

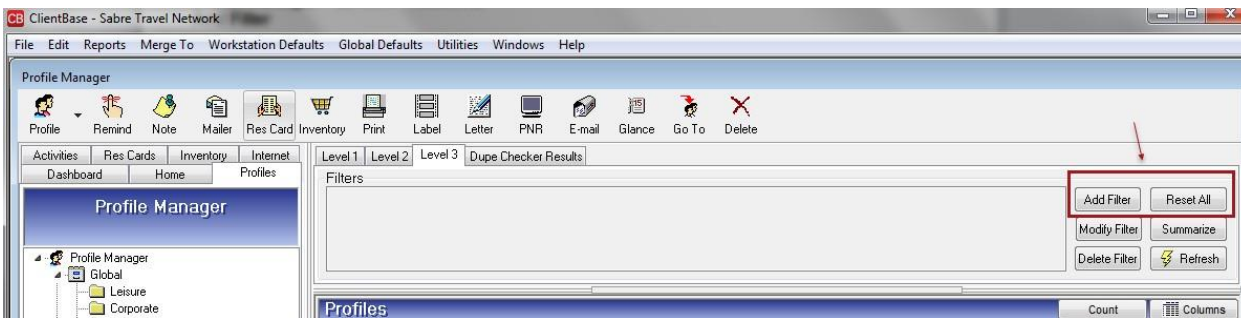
Display which clients actually clicked within a promotion for more information in ClientBase Windows and ClientBase Online

## ClientBase Windows

### Query for Promo Clicks within the Last 14 Days

From the Profile Manager – choose the Level 3 query tab

- Click Reset All – Reset all level 3 filters? – Select Yes
- Click on Add Filter



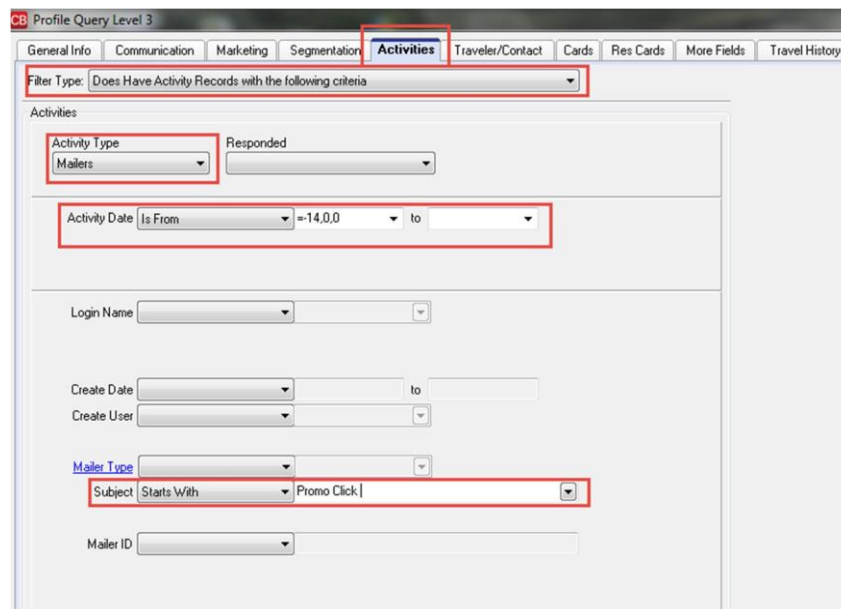
### Activities Tab

- Filter Type – Does Have Activity Records with the following criteria Activity Type
- Mailers Activity Date
- From =-14,0,0 (you can change 14 to however many days you wish to check from)

