

# PROFILES FOR SIGNATURE SUCCESS

## QUICK REFERENCE GUIDE (CLIENTBASE ONLINE)

### Why use ClientBase and what is it?

Utilizing ClientBase gives you access to Signature's powerful tools including marketing, Emarketing, Cruise Track and Client Reach driving more business and enhancing brand.

ClientBase is a Client Relation Management database program housing not only contact information, but also traveler demographics. It has a trip management tool, time management and even a booking tool (Live Connect) that many of Signature's preferred suppliers participate in, saving you time and effort. The online version is accessible anywhere you have internet connectivity giving you real time access via Internet Explorer.

You know how important it is to maintain a good relationship with your clients, especially if you are a travel professional specializing in leisure travel. You succeed by creating a bond, building trust and by matching the right travel products and services with your customers. Take the next step and delve into this How to Guide Profiles for Signature Success: Profile Productivity Boosters and Time Savers!

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# PROFILES FOR SIGNATURE SUCCESS

## QUICK REFERENCE GUIDE (CLIENTBASE ONLINE)

### SEARCH FIRST:

Before creating a new profile, it is a best practice is to search for an existing profile first to avoid creating duplicates. There are different methods to search for a profile. Enter in 3 to 4 letters of the last name to avoid not finding a profile due to typos. As you type, a drop-down list will appear.

#### 1. Simple query:

Level 1, Profile Type=Leisure, Profile Name/Company = last name.

The screenshot shows the ClientBase Online interface. At the top is a red navigation bar with links: ClientBase Online, Profiles, Activities, Res Cards, Tools, Help, and Log Out. Below this is a grey header with the word 'Profiles' and two dropdown menus for 'Global Saved Searches' and 'Personal Saved Searches'. A dark grey bar contains 'Create New:' followed by links for Profile, Res Card, Note, Mailer, and Reminder. The main content area is titled 'Leisure Clients' and contains a 'Find Profiles by...' section. This section has two rows of search criteria. The first row has 'Profile Type' set to 'Leisure' and a 'Find' button. The second row has 'Profile Name/Company' with an empty text box and a 'Go to Advanced Search' link. A 'Reset' button is also present.

#### 2. Simple query:

Level 1, Profile Type=Leisure, Traveler Name = 3 to 4 letters of last name

This screenshot shows the same ClientBase Online interface as the previous one, but with the 'Traveler/Contact Name' dropdown menu selected in the 'Find Profiles by...' section. The dropdown list shows several suggestions: 'Dailey', 'Dailey/Kelly', 'Dailey/Kelly Lynne', 'Dailey/Me', and 'Dailey/Victoria Rose'. The 'Find' button is still visible.

**TIP:** Use this query if your contact may not be the primary traveler in a profile.

#### 3. Complex query:

Click on [Go to Advanced Search](#) > Profile Type=Leisure, Profile Name =3 to 4 letters of last name, Profile status is Inactive.

**TIP:** By switching the Profile Status to Inactive, you may find an old profile for a past client.

**ClientBase Online** | Profiles | Activities | Res Cards | Tools | Help | Log

Entry:

Description:

**Special Date**

From Month:  Day:  Year:  Type:

Through Month:  Day:  Year:

**User Login**

Profile Create From:  through

Profile Create User:

Profile Modified From:  through

Profile Modified User:

Profile Status:

\*There are other filters to use to query the database; email address, phone, and interface ID to name a few.

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

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

Find Profiles by...

Profile Type:  Leisure:  Find:  Reset:

Profile Name/Company:  Smith/John [Go to Advanced Search](#)

Count | First | Previous | Next | Last | [Select Columns](#) | [Sort by Columns](#) | [Saved Searches](#)

Profile Type	Profile No	Name	First Name	Last Name	Communication Entry	Address Line1	City	Apt/Suite	State	Zip
L	30206748	Smith/John John	Smith			3242 Tamarisk Ln	Corona		CA	928

**Results Area:**  
ability to count, select and sort columns and view profile

View:  L

Profile Record: 30206748

[View](#) [Delete](#) [View Activities](#) [Merge to PNR](#) [Merge to Document](#) [Merge to E-mail](#) [Live Connect](#)  
[New Res Card](#) [New Note](#) [New Mailer](#) [New Reminder](#)

**If a profile exists, use it.** By using an existing profile, it saves time and enhances your relationship with your client. Instead of asking for information a new, verify accuracy of contact information. Seek to add additional marketing codes each time you open a profile.

