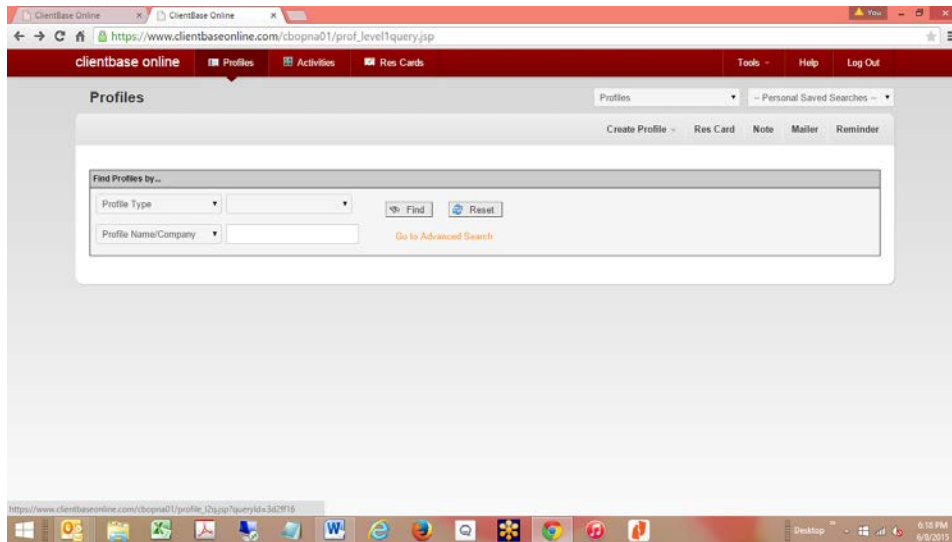


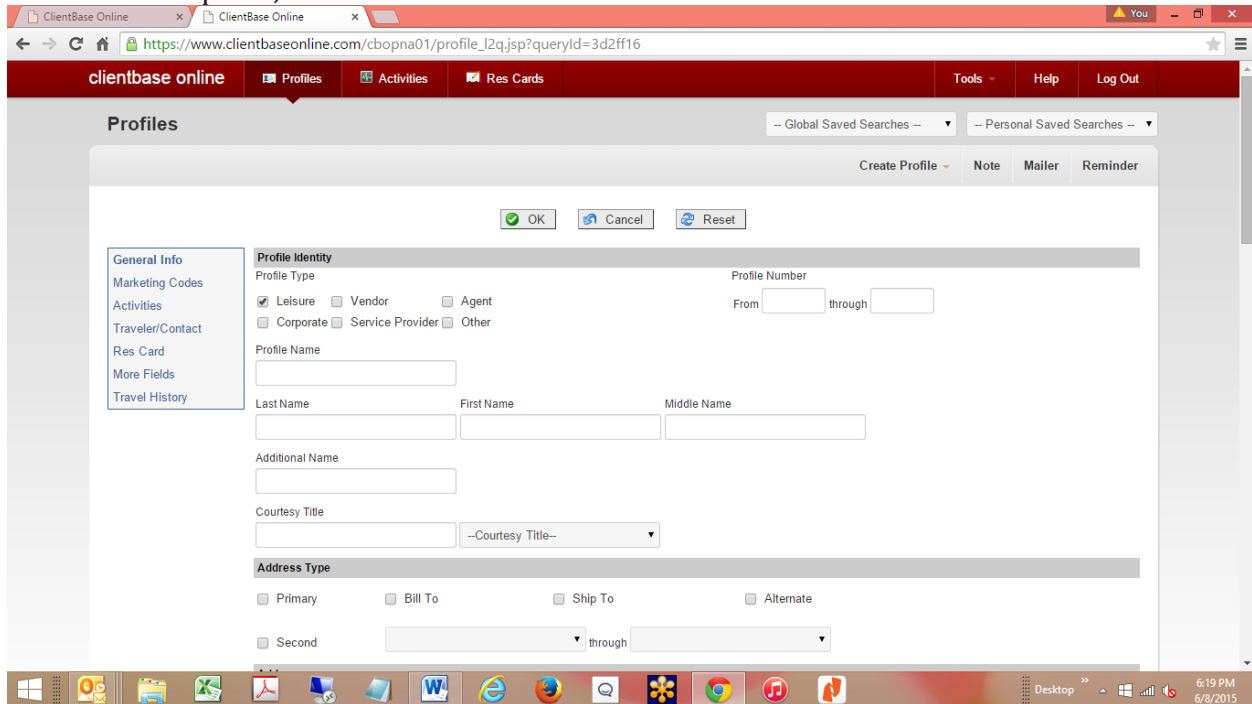
Client Base Online

Open Client Base

Select Advance Search



If there is an option, select Leisure:



Continue down the page selecting your search criteria for your clients.

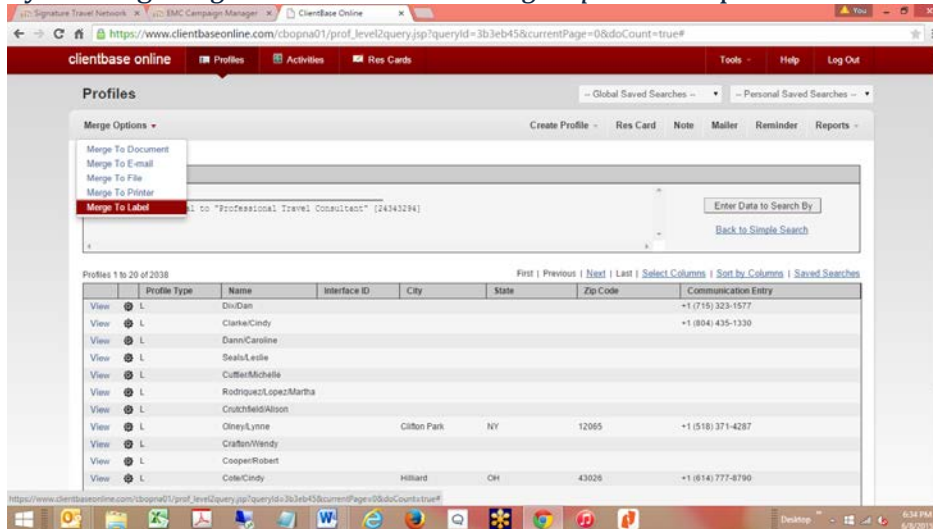
Select OK.

Using Merge to E-Mail

Merge to Email can be launched 1) From the results of a search for multiple profiles using *Simple Search* or *Advanced Search*; or 2) From within a single profile by clicking the action gear next to the client's name in the Profile Manager or within a client profile by clicking *Merge to Email* on the toolbar.

E-Mail addresses are kept in the communication entry area found in the general information link of all types of profiles.

- 1) Using Merge to E-Mail from the results of a search:** When merging information into an email, merge the information to multiple emails from the search results area by clicking *Merge To Email* on the *Merge Options* drop-down.



Merge to E-mail

Include Records:

All Results in Current Manager:

Selected Results in Current Manager:

Sort By: Name

Look for E-mails In: All (Profile and Traveler)

Include Only Primary E-mail

Include Only E-mails with Marketing Permission Checked

A dialog

box appears.

Include Records: Are you emailing for *All Results in the Current Manager* or for *Selected Results in the Current Manager*?

Sort By: Select how emails are to be sorted by selecting *Name, First Name, Last Name, and Email* (default).

Look for E-mails in: Select

****All (Profile and Traveler)** - this option sends to all addresses in the profile that meet the query criteria.

****Profile (If none, then Primary Traveler)** - this option sends to the Profile-level email address, if there is one. If there isn't, then it will use the e-mail address of the Primary Traveler.

****Traveler (If none, then Profile)** - this means that if no Traveler has an e-mail address that meets the query criteria, then e-mail is sent to the Profile address or addresses that meet the criteria.

****Traveler Only** - looks only for traveler e-mail addresses based on matching query criteria. This option merges to all Traveler e-mail addresses that meet the criteria. If there isn't one, then nothing is sent.