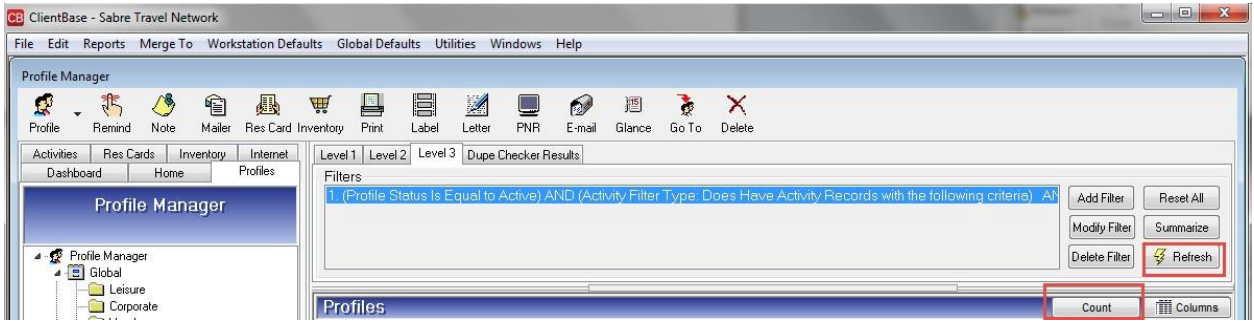
### Subject

- Starts With – Promo Click
- You can replace Promo Click with Promo sent and Promo open to see who was sent and who opened your email promotions.

### Click OK

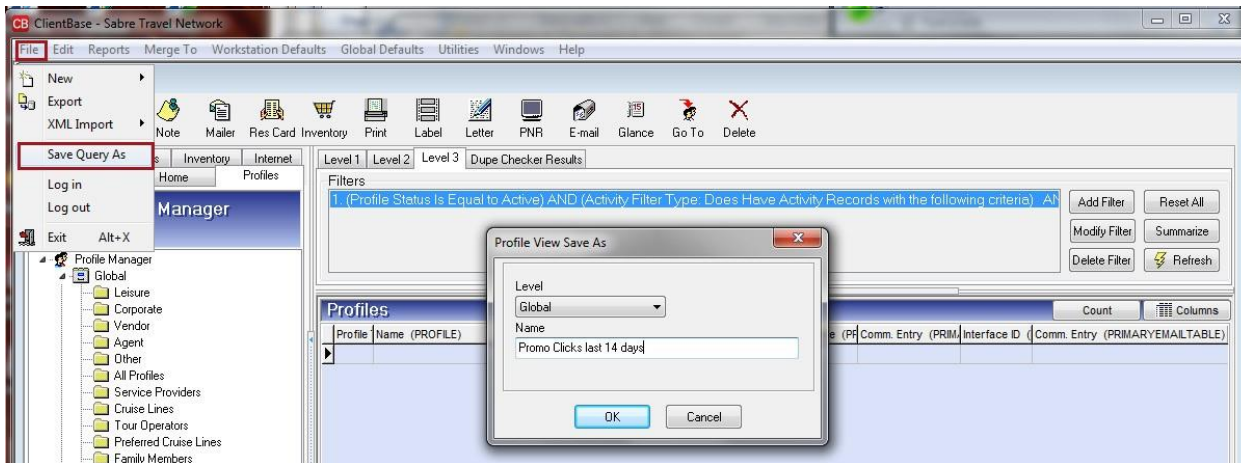


- Refresh
- Count



You can then save this Query as a Global Query Folder to always display the Promo Clicks from the last 14 days every time you open it.

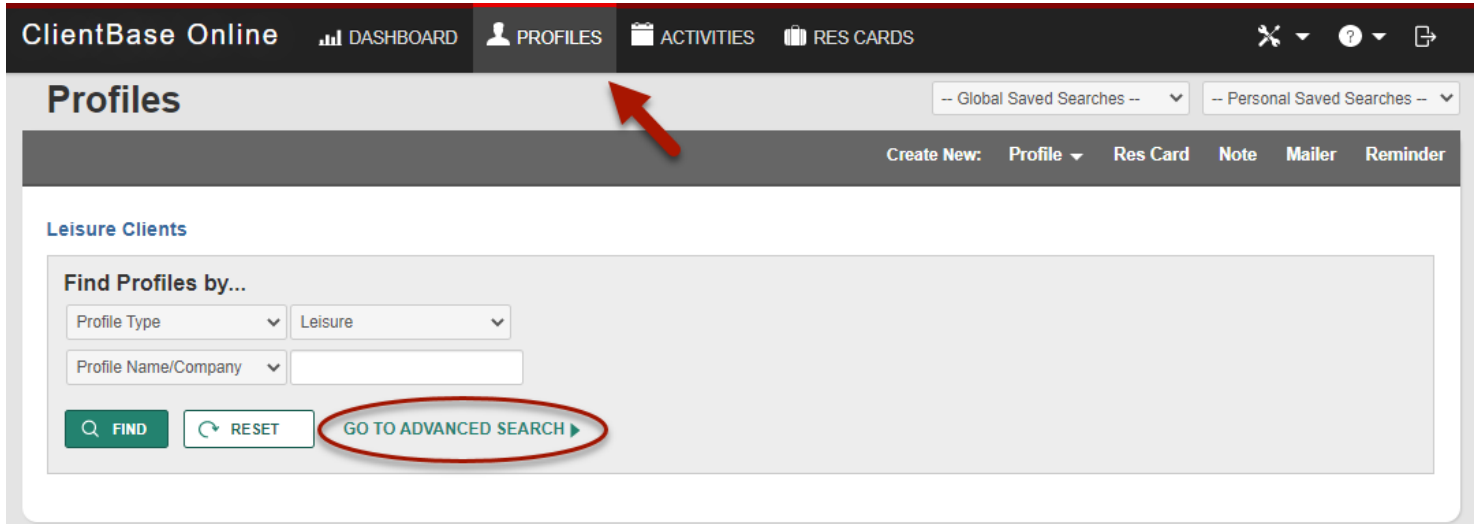
- File
- Save Query As
- Global
- Name- Promo Clicks last 14 days



