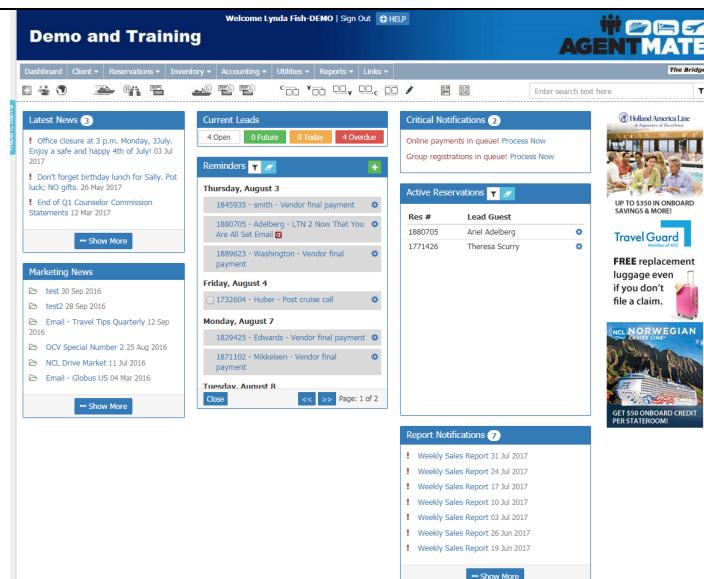


AgentMate & Email Marketing

This document will cover Email Marketing basics and Globally Adding Future Venders To Your Clients.

Step 1: When you first login into AgentMate your brought to the main dashboard.



Welcome Lynda Fish-DEMO | Sign Out | HELP

Demo and Training

Dashboard Client Reservations Inventory Accounting Utilities Reports Links

Enter search text here

Latest News

- Office closure at 3 p.m. Monday, 23rd. Enjoy a safe and happy 4th of July! 03 Jul 2017
- Don't forget birthday lunch for Sally. Pot luck; NO gifts. 26 May 2017
- End of Q1 Counselor Commission Statements 12 Mar 2017

Marketing News

- test 30 Sep 2016
- test2 28 Sep 2016
- Email - Travel Tips Quarterly 12 Sep 2016
- OCV Special Number 2 25 Aug 2016
- NCL Drive Market 11 Jul 2016
- Email - Globus US 04 Mar 2016

Current Leads

4 Open 0 Future 0 Today 4 Overdue

Reminders

Thursday, August 3

- 184935 - smith - Vendor final payment
- 1880705 - Adelberg - LTN 2 Now That You Are All Set Email
- 1880623 - Washington - Vendor final payment

Friday, August 4

- 1723604 - Huber - Post cruise call

Monday, August 7

- 1829425 - Edwards - Vendor final payment
- 1871102 - Mikkelsen - Vendor final payment

Tuesday, August 8

Critical Notifications

Online payments in queue! Process Now
Group registrations in queue! Process Now

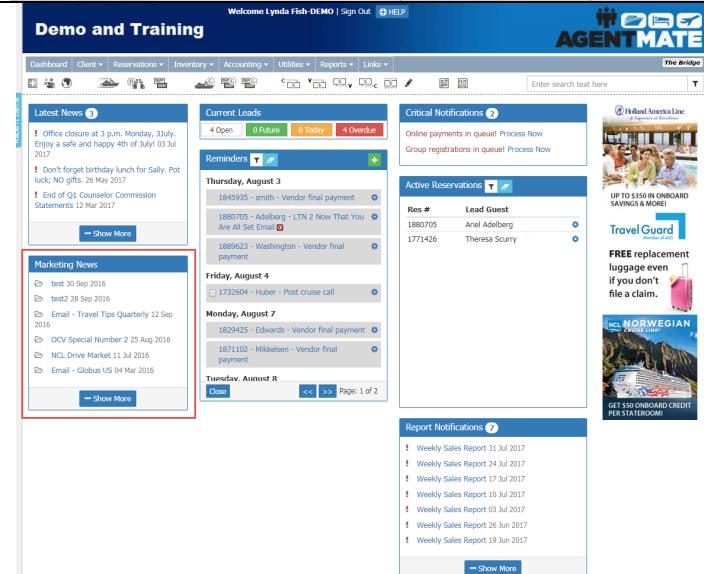
Active Reservations

Res #	Lead Guest
1880705	Ariel Adelberg
1771426	Theresa Scurry

Report Notifications

- Weekly Sales Report 31 Jul 2017
- Weekly Sales Report 24 Jul 2017
- Weekly Sales Report 17 Jul 2017
- Weekly Sales Report 10 Jul 2017
- Weekly Sales Report 03 Jul 2017
- Weekly Sales Report 26 Jun 2017
- Weekly Sales Report 19 Jun 2017

Step 2: Here you can see the recent and upcoming Marketing in the Marketing News Section. Click on Show More to see all the Marketing Details.