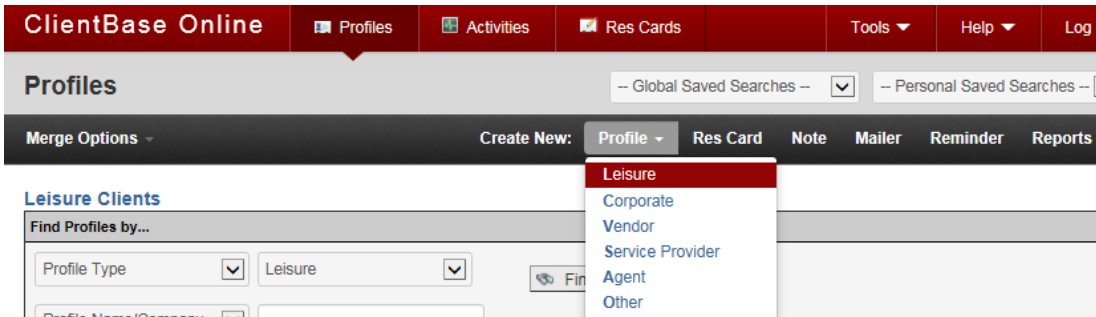
If a profile does not exist, create a new leisure profile.

## CREATE LEISURE PROFILE:

**SIGNATURE SUCCESS TIP:** Create a profile and Res Card for all prospects at time of initial inquiry and follow up. Follow up and follow up to convert to a sale.

**Bonus:** Client Reach can assist you with an auto generated message thanking the prospect for the opportunity and selling them on the benefits of booking with you.

- Click on the Picture Profile icon's down arrow (upper left hand corner)
- Select Leisure



The screenshot shows the 'ClientBase Online' interface. The top navigation bar includes 'Profiles', 'Activities', 'Res Cards', 'Tools', 'Help', and 'Log Out'. The 'Profiles' section is active, and the 'Create New' dropdown menu is open, showing options: 'Leisure', 'Corporate', 'Vendor', 'Service Provider', 'Agent', and 'Other'. The 'Leisure' option is selected. Below the menu, the 'Leisure Clients' section is visible, showing a 'Find Profiles by...' search bar with 'Profile Type' set to 'Leisure'.

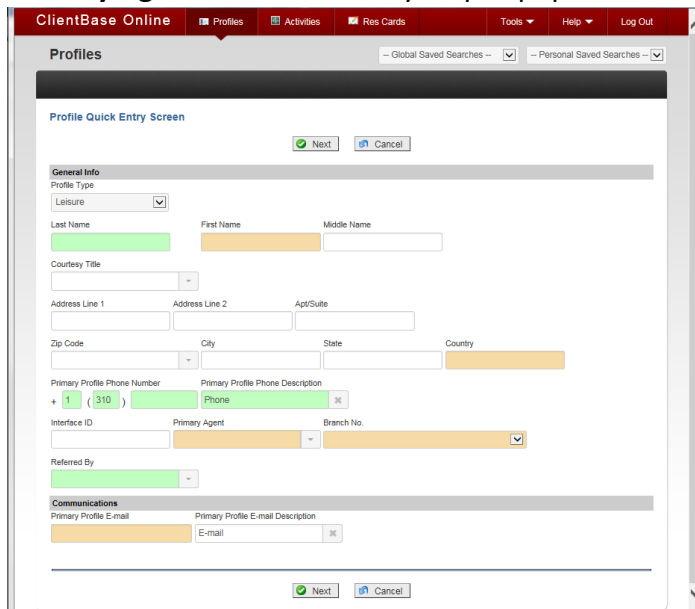
Quick Fill in Form has 2 screens. The first page is the main profile information and the second pertains to the primary traveler.

### Quick Fill in Form: Profile level information

**Interface ID** parameters are set on the agency level. Please check with the owner/manager to determine proper formatting

**Referred By** is how a client first found out about the agency

**Primary Agent** and **Branch** may be pre-populated for you, saving you time and effort



The screenshot shows the 'Profile Quick Entry Screen' in the 'ClientBase Online' interface. The form is divided into sections: 'General Info', 'Communications', and 'Primary Profile'. Fields include 'Last Name', 'First Name', 'Middle Name', 'Address Line 1', 'Address Line 2', 'Apt/Suite', 'Zip Code', 'City', 'State', 'Country', 'Primary Profile Phone Number', 'Primary Profile Phone Description', 'Interface ID', 'Primary Agent', 'Branch No.', 'Referred By', 'Primary Profile E-mail', and 'Primary Profile E-mail Description'. Fields are color-coded: yellow for required and green for optional.