# ClientBase Online

## Search for Promo Clicks within the Last 14 Days

- Sign into ClientBase Online
- **From the Profile Manager** - Click *Go to Advanced Search*



The screenshot shows the ClientBase Online interface. At the top, there is a navigation bar with tabs for DASHBOARD, PROFILES, ACTIVITIES, and RES CARDS. The 'PROFILES' tab is highlighted, and a red arrow points to it. Below the navigation bar, the 'Profiles' section is visible. On the right side of this section, there are two dropdown menus: '-- Global Saved Searches --' and '-- Personal Saved Searches --'. Below these, there is a 'Create New:' section with options for Profile, Res Card, Note, Mailer, and Reminder. The main content area is titled 'Leisure Clients' and contains a search form. The form has a 'Find Profiles by...' section with two dropdown menus: 'Profile Type' (set to 'Leisure') and 'Profile Name/Company'. Below the dropdowns are three buttons: 'FIND', 'RESET', and 'GO TO ADVANCED SEARCH'. The 'GO TO ADVANCED SEARCH' button is circled in red.

- Click Activities
- Put a check mark next to *Mailer*
- Activity date leave the from blank
- Activity date through - =-14,0,0
- Subject - *Promo sent* or *Promo open* or *Promo click*.
  - You can also Search for which clients opened the survey and which clients completed the survey. Instead of typing "Promo click" enter *Survey open* or *Survey completed*
- Click *OK*

**ClientBase Online** DASHBOARD PROFILES ACTIVITIES RES CARDS

General Info  
Marketing Codes  
**Activities**  
Traveler/Contact  
Res Card  
More Fields  
Travel History

**Activity Type**

Reminder  
 Note  
 Mailer

Completed/Responded  
[Dropdown]

**Activity Date**

From [Date Picker] through [Date Picker] =-14,0,0

To Do (Timeless)

Duration From [Dropdown]  
Duration To [Dropdown]

**Activity Details**

Login Name [Text] Create User [Text]

Priority [Dropdown]

Private

Reminder Type [Text] --Reminder Type-- [Dropdown]

Mailer Type [Text] --Mailer Type-- [Dropdown]

Mailer ID [Text]

Create From [Date Picker] through [Date Picker]

Subject [Text] Promo Click [Dropdown] --Subject-- [Dropdown]

Alarm Set

**OK** **< CANCEL** **↻ RESET**

- Click **Saved Searches**

Merge Options Create New: Profile Res Card Note Mailer Reminder Reports

**Find Profiles by...**

\*\*\* General Info \_\_\_\_\_  
Profile Status Is Equal to Active

\*\*\* Activities \_\_\_\_\_  
Mailers

ENTER DATA TO SEARCH BY BACK TO SIMPLE SEARCH ▶

✓ COUNT First | Previous | Next | Select Columns | Sort by Columns | **Saved Searches**

View ⚙ L	Able Jr/Kenneth	4195553152	Fargo	ND	48312	+1 (419) 555-3152
View ⚙ L	Bates/Jason	5865554696	Detroit	MI	481311	+1 (586) 555-4696

- Save Current

**Profiles** -- Global Saved Searches -- -- Personal Saved Searches --

- Global
- Name- Promo Clicks last 14 days
- OK

**Profiles** -- Global Saved Searches -- -- Personal Saved Searches --

**Profile View Save As**