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Step 3: The Marketing Details section displays...By Clicking on a specific piece and then the promotional offer you will then be able to see the Booking Instructions you'll need to follow in order to secure that offer for your client. You can also see Promotional Details for that offer.

The screenshot shows the AgentMate interface with the 'Marketing Details' tab selected. On the left, a sidebar lists 'Recent Items' with a 'Last 90 Days' section. The main content area displays a table of recipients with columns for 'Drop Date' and 'Name'. One row is highlighted in blue, labeled with a red circle containing the number '1'. Below this table, another table shows 'Promotion Code' and 'Promotion Name', with 'ENG27758' and 'Royal Caribbean International - WOW SALE' listed. A red circle containing the number '2' is placed over this second table. To the right, there are sections for 'Email Delivery Status' (Delivered: 9411, Open: 1146, Clicked: 57) and 'Promotion Details' which include a promotional offer for 'WOW SALE'.

Step 4: You are also able to view a full list of clients who were selected to receive this piece by clicking on the Recipient List. For email promotions, you will see the full delivery results for each promotion. To see that list, click on any one of the numbers to see the details for that category.

This screenshot is identical to the previous one, showing the 'Marketing Details' page. The 'Recent Items' sidebar and the 'Recipient List' table are visible. The table has a red border around it, indicating it is the active or selected section. The 'Promotion Details' section on the right remains the same.

Step 5: How do you know if you're set up properly in AgentMate for your customers to receive Email Marketing pieces?

There are 3 of key steps that you need to do inside of AgentMate in order to make that happen.

Step 6: #1 Within the Vendor Profile

Tab all the Vendors are pre-checked for Marketing.

To opt out of a Vendor go to Utilities/Agency Defaults/CRM Marketing Defaults/Vendor Profiles.

Uncheck a Vendor Type by *Clicking* on the box next to the vendor, continue this with remaining vendor types and vendors. Press Save to complete the process.

The screenshot shows the 'Vendor Profile' tab selected in the navigation bar. On the left, there is a sidebar with 'Recent Items' and a list of 'Vendor Type' options: < ALL >, Air, Bus, Cancellation Fee, Car Rental, Cruise, Discount, Gift, Hotel, Insurance, Other, Shore Excursion, Tour, Transfer, and Vacation Package. On the right, there is a grid of 'Vendor' names with checkboxes next to them. Some checkboxes are checked, while others are empty. At the bottom right of the grid, there are 'Save' and 'Cancel' buttons.

Step 7: #2 Clients are opted in to receive promotions.

By selecting a Client within your database, you can see from the Summary screen what each client is participating in. *Click* Edit to adjust and view your options.

The screenshot shows the 'Marketing \ Client Profile' screen for 'Stanis Baratheon'. The client's contact information is displayed, including their name, nickname, customer number, and various status fields like 'Client Status: Prospect' and 'Lifetime Value: \$0.00'. Below this, there are sections for 'Relationships' and 'Comments'. On the right side, there is a large panel with detailed personal information such as address, dates, gender, birth date, and passport details. The 'Edit' button is located in the top right corner of this panel. A red arrow points to this 'Edit' button.

Step 8: When you **Click** on the edit button the Edit Client Profile dialog box displays. Here you can see what that client is opted in for

For Engagement Headquarters only, looks at the boxes that are checked by HQ.

We do not look at Agency Direct Mail or Agency Email. Those items are for Agencies to manage their local Marketing.

You must have a valid Mailing address and email address for each client to help ensure delivery of Marketing promotions.

The screenshot shows the 'Edit Client Profile' dialog box with several sections highlighted in yellow. The 'Address Information' section shows an address for Stanis Baratheon. The 'Direct Communications' section has checkboxes for 'Agency Direct Mail' (checked), 'HQ DM - Magazines' (checked), 'HQ DM - Special Offers and Promotions' (checked), and 'Test' (unchecked). The 'Email Communications' section also has checkboxes for 'Agency Email' (checked), 'Customer Experience Email' (checked), 'HQ Email - Inspired Magazine Online' (checked), and 'HQ Email - Postcards Online' (unchecked). Both sections are enclosed in red boxes.

Step 9: The next step is making sure you have Future Vendor Preferences filled out for clients. The Engagement Team focuses on Future Vendor preferences for Email Marketing Promotions.

