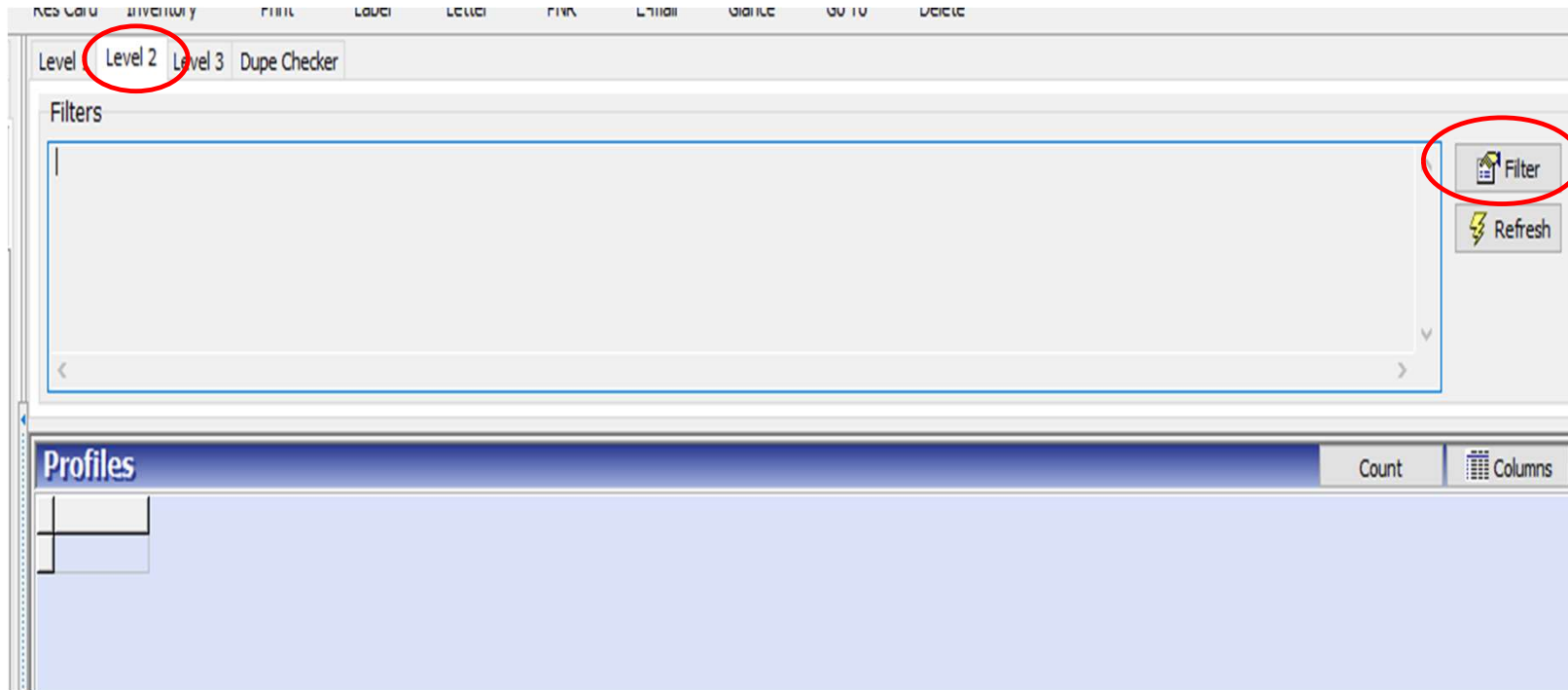


# Level 2 query

1. Click on  
Level 2



2.  
Click  
on  
filter

Once you get to this point you can click on any tab you want and fill out as much or as little as you want. The most important things are agent sine and branch number.

3. Click ok at the bottom or add more information.

The screenshot shows the 'CB Profile Query Level 2' window. The 'General Info' tab is selected. The following fields are circled in red:

- Primary Agent
- Branch
- OK button

The window contains the following sections and fields:

- General Info:** Profile Type, Profile No., Profile Name (Last, First, Middle, Courtesy Title), Additional Name, Primary, Bill To, Ship To, Alternate Address, Second Address, From (JAN), To (DEC), Address Line 1, Address Line 2, Apt./Suite, Zip Code, City, State, Country, Marketing Permission, Invalid, Interface ID, Travel Category, Group, Web ID, Web Password, Referred By, Vendor ID, Preferred Vendor, Branch, Salutation, Airline No, Color.
- Communications:** Type, Primary, Entry, Description.
- Special Dates:** Month, Day, Year, Type, From, To.
- Profile Information:** Profile Create Date, Profile Create User, Profile Modified Date, Profile Modified User, Profile Status (Active).

