

ClientBase



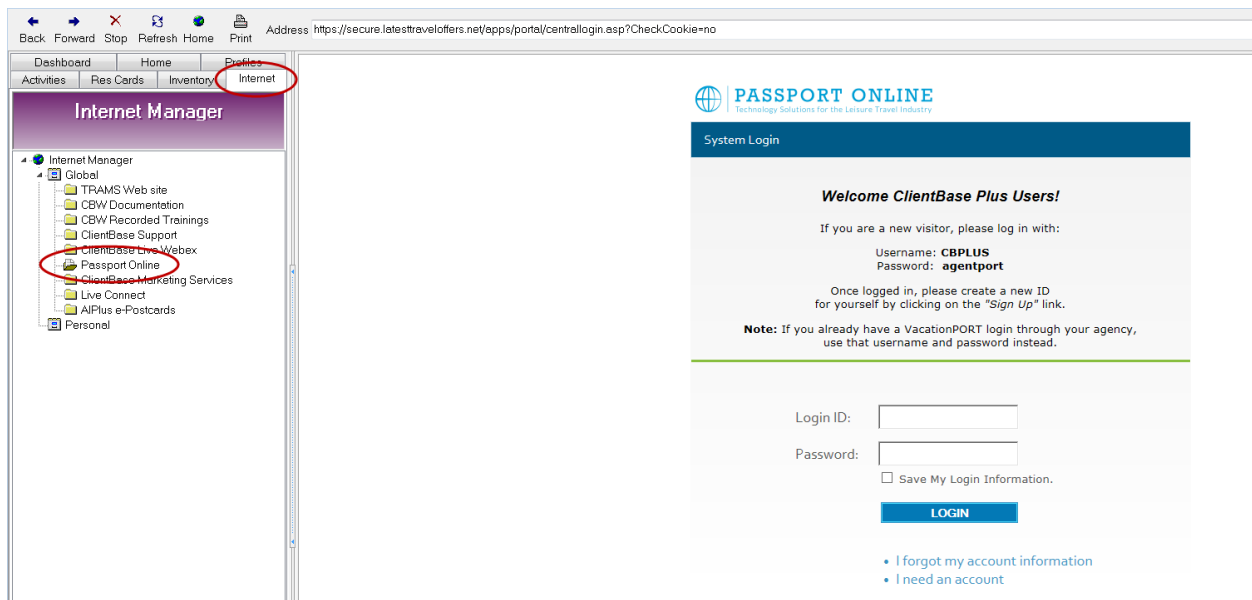
Using ClientBase Windows and
VacationPort to Create and Send Emails

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 Windows**. You or your agency system administrator can also import email tracking information into **ClientBase Windows** client profiles. (Please see the “Importing Tracking Information from VacationPORT into ClientBase Windows” document).

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

Accessing the **AgentPORT** email tools can be done in one of two ways:

- Log into **AgentPORT** directly, or
- Log into **AgentPORT** through the **ClientBase Windows** Internet Manager



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.

Client Base Merge Fields

When preparing emails for Client Base, merge fields can be embedded which will be converted during the mail merge. Below is a list of the available merge fields that can be inserted. Click on the merge field you would like to use, then close this window and paste the merge field into your email message using CTRL-V.

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

Preview

January Travel Newsletter!

Dear «First Name»,

Here is our January 2016 Travel Newsletter. Check out these wonderful values available to you only with ABC Travel! Email or call «Primary Agent First Name» «Primary Agent Last Name» if would like more information on any of these exciting offers.

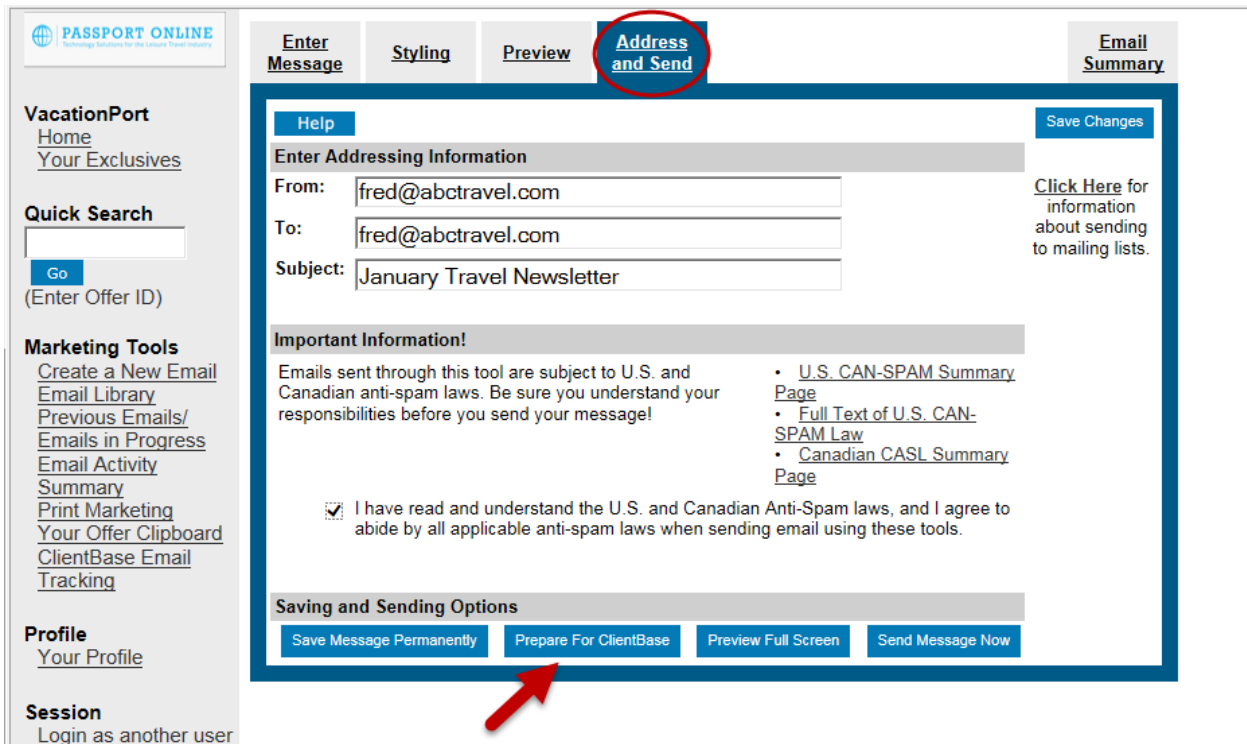
Canals, Vineyards & Paris – Northbound [More Details »](#)

