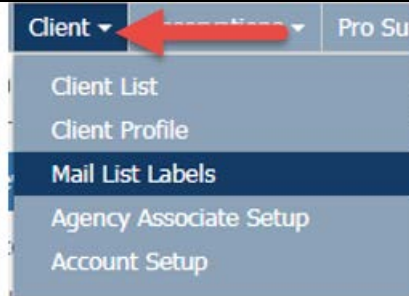


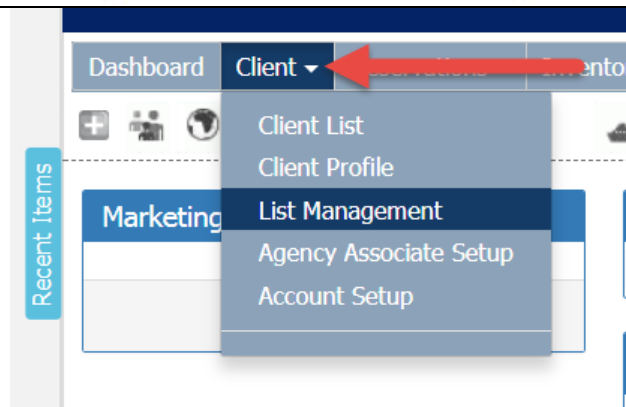


## List Management

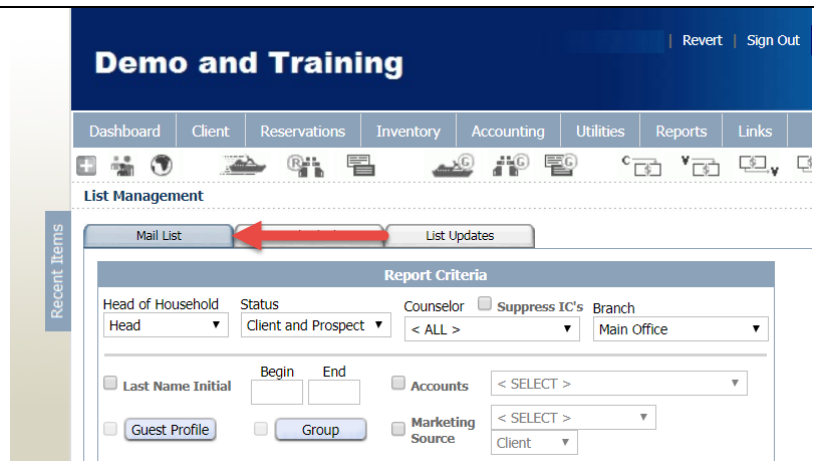
**Step 1:** Mail List Labels has been renamed List Management



**Step 2:** You can access the new List Management the same way you previously accessed Mail List Labels. **Click** on the drop-down arrow on the Client Tab and **Select** List Management from the menu.



**Step 3:** 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.



**Step 4:** For this example, we're going to update any clients in the system that have a Marketing Source of Friends and Family.

**Click** the radio button next to Save List

Then **Click** Submit.

The screenshot shows the 'List Management' interface. A red arrow labeled '1' points to the 'Marketing Source' dropdown menu, which is currently set to 'Friends or Family'. A second red arrow labeled '2' points to the 'Marketing Source' dropdown menu. A third red arrow labeled '3' points to the 'Save List' button in the 'Report Format' section. A fourth red arrow labeled '4' points to the 'Submit' button at the bottom of the page.

**Step 5:** The Save List pop-up box displays. **Enter** in the List Name then **Click** Save.

The screenshot shows a 'Save List' pop-up box. The 'List Name' field contains the text 'Friends and Family'. Below the field are two buttons: 'Save' and 'Cancel'. A red arrow points to the 'Save' button.