Each time a new booking is entered in AgentMate the vendors on that booking will populate in the Future Vendor preferences automatically for you.

Once that Reservation travels the vendor will also populate for you in the Past vendor section. BUT again, for Email Marketing the Engagement Team focus on Future Vendor preferences.

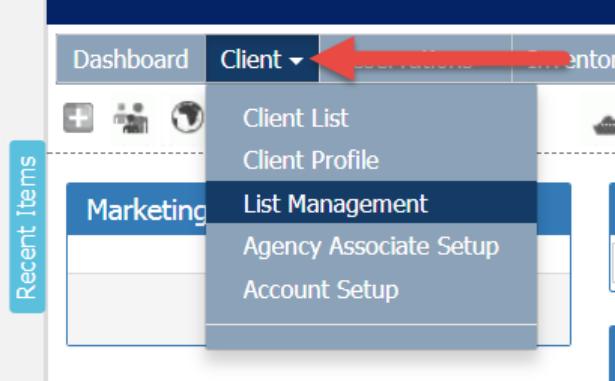
The screenshot shows the 'Client Profile' page for Stanis Baratheon. It displays sections for 'Household' (Head: Stanis Baratheon), 'Relationships' (Past Vendors: A Rosa, A Test; Future Vendors: AAT Group Fees, Advantage Travel Ecuador, Adventure Canada, AGRESSO, Alaska Marine Highway, Alaska Airlines), 'Future Destinations' (Africa, Africa Rivers, Alaska, Amazon River, American Rivers, Art/Theatre, Baseball, Culinary, Culinary/Wine, Family Travel, Football, Golf), and 'Additional Attributes' (Last Minute Travel Cohorts Code, Encode Flag). The 'Marketing' tab is selected. A note at the bottom left says: 'Note: Updates made to this screen will apply to the entire household.'

Step 10: All the different Marketing pieces that have been sent out to this client will show up here under the Communications radio button. You can click Details to see more information.

The screenshot shows the AgentMate software interface. At the top, there's a navigation bar with links like Dashboard, Client, Reservations, Inventory, Accounting, Utilities, Reports, and Links. The main area is titled 'Demo and Training' and shows a client profile for 'Stanis Baratheon'. The 'Marketing' tab is active. Below it, there's a grid for communications, with a red box highlighting the 'Details' button in the bottom right corner. Other tabs in the grid include Communications, Booking History, Adjustments, Reminders, and a date filter (30 Sep 2016). The right side of the screen has sections for Future Vendors, Future Destinations, and Additional Attributes.

Step 11: How do I globally update all my customers to have the future vendors done all at one?

To get started. **Click** on the drop-down arrow on the Client Tab and **Select** List Management from the menu.



Step 12: You're now in the List Management Screen. To get started by default you should already be in the Mail List tab. If not Click on the Mail List Tab.

The screenshot shows the AgentMate software interface with the 'List Management' tab selected. A red arrow points to the 'Mail List' tab. The screen displays various filtering options for the mail list, including Head of Household (Head), Status (Client and Prospect), Counselor, Suppress IC's, Branch (Main Office), Last Name Initial, Accounts, Guest Profile, Group, and Marketing Source (Client).

Step 13: Using the drop-down arrow for Head of Household **Select All** from the list.

Then **Uncheck** the box next to Exclude Currently booked guests.

Next Click Save List

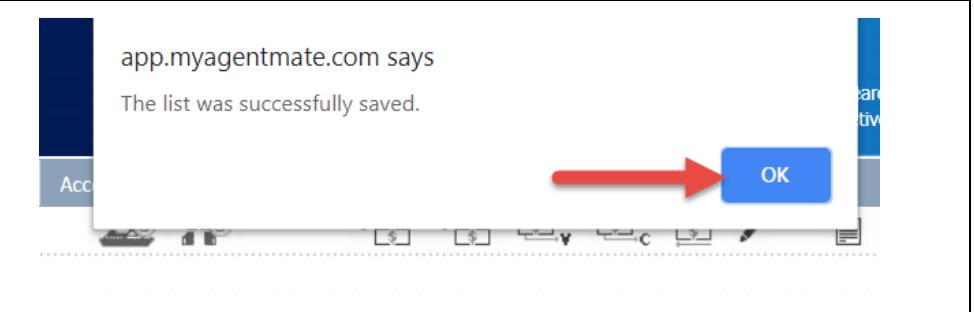
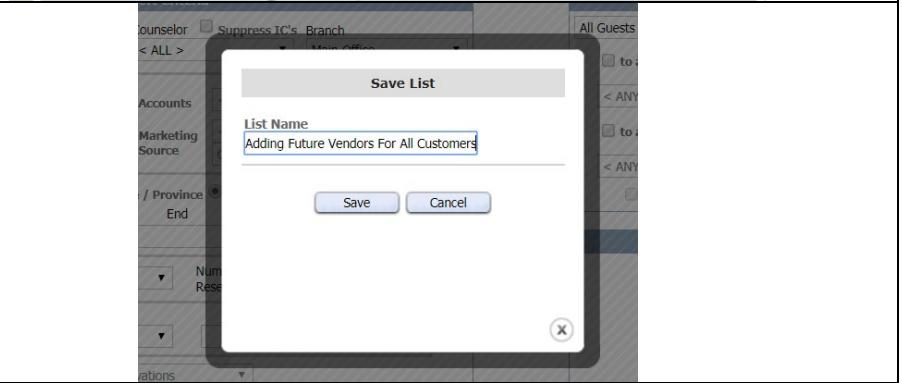
And **Click** Submit