**Your agency may have optional / required fields for leisure profiles. If it is a required field, it will appear as yellow /orange. If it is an optional field, it will be green.**

## Quick Fill in Form 2<sup>nd</sup> page: Primary Traveler information

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

**Profile Quick Entry Screen**

Back Save Cancel

**Primary Traveler**

Last Name First Name Middle Name Courtesy Title

Dailey Kelly

Primary Phone Number Primary Phone Description

+ 1 ( 310 ) Phone

Primary E-mail Primary E-mail Description

E-mail

Gender Citizenship

Birth Date

Back Save Cancel

**TIP:** If the primary email address is required, the requirement may be satisfied by either adding a primary email to the Profile (first screen) or the Primary Traveler (second screen).

**Enter the email address on the Second Screen ONLY.**  
It will automatically transfer into the Pocket Travel Consultant / Axus and still qualify for Emarketing and Client Reach messages. Saving you time and energy!

## LINKING PROFILES

When creating a profile, if the name entered already exists in the database, a pop up screen will appear. Determine if it is the same person. If it is the same person, select the name and click Link at the bottom, if not, hit cancel.

**Profile Quick Entry Screen**

**Link Traveler**

	First Name	Middle Name	Last Name	Primary E-mail	Primary Phone
<input type="radio"/>	Kelly		Dailey	teamdailey3@hotmail.com	
<input type="radio"/>	Kelly	Lynne	Dailey	teamdailey3@hotmail.com	

Link Cancel

**PRODUCTIVITY TIP:** By linking a traveler, the birthdate, passport, frequent flyer and contact information are transferred to the new profile.

## REQUIRED FIELDS FOR SIGNATURE SUCCESS:

- a. Profile designated “**Leisure**”
  - Required for participation in Signature marketing
- b. Profile designated “**Active**”
  - Required for participation in Signature marketing
- c. **Agent** assigned in profile (agent is matched in SigNet)
  - Required for participation in Signature’s Marketing programs and Client Reach
  - Additional benefit is that marketing will be customize with your personal call to action
- d. **Branch** assigned in profile (branch is matched in SigNet)
  - Required for participation in Signature’s Marketing programs and Client Reach
  - Additional benefit is that marketing will be customize to branding at branch level
- e. Valid **Country Code** (US or USA) [All Valid Country Codes](#)
  - Required for participation in Signature’s Marketing programs
  - Country code must be two letters, together with all Caps
  - If you spell out Mexico, the profile will not qualify for marketing - instead use MX

The screenshot shows the 'ClientBase Online' interface. The top navigation bar includes 'Profiles', 'Activities', 'Res Cards', 'Tools', 'Help', and 'Log Out'. The 'Profiles' section is active, showing a list of profiles. The profile for 'Kelly Dailey' is selected, and its details are displayed. The profile is designated as 'Leisure' and 'Active'. The country code 'US' is highlighted. The primary agent is Alisa Prestie, and the branch is 0 - ABC Travel. The profile status is 'Active'.

General Info	
Profile Type: Leisure	Marketing Codes: 47
Profile Name: Dailey/Kelly	Primary Traveler: Dailey/Kelly
Name: Kelly Dailey	Groups:
Additional Name:	Primary Agent: Alisa Prestie
Address	Created: 1/10/17
29027 Nottingham Ct.	Salutation:
US	Interface ID:
Additional Info	Profile No.: 40303867
Interface ID:	Web ID:
Branch: 0 - ABC Travel	Web Password:
Primary Agent: Alisa Prestie	Referred By:
Special Dates	Salutation:
No Special Dates:	Profile Status
	Profile Status: Active
	Create User: signatureapi
	Create Date: 1/10/17
	Last Modified By: SYSDBA
	Last Modified On: 3/22/17 12:22 PM

## WHICH EMAIL ENTERS THE EMARKETING CENTER (EMC)?

When all the above requirements are met, SigNet looks for the first email it can find in this order:

1. Profile’s primary email
2. Primary travelers’ primary email

Once an email is found (regardless of marketing permission), it enters the EMC. If the email does not have marketing permission, it will not get Emarketing but it still qualifies for Client Reach messaging.

**Please note:** Emails that reflect a position in a company don’t enter the EMC. (ie [support@company.com](mailto:support@company.com))

## ANATOMY OF A PROFILE

The best way to understand where you are in the program is to look in the upper right hand corner under the black bar.