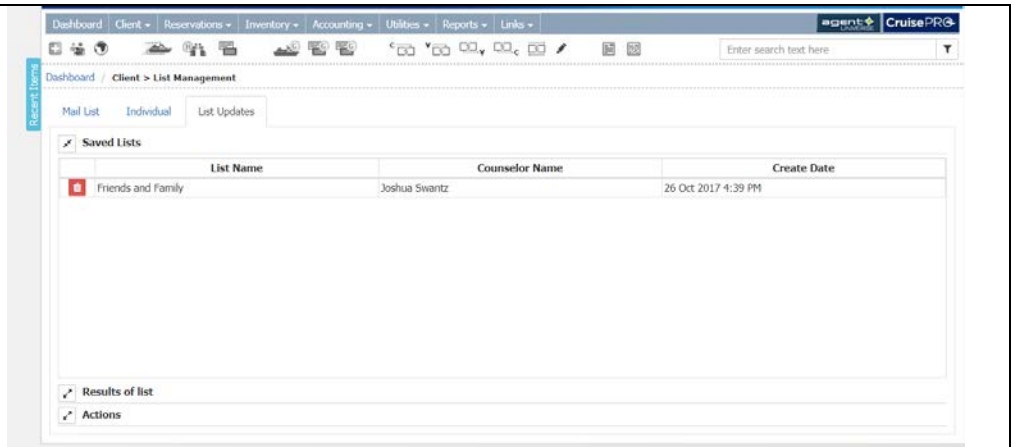
**Step 6:** A pop-up box displays stating that the list was successfully saved. **Click** OK

The screenshot shows a system message box from 'appreprod.myagentmate.com' that says 'The list was successfully saved.' There is an 'OK' button at the bottom right of the box, with a red arrow pointing to it.

**Step 7:** Next **Click** on the List Updates tab

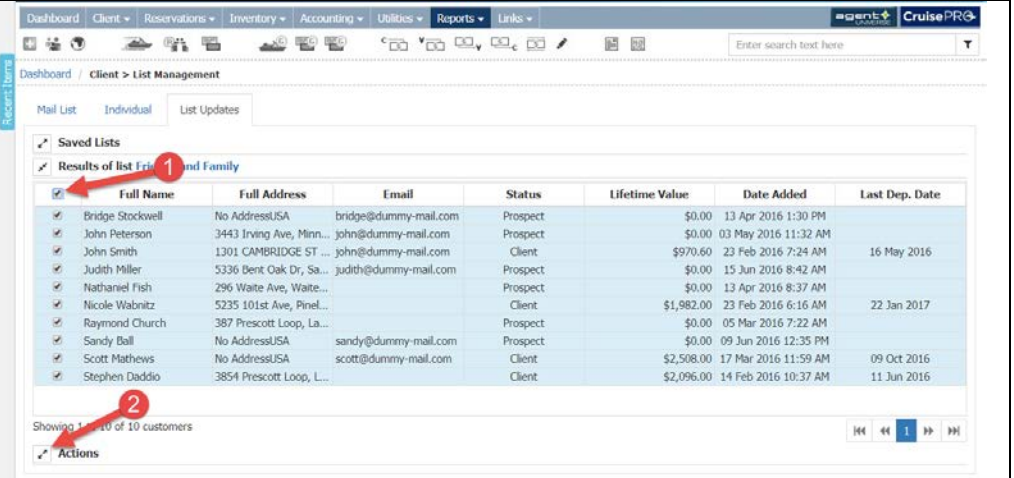
The screenshot shows the 'List Management' interface with the 'List Updates' tab selected. A red arrow points to the 'List Updates' tab.