Step 14: After you've clicked submit, you'll be asked to name the list. **Enter** a name that easily identifies what your list is for.

Click Save to continue

Step 15: Click OK

Step 16: Next Click on the List Updates tab.



Step 17: Then Select your list by **Clicking** on it.

The screenshot shows the 'List Management' section of the software. A red arrow points to the 'List Name' column where the list 'Adding Future Vendors For All Customers' is listed. The list is associated with 'Lynda Fish-DEMO' and was created on '28 Jan 2019 10:12 PM'.

Step 18: Your list will expand. Place a **Check** in the box in the header row to select what is shown in the screen.

Next **Click** on the Action arrows.

Your list will expand. **Select** the box in the header row, this will auto select only the first page of the list.

Next **Click** on the Action Arrows

The screenshot shows the expanded list 'Results of list NOT Opted-In Email'. A red circle labeled '1' points to the checkbox in the header row of the table. A red circle labeled '2' points to the 'Actions' button at the bottom left of the list view.

Step 19: In order to get the entire list, **Select** the box "Include customers from all pages"

The using the drop-down arrow for the Value Type Box **Select** Marketing Attribute from the menu

The screenshot shows the expanded list with the 'Include customers from all pages' option selected. A red arrow labeled '1' points to the checked checkbox in the header row. A red arrow labeled '2' points to the dropdown menu under 'Value Type' where 'Marketing Attribute' is selected.

Step 20: This will open additional boxes. Then in the Add/Remove **Select** Add.

Then for Trait **Select** Future Vendor.

Using the drop-down arrow for Value **Select** a Vendor from the list and then **Click** the GREEN plus sign to add it below

The screenshot shows the 'Add/Remove' and 'Trait' selection boxes. A red arrow labeled '1' points to the 'Add' button in the 'Add/Remove' section. A red arrow labeled '2' points to the 'Future Vendor' dropdown in the 'Trait' section. A red arrow points to the green '+' button in the 'Trait' section.

Step 21: In the Value box continue to add as many vendors as you want.

Value Type: Marketing Attribute

Trait: Future Vendor

Value: Royal Caribbean International

Add Remove

Future Vendor Crystal Cruises

Future Vendor Viking Cruises

Apply Cancel

Step 22: Once you've added all the vendors you want **Click Apply**.

Showing 1 to 100 of 491 customers

Actions

Value Type: Marketing Attribute

Trait: Future Vendor

Value: Viking Cruises

Add Remove

Future Vendor Crystal Cruises

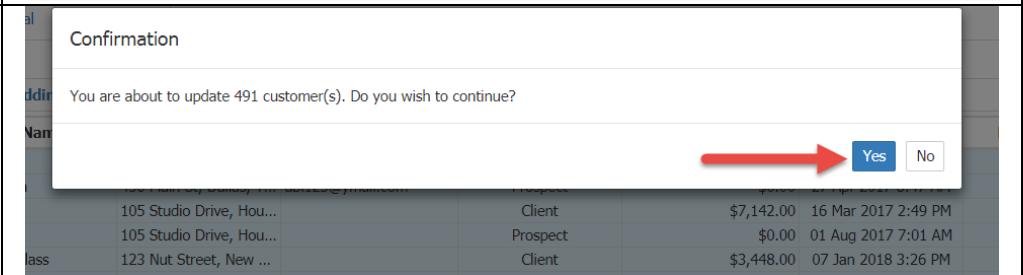
Future Vendor Royal Caribbean International

Future Vendor Viking Cruises

Apply Cancel

Step 23: You'll then see a Confirmation dialog box asking you to confirm your request.

Click Yes to confirm



Step 24: Once it's done applying, you'll receive a message of completion.

