

ClientBase Marketing Services FAQ's

How do I update my agency address, phone number or other information?

• Log into <u>www.clientbasemarketing.com</u>, click on My Profile, Edit Profile, make the applicable updates, then click on Update Profile.

What do I need to do if I receive an opt-out notification email?

 You would do a Level 1 query by email address in ClientBase to find the profile, and uncheck the Marketing Permission box on the email address.
<u>Click here</u> for more information.

I have a client that clicked the unsubscribe link in error. How do I add them back to my email list?

• You can send an email to <u>Trams.CBMSsupport@sabre.com</u> with the client's email address and we will remove it from the internal opt out list on the Trams side.

How do I add/review my Primary Suppliers?

• Log into <u>www.clientbasemarketing.com</u>, click on My Profile, Primary Suppliers, check the suppliers you wish to be automatically opted in on. Then click Update Primary Suppliers. As the email promotions become available on your Primary Suppliers, they will be added to your Marketing Calendar and sent out automatically for you.

How do I upload/change my Agency Logo?

 Log into <u>www.clientbasemarketing.com</u>, click on My Profile, Upload Logo, click Add Logo, browse to where your logo is located on your computer, then Save. The maximum size is 500 pixels wide.

How can I see what promotions are scheduled to be sent out for me?

• Log into <u>www.clientbasemarketing.com</u>. You can see your Marketing Calendar on the Home page. You can also click at the top on My Calendar. Any items on your Marketing Calendar will be sent out automatically for you on the scheduled date.

How do I opt out of an email promotion?

 There are two ways to opt out of an email promotion. You will be sent a Promotion Preview email a few days prior to the email promotion getting sent out. The Preview email will have a link to cancel or edit the order. Click that link and then choose the Cancel option. You can also log into <u>www.clientbasemarketing.com</u>, from the Home or My Calendar page there will be an 'opt out' link next to the promotion. If you click the 'opt out' link, the email promotion will not be sent out for you. Once the order has been created, the 'opt out' link becomes an 'edit' link that you can click on if you wish to cancel the order.

How can I see which promotions have been sent out for my agency?

• Log into <u>www.clientbasemarketing.com</u>, click on Promotions, Promotion History. This will display the Subject of the promotion, how many emails were sent, how many emails were opened, your open rate percentage, and how many recipients clicked in the emails for more information

How can I see which clients have been sent the email promotions in ClientBase Windows?

When a client has been sent, has opened or clicked the links within an email promotion, their profile in ClientBase is updated with a mailer activity beginning with the Subject of 'Promo sent', 'Promo open', or 'Promo Click'.
<u>Click here</u> for query instructions.
<u>Click here</u> to watch to a recorded WebEx.

How can I see which clients have been sent the email promotions in ClientBase Online?

When a client has been sent, has opened or clicked the links within an email promotion, their profile in ClientBase is updated with a mailer activity beginning with the Subject of 'Promo sent', 'Promo open', or 'Promo Click'.
Click here for query instructions.

Click here to watch a recorded WebEx.

How can I see how many marketable profiles I have in ClientBase?

 The basic information profiles need to have to be included in the email marketing promotions are that they have an email address with marketing permission checked yes and at minimum a 2 letter state code in the address field. <u>Click here</u> for query instructions. For the targeted supplier email promotions, you would need to have the client's travel preferences checked on the Marketing tab in ClientBase. The more Marketing Codes you have checked, the more promotions your client will qualify for. <u>Click here</u> for more information.

How can I select my own email list for the supplier promotions?

 You can log into <u>www.clientbasemarketing.com</u>, click on the promotion to obtain the unique Marketing Partner ID for that promotion, go into ClientBase and click on Global Defaults, Profile Defaults, Marketing Codes, click Add, select the Marketing Category you wish to add it in, Name the Marketing Code and input the Marketing Partner ID. Then do the query for the profiles you wish to have the email promotion sent to, and do a Global Modify to add the Marketing Code to those profiles you selected. You can also right click in your query results, choose 'Select All', then 'Add Marketing Code', check the Marketing Code you wish to add, then click OK.

<u>Click here</u> for further instructions.

<u>Click here</u> to listen to a recorded WebEx.

What do I do if my ClientBase synchronization is out of date?

CBMS cannot send emails on your behalf until your CB sync is current. You can either email the Sync Dept at <u>Trams.Sync@sabre.com</u> or for immediate assistance; you can join a live Sync WebEx Session using this link: <u>http://www.trams.com/home/support/livesyncsupport/</u>. Be sure to initiate the support session from the computer where the sync scheduled task is located so that they can immediately look at your sync issue.