

# Profile, Primary Agent

Leisure

Remind Note Mailer Res Card Receipt Print Label Letter PNR Email Q-View

Alan Smith  
2882 Polk Ave  
Ogden, UT 84403-0406  
USA

Home: +1 (801) 621-3772  
Home: +1 (801) 621-3772

Marketing Codes: 3  
Primary Traveler: Sm  
Groups: OC

General Info Communications Remarks Marketing Travelers Activities Travel History Cards Res Cards Payment History Attachments PNR Entries More Fields

General Info

Type	Last	First	Middle	Courtesy Title
Leisure	Smith	Alan		

Additional Name

Address Info

Address 1 Primary << Modify

Address Line 1  
2882 Polk Ave

Address Line 2 Apt/Suite

Zip Code City State Country  
84403-0406 Ogden UT USA

Additional Addresses

Profile Status

Create User	Create Date	Last Modified User	Last Modified Date	Profile Status

Additional Info

Branch No. Primary Agent  
[30] Ogden WH3B HS - Susan Hatch

Interface ID Salutation  
8016213772

Web ID Web Password

Referred By  
Q3 - CWT

Special Dates

Month	Day	Year	Type

Additional Special Dates

Marketing material such as mailers, emails, Happy Birthday messages, etc. will have the Primary agents and contact info on it.

# Res Card Agent

Clientbase - Sabal, Inc. - [New Res Card]

CB File Edit Reports Merge To Workstation Defaults Global Defaults Utilities Windows Help

**Res Card**

Res Total: 0.00 Invoiced in CB: 0.00 Invoiced Outside CB: 0.00 Balance: 0.00

Invoice Proposal Itinerary Statement Go To Letters

Create Date: 2/5/2020 Agent: SK - Karrie Stewa Status: Active Reservation Cycle: Inquiry Marketing Source: Group: Branch No.: [70] Retail Mgt SKM

Prepared for: Smith/Alan Trip Name: Locator No.: Region: Destination: Trip Start Date: Trip End Date:

Addresses

Client Ship To Address  Use Profile Ship To Client Bill To Address  Use Profile Bill To

Alan Smith  
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Travelers

Smith/Alan

Reservations Invoices Agent Remarks Client Feedback More Fields Edit History

Booking St...	Type	Res Date	Vendor	Res

SigNet messages such as Final Due reminder, Insurance reminder, etc. (anything related to this trip) will come from the 'Res Card Agent' agent.

# What are the rules for changing the Primary Agent in a profile?

## There are reasons you can...

- 1) The primary agent no longer works here
- 2) There is NO travel history in the profile, OR it has been several years since they have traveled.
- 3) The Client tells you they would rather not work with the Primary agent anymore.

If you have questions, please call the support team and ask. Thank you!