**Step 8:** Here you will see all available saved lists. **Click** on a list to see your client list.

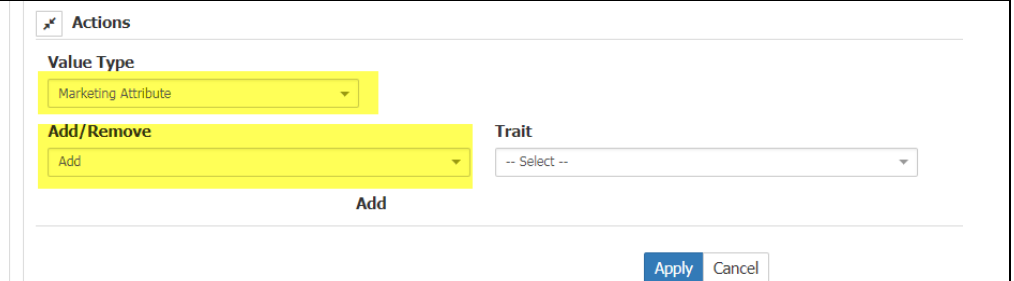


**Step 9:** Your list displays. Review your list. For this example, my list is correct so I'm going to **Click** in the very top left box so that it selects all.

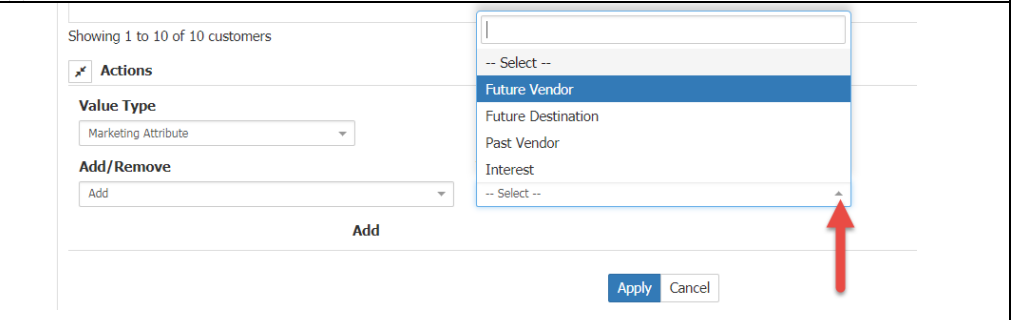
Next, **Click** on the arrows in the bottom left screen to display the Action steps.



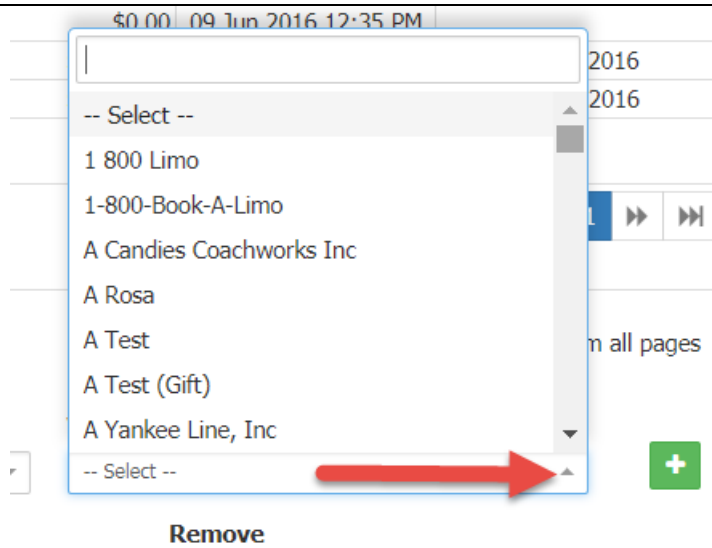
**Step 10:** The Actions options display. Here you can either add and or remove Marketing Attributes for the Clients in your list.



**Step 11:** The available Traits to update display once you **Click** the drop-down arrow. For this example, I'm going to select Future Vendor from the list.

