within a specific date range where the same client was sent a promotion (mailer) during a specified period.		Customer Name; ResCard #; Trip Name; ResCard Create Date; ResCard Cycle; Region Sample	Two Date Ranges Mailer Date ResCard Create Date
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Promo Mailer Analysis – Specific Mailer ID 3.09 v: PromoMailer100.rpt Updated Version 1/29/2016 Formerly 1600PromoMailer100.rpt 4.00 v: PromoMailer100_4_0.rpt Updated Version 7/16/2016	Comprehensive analysis of the Sales and Revenue from ResCards of Profiles during a specified date range where a promotion mailer with a specific Mailer ID was sent to the same Profile.	Yes	Client Name; ResCard #; Marketing Source; Trip Start Date; Destination Separate Analysis of Sales & Revenue by Supplier and by Travel Category. Sample	Date Range for ResCard Create Dates; Select Agency, Group or Individual Agent ID
Marketing Partner ID List Marketing Partner Ids Lists.rpt Updated Version 1/14/2016	List of all Marketing Codes within Marketing Categories in the database. Includes the Marketing Partner ID, if one is associated with the Code. Important to have Marketing Partner Ids for marketing purposes. Marketing Partner IDs are created at request of Consortia	Yes	Marketing Category; Marketing Code; Marketing Partner Id Sample	Automatically selects all Marketing Codes in database
Source of Business by Supplier 3.09 v: Source of business report by supplier.rpt Updated Version 3/7/2016 4.00.v: Source of business report by supplier 4_0.rpt Updated Version 7/15/2016	List of Suppliers within Marketing Sources	No	Supplier; Marketing Source; Sales; Revenue (Commissions); Total Passengers Sample	To and From Dates: for ResCard Create: Reservation: Trip Start Dates: ALL or 1 Supplier

<p>U.S. Zip Codes US Zip Codes.rpt Updated Version 1/20/2016</p>	<p>Count of Leisure Active Profiles by U.S 5 digit code. List is sorted by largest number first. Drill down (double click) on a line to see a list of the profiles in that zip code.</p>	<p>Yes</p>	<p>5 Digit Zip Code; Total Count; Count of Zip Code; Percent of Total Drill Down – Zip Code; Profile #; Profile Name; Full Zip Code Sample</p>	<p>None: Automatically Pulls Active Leisure Profiles with first 5 digits of Zip Code</p>
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<p>Promo Click ResCard Analysis 3.09 v: PromoClickResCardComparison.rpt Updated version 06/23/2016 4.00 v: PromoClickResCardComparison_4_0.rpt Updated version 06/19/2019</p>	<p>Finds all the Promo Click Mailers for a specific period and then searches for ResCards within a separate specified date range for the same Client. Compares dates and highlights in Blue and accounts where there has been no ResCard created within a year after the last Promo Click. If the difference is more than one year the date displays in Red. The total Revenue, number of Clicks, number of ResCards and the average number of months between booking and trip start date are displayed.</p>	<p>No</p>	<p>Profile #, Client Name, Primary Agent Name, Number of Clicks, Last Promo Click date, Revenue, Last Date ResCard Trip Started, Number of ResCards, Avg Months between ResCard Create Date and Trip Start Date. Sample</p>	<p>Date Range for Promo Click Mailer Records Date Range for ResCards using Trip Start Date Display Option See Detail or Summary for each Client.</p>