You can click on the rescards tab and get information such as reservation cycle, trip start date, or end date. You can also find out all of your reservations for a specific vendor.

You must click ok on every page to save

The screenshot shows the 'Profile Query Level 2' window with the 'Res Cards' tab selected. The window is divided into several sections:

- General Info:** Contains fields for 'Create Date', 'Trip Start Date', 'Trip End Date', 'Res Card Traveler Name (Last/First)', 'Confirmed Total Fare', and 'Confirmed Total Commission'.
- Agent Information:** Includes 'Agent Name', 'Res Card Status', 'Reservation Cycle', 'Marketing Source', 'Trip Name', 'Group', 'Region', 'Destination', 'Res Card Locator', 'Activities?', and 'Res Card Branch'.
- More Fields:** A scrollable area with '1. GiftCard/Registry' and '2. Cruise Fee'.
- Reservation:** Includes 'Booking Status', 'Invoice Outside CB', 'Travel Category', 'Reservation Vendor' (highlighted with a red circle), 'Date Reserved', 'Host', 'Confirmation #', 'Record Locator', 'Promo ID', 'Booking Method', 'Reservation Status', 'Group ID', and 'Rate Code'.

At the bottom of the window are three buttons: 'OK' (highlighted with a red circle), 'Cancel', and 'Reset'.

4. Once you do this  
then you can click  
refresh.

Res Card   Inventory   Print   Label   Letter   PNR   E-mail   Glance   Go To   Delete

Level 1   Level 2   Level 3   Dupe Checker

Filters

\*\*\* General Info

Primary Agent Is Equal to "N5 - Annette Peterson" [385]

Profile Status Is Equal to Active

\*\*\* Res Cards

... Reservation Filters . . . . .

Reservation Vendor Is Equal to Delta Vacations

Filter

Refresh

Profiles

Count   Columns


Once you get to this point you can click count to see the number of people in the query.

Filters

\*\*\* General Info  
Primary Agent Is Equal to "N5 - Annette Peterson" [385]  
Profile Status Is Equal to Active

\*\*\* Res Cards  
... Reservation Filters .....  
Reservation Vendor Is Equal to Delta Vacations