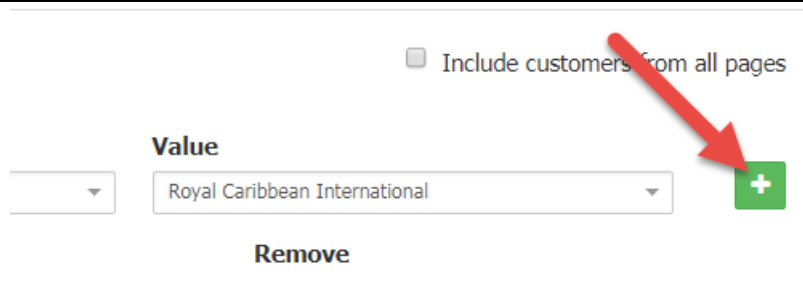


**Step 12:** Click on the drop-down arrow to see a list of Future Vendors that are in the system. Make your selection.



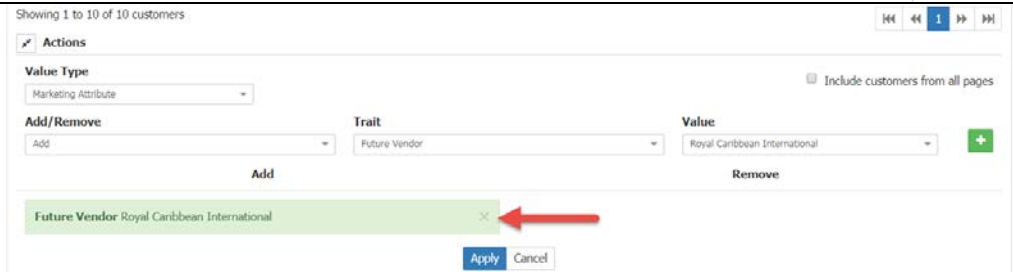
**Step 13:** In this example I've selected Royal Caribbean International.

**Click** on the green plus icon

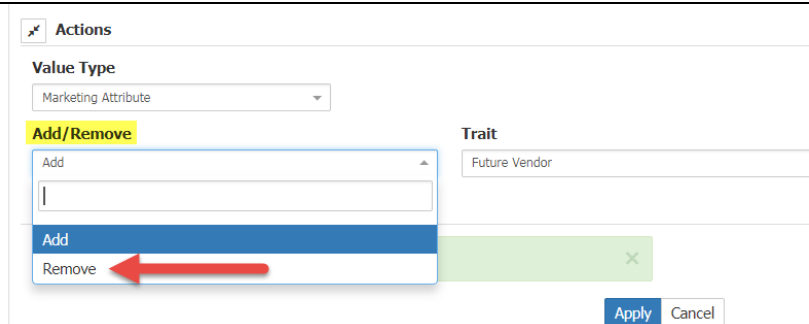


**Step 14:** This will now add a Future Vendor of Royal Caribbean International to your selected list.

Repeat the same process to add other Future Vendors



**Step 15:** This same process above applies if you wish to remove a Future Vendors. You would just select Remove from the Add/Remove drop-down box.



**Step 16:** Continuing with the Adding a Future Vendor to my client list I will **Click** Apply.

Showing 1 to 10 of 10 customers

Actions

Value Type  
Marketing Attribute

Add/Remove  
Add

Trait  
Future Vendor

Add

Future Vendor Royal Caribbean International

Apply

**Step 17:** A Confirmation box displays asking you if you wish to continue. **Click** Yes.

Confirmation

You are about to update 10 customer(s). Do you wish to continue?

Yes No

**Step 18:** To validate pick a customer from your list and then **Click** on the Client Icon.

Demo and Training

Dashboard Client Reservations Inventory Accounting Utilities Reports Links

Dashboard / Client > List Management

Mail List Individual List Updates

Saved Lists

Results of list Friends and Family

	Full Name	Full Address	Email	Status	Lifetime Va
<input checked="" type="checkbox"/>	Bridge Stockwell	No AddressUSA	bridge@dummy-mail.com	Prospect	
<input checked="" type="checkbox"/>	John Peterson	g Ave, Minn...	john@dummy-mail.com	Prospect	
<input checked="" type="checkbox"/>	John Smith	1301 CAMBRIDGE ST ...	john@dummy-mail.com	Client	
<input checked="" type="checkbox"/>	Judith Miller	5336 Bent Oak Dr, Sa...	judith@dummy-mail.com	Prospect	
<input checked="" type="checkbox"/>	Nathaniel Fish	296 Waite Ave, Waite...		Prospect	
<input checked="" type="checkbox"/>	Nicole Wabnitz	5235 101st Ave, Pinel...		Client	\$
<input checked="" type="checkbox"/>	Raymond Church	387 Prescott Loop, La...		Prospect	
<input checked="" type="checkbox"/>	Sandy Ball	No AddressUSA	sandy@dummy-mail.com	Prospect	
<input checked="" type="checkbox"/>	Scott Mathews	No AddressUSA	scott@dummy-mail.com	Client	\$
<input checked="" type="checkbox"/>	Stephen Daddio	3854 Prescott Loop, L...		Client	\$