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

Merge Options - Create New: PNR Res Card Live Connect Note Mailer Reminder

**Leisure - Dailey/Kelly** **General Info**

Kelly Dailey 29027 Nottingham Ct. OH 44138 US	6154230056 <a href="mailto:kelly@signaturetravelnetwork.com">kelly@signaturetravelnetwork.com</a>	Marketing Codes: 47 Primary Traveler: Dailey/Kelly Groups:	Primary Agent: Alisa Prestie Created: 1/10/17 Salutation: Interface ID: Profile No.: 40303867
--	--	--	---

Remarks: New puppy (poodle terrier mix) named Lilly - Sept 2016

**More about Dailey/Kelly...**

- General Info**
- Communications
- Remarks
- Marketing Codes
- Travelers
- Activities
- Credit Cards

**General Info** Edit

Profile Type: Leisure  
Profile Name: Dailey/Kelly  
Name: Kelly Dailey  
Additional Name:

**Address** Add

29027 Nottingham Ct.  
OH 44138  
US

Address Type  
Primary, Bill To, Ship To

Edit

## TOOL BAR

The Tool Bar creates new functions for the profile. While you can click on the Res Cards tab and then click new, save time and effort by simply clicking on the Res Card icon up top!

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

Merge Options - Create New: PNR Res Card Live Connect Note Mailer Reminder

## HEADER INFORMATION

A quick glance of pertinent information pertaining to the whole profile. Need to email your client? Simply click on the email address and a new email message is addressed and ready.

**Leisure - Dailey/Kelly** **General Info**

Kelly Dailey 29027 Nottingham Ct. OH 44138 US	6154230056 <a href="mailto:kelly@signaturetravelnetwork.com">kelly@signaturetravelnetwork.com</a>	Marketing Codes: 47 Primary Traveler: Dailey/Kelly Groups:	Primary Agent: Alisa Prestie Created: 1/10/17 Salutation: Interface ID: Profile No.: 40303867
--	--	--	---

## PROFILE INDICATORS

Indicators appear on right of profile if it has any of the following:



Active Res Card indicating travel arrangements are in the works



Previous Travel History



Open reminder alert

### Leisure - Dailey/Kelly

### General Info

Kelly Dailey 29027 Nottingham Ct. OH 44138 US	6154230056 <a href="mailto:kelly@signaturetravelnetwork.com">kelly@signaturetravelnetwork.com</a>	Marketing Codes: 47 Primary Traveler: Dailey/Kelly Groups:	Primary Agent: Alisa Prestie Created: 1/10/17 Salutation: Interface ID: Profile No.: 40303867
--	--	--	---



**TIME SAVER TIP:** Click on icon to go to appropriate tab quickly.

## SAVE OR CANCEL WORK



Save



Cancel

**Save Often!**

## INFORMATION TABS

More about  
Dailey/Kelly...

**General Info**

Communications

Remarks

Marketing Codes

Travelers

Activities

Credit Cards

Loyalty Programs

Res Cards

Travel History

Groups

Attachments

PNR Entries

More Fields

Close Profile

Each leisure profile has tabs to organize information. Within each tab is the ability to modify existing information or create new. Some tabs may have radial buttons to narrow the results. Depending on your rights and abilities within the Client Base program, you may not see all the tabs or have full rights to add, modify or delete. The order of the tabs may appear to move around depending on the size of your profile screen.

Tabs are: General Info, Communications, Marketing, Travelers, Travel History, Res Cards, PNR Entries, Activities, Remarks, Payment History, Attachments, More Fields, Groups, and Res Card Remarks

### a. GENERAL INFORMATION

Most information was already added from the Quick Fill in Form. If you have additional addresses or special dates, please enter them here.



**Leisure - Dailey/Kelly** **General Info**

<b>Kelly Dailey</b> 29027 Nottingham Ct. Cleveland, OH 44138 US	6154230056 <a href="mailto:kelly@signaturetravelnetwork.com">kelly@signaturetravelnetwork.com</a>	Marketing Codes: 47 Primary Traveler: Dailey/Kelly Groups:	Primary Agent: Alisa Prestie Created: 1/10/17 Salutation: Interface ID: Profile No.: 40303867
--	--	--	---

Remarks: New puppy (poodle terrier mix) named Lilly - Sept 2016

**More about Dailey/Kelly...**  
**General Info**  
 Communications  
 Remarks  
 Marketing Codes  
 Travelers  
 Activities  
 Credit Cards  
 Loyalty Programs  
 Res Cards  
 Travel History  
 Groups  
 Attachments  
 PNR Entries  
 More Fields  
 Close Profile

**General Info** Edit  
 Profile Type: Leisure  
 Profile Name: Dailey/Kelly  
 Name: Kelly Dailey  
 Additional Name:  
**Address** Add  
 29027 Nottingham Ct.  
 Cleveland, OH 44138  
 US  
 Address Type: Primary, Bill To, Ship To Edit  
**Additional Info** Edit  
 Interface ID:  
 Branch: 0 - ABC Travel  
 Primary Agent: Alisa Prestie  
 Web ID:  
 Web Password:  
 Referred By:  
 Salutation:  
**Special Dates** Save Cancel  
 Type: Anniversary  
 Date: October 15, 1994  
 Comment:  
**Profile Status**  
 Profile Status: Active  
 Create User: signatureapi  
 Create Date: 1/10/17  
 Last Modified By: SYSDBA  
 Last Modified On: 5/1/17 4:06 PM

## SIGNATURE SUCCESS TIP – CLIENT REACH:

The Primary Traveler will receive an Anniversary message based on the information entered on the Profile General Info, Special Dates.