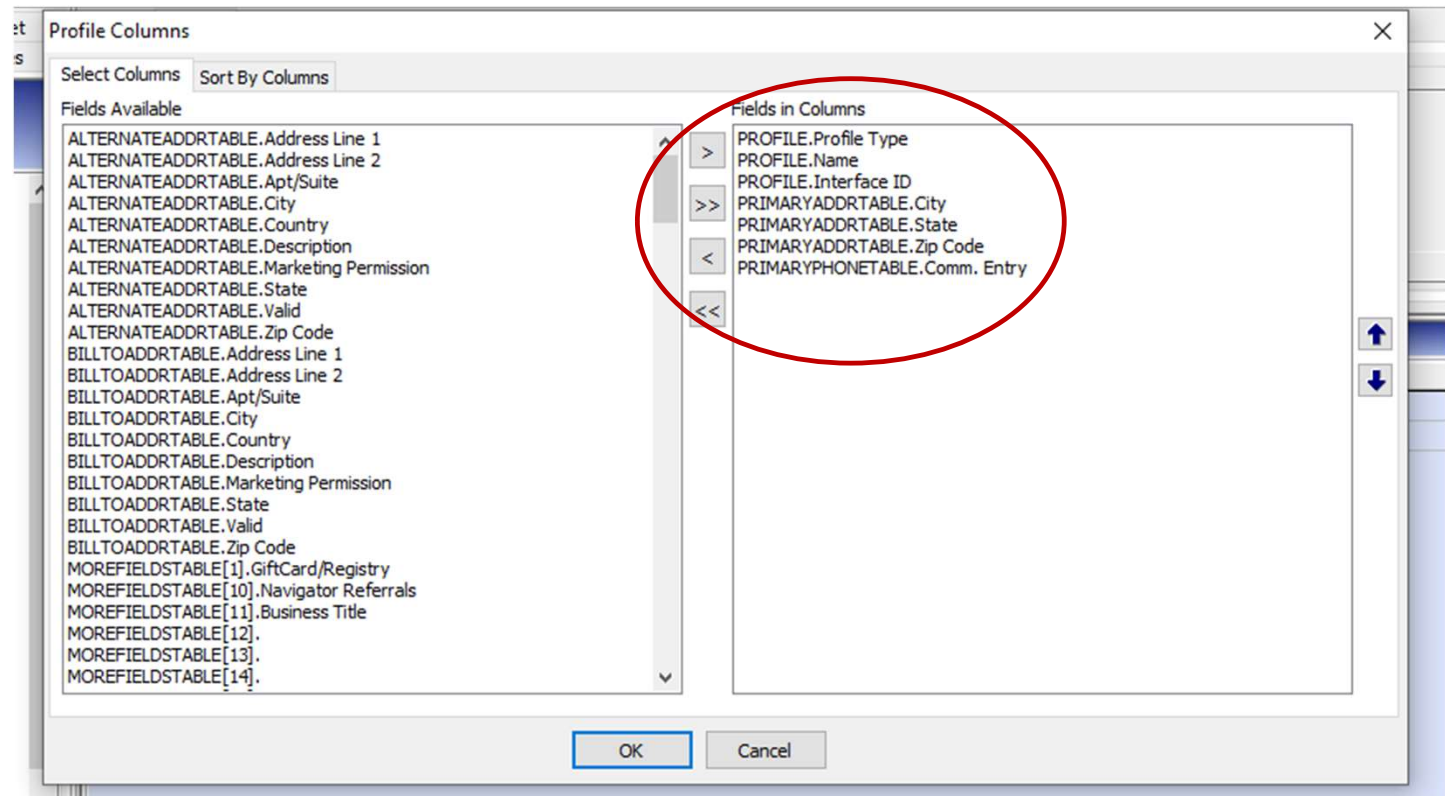
Filter  
Refresh

Profiles

Count Columns

Profile Type (PROFILE)	Name (PROFILE)	Interface ID (PROFILE)	City (PRIMARYADDORTABLE)	State (PRIMARYADDORTABLE)
L	Palmer/Berle	8012320575	Draper	UT
L	Peterson/Annette	8015548201	Salt Lake City	UT

The fields circled red are the fields that come up automatically. You can use the arrows to move anything out that you don't want or add anything from the other column that you would like.



When you want to email to a group of clients you will save most things to your desktop first.

You can either send to the whole query list or you can highlight the ones you want by clicking on it.

5. Click on the email button.

Mailer   Res Card   Inventory   Print   Label   Letter   PNR   **E-mail**   Glance   Go To   Delete

Level 1   Level 2   Level 3   Dupe Checker

**Filters**

\*\*\* General Info  
Primary Agent Is Equal to "N5 - Annette Peterson" [385]  
Profile Status Is Equal to Active

\*\*\* Res Cards  
... Reservation Filters .....  
Reservation Vendor Is Equal to Delta Vacations

Filter  
Refresh

**Profiles**   Count   Columns

Profile Type (PROFILE)	Name (PROFILE)	Interface ID (PROFILE)	City (PRIMARYADDRTABLE)	State (PRIMARYAD
L	Palmer/Berle	8012320575	Draper	UT
L	Peterson/Annette	8015548201	Salt Lake City	UT



1. Once you click on email this box will come up. If you leave it marked to current results in profile manager it will send to the whole list.

2. If you only want to send to the clients you selected you will click on "selected results in profile manager"

3. Check all of the boxes that are checked to make sure it is what you want.

The image shows a 'Merge to E-mail' dialog box with the following settings: 'Sort By' is set to 'E-mail'; 'Include Records' has 'Current Results in Profile Manager' selected; 'Look for E-mails In' is set to 'Profile (If none, then Primary Traveler)'; 'Include Only E-mails with Marketing Permission Checked' and 'Include Only Primary E-mail' are both checked; and 'Use BCC method of sending E-mail' is unchecked. The 'OK' button is highlighted with a blue border. Red arrows point from the numbered instructions to these specific elements: arrow 1 points to the dialog box, arrow 2 points to the 'Selected Results in Profile Manager' radio button, arrow 3 points to the checked checkboxes, arrow 4 points to the 'Use BCC method...' checkbox, and arrow 5 points to the 'OK' button.

4. It's always wise when sending to a big group to check use BCC method so it doesn't show everybody's email.

5. Click ok.

1. This screen will come up next. You will type in the subject.

2. You can either copy and Paste into the body of the email  
Or you can use the attachment button and attach from your desktop.

CB Merge to E-mail Outlook

Annette Peterson  
Do Not Sell Travel See Remarks  
2140 South 1800 East  
Salt Lake City, UT 84106  
US

Phone:  
Fax:  
1 of 2

To: apeterson@morrisrurdock.com  
CC:  
Subject:  
Priority: Normal

Send All  
Send Current

Mailer Options  
☐ Auto-Create  
Create Mailers

Mode:  
Raw HTML

Raw HTML Plain Text Signature Attachments Outlook Settings

Insert Fields Copy from Manager Preview

Close

3. Now you can click on either send all or send current. If you click on create mailers it will send it and it will show that it is sent in your activities tab. It will just be a record that you sent it.