Showing 1 to 10 of 10 customers

**Step 19:** Type in the Last and First name of the client and then **Click** Search and **Click** on the Client.

Dashboard Client Reservations Inventory Accounting Utilities Reports Links agent CruisePRO

Client \ Guest List

Last name Peterson First name John Phone City State/Pr Zip/PC Email Customer Number

Home Address City St/Pr Zip/PC Counselor All Counselors

Suppress Deleted and Deceased Clients

Search

Last Name	Phone	Email	Customer Number	Home Address	City	St/Pr	Zip/PC	Counselor
<input checked="" type="checkbox"/> Peterson, John		john@dummy-mail.com		3443 Irving Ave	Minneapolis	MN	55412	Craig Pavlus

**Step 20:** This Client Profile screen displays. **Click** on the Marketing radio button.

**Demo and Training** | Revert | Sign Out | Help

**AGENTMATE**

Dashboard | Client | Reservations | Inventory | Accounting | Utilities | Reports | Links

Marketing \ Client Profile

Recent Items: << Agency Previous Profile, << My Previous Profile, Agency Next Profile >>, My Next Profile >>, Add Agency Associate

**John Peterson**  
 Household: John Peterson (Head)  
 Nickname: John Peterson  
 Customer Number: [Red Arrow points to Marketing radio button]

Summary | Preferences | Loyalty #s | **Marketing** | Emergency Contact | Credit Cards | Attachments

Client Status: Prospect | Lifetime Value: \$0.00 | 03 May 2016 Friends or Family | 03 May 2016 | Branch: Main Office | Craig Pavlus

Envelope Salutation: John Peterson  
 Form Letter Salutation: John  
 Email Salutation: John

Edit

**Step 21:** You're now in the Marketing section for that client.

Next, **Click** on the Adjustments radio button and using the scroll bar on the right navigate to List Update to see the Marketing Attribute you just completed.

**John Peterson** | Add Agency Associate

Summary | Preferences | Loyalty #s | **Marketing** | Emergency Contact | Credit Cards | Attachments

Original Marketing Source: Friends or Family | Budget: \$0.00 to \$0.00 | Duration: [ ] to [ ]

Future Vendors: Royal Caribbean International | Future Destinations: Alaska, Amazon River, American Rivers

Past Vendors: [ ] | Interests: [ ]

Additional Attributes: [ ]

Note: Updates made to this screen will apply to the entire household.

Communications | Booking History | **Adjustments** | Reminders | Open | Email / Letter | New

Date	Time	Action	Category	By	Details
03 May 2016	11:31 AM	Client Profile	Opt-In	Head Office Demo Joshua Swantz	HQ Email - Destination Vacation Online
03 May 2016	11:31 AM	Client Profile	Opt-In	Head Office Demo Joshua Swantz	HQ Email OYB - Special Offers and Promotions
03 May 2016	11:31 AM	Client Profile	Opt-In	Head Office Demo Joshua Swantz	HQ Email OYB - Special Offers and Promotions
26 Oct 2017	5:29 PM	List Update	Marketing Attribute	Joshua Swantz	Add Future Vendor: Royal Caribbean International

Start Res. | Start Lead | Save | Cancel | Consolidate | Go

1: Adjustments radio button selected  
 2: Scroll bar on the right of the Adjustments table  
 3: List Update row highlighted