\*\*\*Enter birthdates on the traveler's tab instead of the special dates field here for Client Reach, Merging to PNR and Live Connect functions.

## b. COMMUNICATIONS

Add all types of communications from home and cell phone numbers to email addresses.

**Signature Success Requirement:** A Valid primary **Email Address** with marketing permission is required for Signature Emarketing.

\*Marketing permission is mandatory for Emarketing clients but not for Client Reach.

**Communications** Add

	Name	Primary Traveler	Marketing Permission	Invalid	Primary	
Phone	Dailey/Kelly	✓	✓	✗	✓	<span>Edit</span>
E-mail	Dailey/Kelly	✓	✓	✗	✓	<span>Edit</span>

Phone: 6154230056  
 E-mail: [kelly@signaturetravelnetwork.com](mailto:kelly@signaturetravelnetwork.com)

**Communication**

Traveler: Morgan/Alisa

Type: E-mail

☒ Primary Entry

alisam@gmail.com

Description: E-mail -Description Sel-

☒ Marketing Permission

Save

Emarketing messages are sent to the **Profile Primary Email** address

If a profile primary email address is not selected or if multiple Primary Emails are listed; the **Primary Traveler's, Primary Email** address will be used.

### c. MARKETING

This is a critical step in building an accurate, effective database to ensure optimal reach of marketing efforts. Seek to find out more about your client and add in at least one new piece of information every time you touch a profile.

- Click appropriate choices
- Can limit the number of email promotions sent by clicking on appropriate selection in marketing parameter category.
- Additional categories can be viewed by scrolling down

**More about Dailey/Kelly...**

General Info  
Communications  
Remarks  
**Marketing Codes**  
Travelers  
Activities  
Credit Cards  
Loyalty Programs  
Res Cards  
Travel History  
Groups  
Attachments  
PNR Entries  
More Fields  
[Close Profile](#)

**Marketing Codes** Save Cancel

**Selected Codes:**

**Trip Budget**  
• Moderate (\$700-\$1500 pp, per trip)

**Cruise Vacation Type**  
• Large Ships  
• Quick Getaways/Short Notice  
• River Cruises  
• Small Ships

**Land Vacation Type**  
• All-Inclusive  
• Quick Getaways/Short Notice  
• Rail

**Activity Interest**  
• Adventure  
• Beach/Sun  
• Family  
• Hiking & Walking  
• Safari  
• Spa  
• Whale Watching

**Destination Interest**

**Client Status**  
☐ Referral ☐ Client ☐ VIP  
☐ Prospect

**Trip Budget**  
☐ Budget (Less than \$700 pp, per trip) ☒ Moderate (\$700-\$1500 pp, per trip) ☐ Premium (\$1500-\$3000 pp, per trip)  
☐ Deluxe (3001-\$5000 pp, per trip) ☐ Luxury (\$5000+ pp, per trip)

**Cruise Vacation Type**  
☒ Large Ships ☒ Quick Getaways/Short Notice ☒ River Cruises  
☒ Small Ships ☐ World Cruises ☐ Upscale Cruising Only

**Land Vacation Type**  
☒ All-Inclusive ☐ Escorted Tours ☐ Custom  
☒ Quick Getaways/Short Notice ☒ Rail ☐ Upscale Land Only

**Marketing Parameters**  
☐ Do not send direct mail ☐ Do not send cruise marketing ☐ Do Not Send Hotel/Tour Marketing

**PRODUCTIVITY TIP:** The marketing codes not only help effectively market to your clients, it also helps you understand their wishes, wants and travel personality at a quick glance.

### d. TRAVELERS

This tab contains everything about a specific traveler from birth date, passport and Global Entry numbers, travel preferences, communications, PNR entries and associated profiles.

More about Dailey/Kelly...