Include Only Primary E-mail: This box is checked by default. For any of the above options, if this box is checked, only the Primary E-mail address (either Traveler, Profile, or both, depending on the option chosen) will be sent to. If it's unchecked, then all e-mails, primary or non-primary, that meet the criteria will be used.

Include Only E-Mails with Marketing Permission Checked: This box is checked by default.

2) Using Merge to E-Mail for a single profile: Click the menu bar *Merge Options/Merge To E-mail* inside the client's profile,



or directly from the profile search results screen, by clicking the *Action Gear* located beside the selected profile entry. If more than one email exists within the profile, a grid appears allowing you to select the desired emails you would like to send to.

3) Preparing Emails to Send:

For each email being sent, notice the *Profile Name, Address, Phone and Fax Numbers*. To get to other emails in the series, use the navigation buttons, *First, Previous, Next, and Last*. Any data entered into the first email entry screen appears automatically in the other emails in the series.

To: Includes each individual email address matching your criteria.

Subject: Type the subject of the email. Any email sent **MUST** have a subject.

CC: Enter any email that you want to receive a copy of this email. (Remember, this appears automatically in the other emails in the series.)

Priority: Select a priority label from the drop-down menu of *Highest, High, Normal, Low and Lowest*.

Mode: From the drop-down, select, *Plain Text or HTML*. If you select *HTML*, two tabs appear, one labeled *Compose* and one labeled *HTML*.

Use the Compose tab to type and format your HTML without knowing how to code HTML. A formatting toolbar is included that makes formatting your text, inserting links, pictures and tables very easy. Use the HTML tab if you have Raw HTML that you would like to paste into the email. Anything entered into the Compose tab will then be formatted in raw HTML upon clicking the HTML tab. Anything entered into the HTML tab will then be formatted upon clicking the Compose tab.

Use the Preview button to preview the email message prior to sending. Use the Load Template button to select and load a Document Template set up in

Tools|Settings|Document Templates. Please note that Document Templates have been enhanced to allow formatting in HTML as well, but this formatting is only included when the template is launched via Merge to Email. All Templates launched through the Merge to Doc Template feature are converted to Plain Text upon converting to MS Word.

Insert Field/Load Template: Complete your message by using any of the global document templates setup by the database administrator in the Windows version of *ClientBase*. Use **Load Doc Template** to select from a listing of global templates or use the **Insert Fields** to insert merge fields in combination with free-flow text.

Tip: If you select **Salutation|Courtesy Title Last Name**, or **Salutation|First Name**, or **Salutation|Name** as a merge field, the | character included in the Salutation means that if the Salutation field is not completed within one of the resulting profiles, then for just that profile, you want it to use the merge field following the |. For any of the name field merge fields, if the email is linked to a traveler, then the traveler's name fields will be merged. If the email is not linked to a traveler, then the profile name fields will be merged.

Preview: This option allows you to preview message in its formatted state before sending.

Attachments: Add an attachment to email by clicking *Browse* to locate the attachment, and then *Attach*.

Mailer: To keep a history of any emails sent, be sure to create a *Mailer* record by clicking on the *Mailer* link. These mailers then create a history within each profile whenever an email is sent.

Mail Date/Time: By default, the date and time are auto-filled. These can be changed manually by using the drop-downs.

Subject: Choose a subject for the mailer from the drop-down menu with items setup by the database administrator in the Windows version of *ClientBase*. By choosing from the drop-downs, consistency is assured for reporting and querying purposes.

Body: By default, the mailer retains a copy of the body of the email.

Click *OK* to save.

4) Sent Emails

All emails sent from *ClientBase* create an email job at your SMTP server which can be monitored by clicking the *All Email Jobs* link. This link allows you to monitor jobs that have not yet been completed to view the status. If you want to cancel an email job before it is finished, you can do so by clicking the *Cancel* link next to the job. *Purge Inactive* then deletes any jobs from the listing once they have been cancelled. All email jobs that have completed successfully are automatically be purged from the listing. To return to your email upon viewing this log, click *Done*.