(#4064874)
Prices Starting At: \$ 3539.00
Date(s): 7/12/2016 - 7/21/2016
Ship: Avalon Luminary

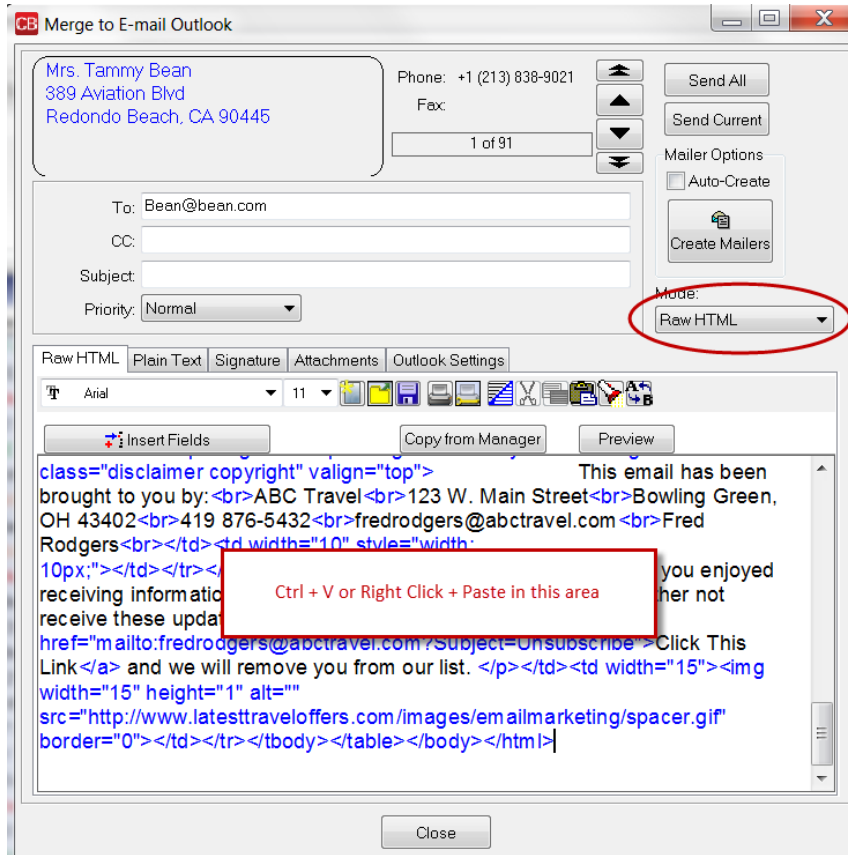
AVALON WATERWAYS

10 Days, featuring: Trier, Germany

Select **Next** and move to **Address and Send**. Here you will notice the **'Prepare for ClientBase'** button. To import your email into **ClientBase Windows**, 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 Windows**, open the email tool, and paste the email body into the **ClientBase** email tool using **Ctrl + V** or **Right Click + Paste**.



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.



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! Email or call Beth Vollmar if you are interested in any of these exclusive travel offers!

7 Nights Western Caribbean Cruise



Starting At: \$ 1198.00
+ 118.55 taxes/fees
Ship: Oasis of the Seas

More Details ▶

7 Nights Western Caribbean Cruise
Roundtrip from Fort Lauderdale, Florida [See More Dates](#)

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

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)

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

Creating and sending emails to your clients is easy with **ClientBase Windows** 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!

Technical Help

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

VacationPort
[Home](#)
[Your Exclusives](#)

Quick Search

(Enter Offer ID)

Marketing Tools
[Create a New Email](#)
[Email Library](#)
[Previous Emails/](#)
[Emails in Progress](#)
[Email Activity Summary](#)
[Print Marketing](#)
[Your Offer Clipboard](#)
[ClientBase Email Tracking](#)

Profile
[Your Profile](#)

Session
[Login as another user](#)
[Log out](#)

Support
[Support Documentation](#)
[Contact Support](#)

First Name	<input type="text"/>
Last Name	<input type="text"/>
E-mail Address	<input type="text"/>
Phone Number	<input type="text"/>
Agency Name (if applicable)	<input type="text"/>
Employer or Affiliation	<input type="text"/>
Date/Time of Problem	<input type="text"/>
E-mail Program Type and Version	<input type="text"/>
Description of Problem	<input type="text"/>

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.