General Info

Communications

Remarks

Marketing Codes

**Travelers**

Activities

Credit Cards

Loyalty Programs

Res Cards

Travel History

Groups

Travelers - Summary

Switch to Detail View

↑ ↓

Search

Add

	Name	Relationship	Primary	Age	Birth Date	Primary Phone	Primary Email	Print
View	Dailey/Kelly		Y	47	06/13/1969	6154230056	kelly@signaturetravelnetwork.com	↑
View	Dailey/Victoria Rose		N	16	12/12/2000			↓

<

>

Expand Results

- Click View then Edit to update primary traveler or
- Click Add to add in a new traveler
  - Use legal names as they appear on passports
  - Add birth dates, passport information, airline preferences
- If a traveler is associated with a different profile, click Search to link (do not add)

### SIGNATURE SUCCESS TIP – CLIENT REACH:

**Passport Expiration:** The Passport Expiration message will be generated based on the information entered in the Traveler, Advanced Traveler Info.

**\*\*\*Bonus Time Saver Tip:** Merging to PNR and Live Connect functions depend on birthdate field. Merging to PNR functions will include TSA information when have gender, citizenship, date of birth. If international, passport information is transferred when filled out completely.

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

---

**Traveler - Dailey/Kelly** **Edit Traveler**

Phone: 6154230056  
 E-mail: [kelly@signaturetravelnetwork.com](mailto:kelly@signaturetravelnetwork.com)

Salutation/Nickname:  
 Relationship to Profile:  
 Age: 47  
 Primary Traveler: Yes

Associated Profiles:  
 Dailey/Kelly

Save Unlink Cancel

**Traveler**

Relationship to Profile Primary Traveler

-Relationship Sel- ☒

Last Name First Name Middle Name Courtesy Title

Dailey Kelly

Gender Citizenship

Female US -Citizenship-

Redress No Known Traveler No Salutation/Nickname

Global Entry/TSA #

**Birth Date**

Date (mm dd, yyyy) Age

June 13 1969 47

**Passports**

Passport Number #1 Expiration Issue Date

123456789 10/15/2026 10/16/2016

Issuing City Issuing Country

US Dept of State -Issuing City Sel- US -Issuing Country Sel-

## e. CREDIT CARDS AND LOYALTY PROGRAMS TABS

Enter all types of cards including credit card, frequent flyer, cruise, car and hotel loyalty programs and other numbers to have at your fingertips.

More about Dailey/Kelly...

General Info

Communications

Remarks

Marketing Codes

Travelers

Activities

Credit Cards

Loyalty Programs

Res Cards

Credit Cards - Summary [Switch to Detail View](#) Add

No Credit Cards

- Select who the card belongs to in Name field
- Select type of card: Credit Cards, Frequent Flyer, Car, Hotel Cruise or Other
- Enter in information, card code and description

## f. TRAVEL HISTORY

At a quick glance, you can understand the full scope of how valuable a client is to the agency. The Travel History will also contain GDS invoiced items if your agency has Trams back office. You have the ability to hide the commission totals should your client be in front of you.

## g. RES CARDS

Res Cards help manage the many details involved in planning a trip for customers. Think Res Card = a Trip. No longer do you have to have filing cabinets or storage centers filled to the brim with current and past trip details, now it is at your fingertips. By using Res Cards fully, you can take advantage of Cruise Track, Client Reach and Pocket Travel Consultant by AXUS.

Res Card No.	Status	Trip Locator	Trip Name	Create Date	Region	Trip Source	Gr
9901840	Active		Spanish Highlights October 201	5/1/17	Europe	Sign Cruise Email promo	

\*Please see [Signature's ClientBase and Res Card Training section](#) on SigNet for additional Res Card training resources.

## h. PNR ENTRIES

Save time and effort with adding in traveler specific PNR entries. No longer do you have to remember that a client needs a wheelchair every time they travel, simply add in the GDS format. When transferring the information to the GDS, it will automatically put the appropriate format into the PNR – ensuring you are attending to every detail.

The screenshot displays the 'PNR Entries' interface. At the top, there is a header bar with the title 'PNR Entries' and an 'Add' button (highlighted with a red box). Below this is a table with columns: Entry, Description, GDS, Always Move, and Display On Screen. The table contains one entry: '3WCHR' with description 'Wheelchair', GDS 'Sabre', and 'Always Move' and 'Display On Screen' both set to 'T'. Below the table is a detailed form for adding a new entry. The form includes a 'GDS' dropdown menu (set to 'Sabre'), a 'Description' text box, and two checked checkboxes: 'Always Move' and 'Display On Screen'. There are also currency symbols (USD, EUR, GBP) and a large 'Entry' text box at the bottom.

## i. ACTIVITIES

**SIGNATURE SUCCESS TIP:** Check this tab each time you communicate with your clients. Use it as an opportunity to reach out to your client and follow up on marketing.

“Hi Sally, did you like the ‘Azamara Club Cruises sailings to Asia’ email that I sent yesterday? When I saw the promotion, I thought of you.” (put in the latest email subject that was sent)

There are three types of Activities:

1. Mailers: Mailers are a record of all marketing – print and email, Client Reach communications and invoices sent to the client.

Mailers are automatically created for the following Signature activities:

- a. Marketing publications
  - b. Marketing direct mail
  - c. Emarketing Campaigns
  - d. Client Reach Communications
2. Notes: Notes are your comments that you had manually on a profile or Res Card.

- Reminders: Reminders are used as a call of action for you. For example, you can create activity reminders to follow up on final documents.

	Type	Activity Date Time	Subject	Priority	Login/Created Name	Create
<a href="#">View</a> <a href="#">Edit</a>	Reminder	5/1/17 4:15 PM	Check for Documents	Medium	SYSDBA	5/1/17 4:15 PM
<a href="#">View</a> <a href="#">Edit</a>	Mailer	2/21/17 10:14 PM	Your Client Was Sent - ABC Travel - HTML.....		SIGNATURE	2/22/17 4:15 PM
<a href="#">View</a> <a href="#">Edit</a>	Mailer	1/10/17 5:25 AM	Signature Emarketing Client Profile Created		SIGNATURE	1/10/17 1:15 PM

## j. REMARKS

Enter miscellaneous information that is not found elsewhere in the program. This area is free flow and is not searchable nor transferable. Once entered, it will appear under the header

**Leisure - Dailey/Kelly**

Kelly Dailey  
29027 Nottingham Ct.  
Cleveland, OH 44138  
US

6154230056  
[kelly@signaturetravelnetwork.com](mailto:kelly@signaturetravelnetwork.com)

Marketing Codes: 47  
Primary Traveler: Dailey/Kelly  
Groups:

Primary Agent: Alisa Prestie  
Created: 1/10/17  
Salutation:  
Interface ID:  
Profile No.: 40303867

**Remarks:** New puppy (poodle terrier mix) named Lilly - Sept 2016

**Remarks**

New puppy (poodle terrier mix) named Lilly - Sept 2016

## k. ATTACHMENTS

Save paper, ensure seamless customer service by attaching vendor confirmations so the entire team can access this information. Never again will you have to scrounge around a coworker's desk to find the needed information.

## l. MORE FIELDS

Each agency may have specific areas to track and report on that are not already in Client Base. This field allows for agency customization. Please check with your agency owner or manager to determine if this is important to your agency.

### **m. GROUPS**

Profiles may be associated with a specific group that has been created by the agency. There is no limit to how many groups one profile may be associated with. This group table is shared with Trams Back Office.

### **n. RES CARD REMARKS**

Whenever an invoice, itinerary, trip proposal, trip statement or receipt is issued for this client, enter profile level Res Card Remarks to print accordingly. This can be done globally for the whole agency or a specific branch.

### **o. PAYMENT HISTORY**

If your agency has Trams Back Office, view actual payment information including dates paid, amounts, check numbers, etc. Agents can now easily discover if a payment has come in from a client or has gone out to a vendor.



## INFORMATION SHARING WITH GDS

### MERGE TO PNR

After selling flights in the GDS, save time and improve accuracy by transferring your Client Base profile to the GDS. No longer do you have to remember GDS formats for name, TSA, credit card, address and the like, with a couple of clicks, your information is in the PNR.

- Search for profile, update information as needed
- Click on the PNR button

The screenshot shows the 'Profiles' section of a software interface. At the top, there are two dropdown menus: 'Global Saved Searches' and 'Personal Saved Searches'. Below these is a navigation bar with several buttons: 'Merge Options', 'Create New: PNR' (which is circled in red), 'Res Card', 'Live Connect', 'Note', 'Mailer', and 'Reminder'. The main content area displays a profile for 'Kelly Dailey' with contact information, a phone number, an email address, and various identifiers. A 'Remarks' field contains the text 'New puppy (poodle terrier mix) named Lilly - Sept 2016'. At the bottom, there are tabs for 'More about' and 'General Info', and an 'Edit' button.

- Merge Options / GDS Selection will pop up
- Select your GDS
- Click Next

The screenshot shows the 'PNR Builder Dailey/Kelly' window. At the top, there is a navigation bar with buttons: 'Merge Options', 'Create New: PNR', 'Res Card', 'Live Connect', 'Note', 'Mailer', and 'Reminder'. The main content area displays the same profile information as the previous screenshot. A 'GDS Selection' dialog box is open, showing a table with columns 'Name', 'Connect To: Clipboard', and 'API'. The table lists five GDS options: Sabre, Amadeus, Apollo, Galileo, and Worldspan. The 'API' column has a yellow button with an eye icon next to it. Below the table, there are 'Cancel' and 'Next' buttons. The 'Next' button is highlighted in yellow.

Name	Connect To: Clipboard	API
Sabre	<input type="radio"/>	<input checked="" type="radio"/>
Amadeus	<input type="radio"/>	<input type="radio"/>
Apollo	<input type="radio"/>	<input type="radio"/>
Galileo	<input type="radio"/>	<input type="radio"/>
Worldspan	<input type="radio"/>	<input type="radio"/>

- Select desired information by clicking on boxes
- Select TSA info to be transferred
- Click Send to PNR in the lower right hand corner
- Toggle to GDS.
- If air, car or hotel only booking finish and invoice in GDS
- If the air car or hotel booking is in conjunction with a cruise or tour, ticket / invoice in GDS then import PNR into Res Card in CB

Res Card Note Mailer Reminder

PNR Builder Dailey/Kelly

PNR Entries

<b>Kelly Dailey</b> 29027 Nottingham Ct. Cleveland, OH 44138 US	6154230056 <a href="mailto:kelly@signaturetravelnetwork.com">kelly@signaturetravelnetwork.com</a>	Marketing Codes: 47 Primary Traveler: Dailey/Kelly Groups:	Primary Agent: Alisa Prestie Created: 1/10/17 Salutation: Interface ID: Profile No.: 40303867
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**Remarks:** New puppy (poodle terrier mix) named Lilly - Sept 2016

Cancel
GDS Selection
Refresh
Preview
Send to PNR

5/KELLY DAILEY\$5/29027 NOTTINGHAM CT\$5/CLEVELAND OH 44138

3WCHR

5.S\*AN

+ Additional Entries

☐

Profile Entries

☐

Wheelchair

☒ 3WCHR

☐

Bill To Address

☒ 5/KELLY DAILEY\$5/29027 NOTTINGHAM CT\$5/CLEVELAND OH 44138

☐

Ship To Address

☐ 5DL-KELLY DAILEY\$5DL-29027 NOTTINGHAM CT\$5DL-CLEVELAND OH 44138

☐

Interface ID

☒ 5.S\*AN

☐

Traveler Entries

☐

Dailey/Kelly

☐ Phone Numbers  
☐ 9-6154230056-  
☐ E-mail Address  
☐ PE+KELLY@SIGNATURETRAVELNETWORK.COM+  
☐ Dailey/Victoria

☐

Branch Entries

☐

Agent Entries

Cancel
Refresh
Preview

Send to PNR

## TSA requirements with Merge to PNR

- First enter name correctly into name field on the Travelers tab
- Enter in gender, date of birth and passport info (if required) – Must include country citizenship
- Click appropriate TSA boxes to merge to GDS


## If GDS shows busy: Click Preview

- Click CRS button
- Select the items to be moved over (as above)
- Click on Preview in lower right hand corner
- Highlight desired information
- Copy and paste into GDS
- 


### PNR Builder Dailey/Kelly

<b>Kelly Dailey</b> 29027 Nottingham Ct. Cleveland, OH 44138 US	6154230056 <a href="mailto:kelly@signaturetravelnetwork.com">kelly@signaturetravelnetwork.com</a>	Marketing Codes: 47 Primary Traveler: Dailey/Kelly Groups:	Primary Agent: Alisa Prestie Created: 1/10/17 Salutation: Interface ID: Profile No.: 40303867	 
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Remarks: New puppy (poodle terrier mix) named Lilly - Sept 2016

 Cancel

 Back

 Send to PNR

### PNR Preview

```
5/KELLY DAILEY$5/29027 NOTTINGHAM CT$5/CLEVELAND OH 44138
3WCHR
-1DAILEY/KELLY
5.S*AN
```

## CLIENTBASE PROFILE CHECKLIST FOR SIGNATURE SUCCESS

- ✓ Always search for an existing profile before creating new
- ✓ Create a Res Card for all prospects at time of initial inquiry
- ✓ Verify contact information
  
- ✓ Profile designated “**Leisure**”
- ✓ Profile designated “**Active**”
- ✓ **Agent** assigned in profile (agent is matched in SigNet)
- ✓ **Branch** assigned in profile (branch is matched in SigNet)
- ✓ Valid two letter **Country Code**
- ✓ Valid Primary **Email Address**
- ✓ Marketing permission checked as “yes”
  
- ✓ Enter birthdates on the traveler’s tab instead of the special dates field on the General Info tab
- ✓ Marketing Codes: Review and update every time you speak with clients
- ✓ Mailers: Review activity tab every time you speak with a client and use it to follow up Signature marketing
- ✓ Activities: Create reminders for yourself such as following up on final documents.
- ✓ Notes: Use these instead of sticky notes
- ✓ Create a Res Card for every booking
- ✓ Accuracy counts. It is easier to do it right the first time.