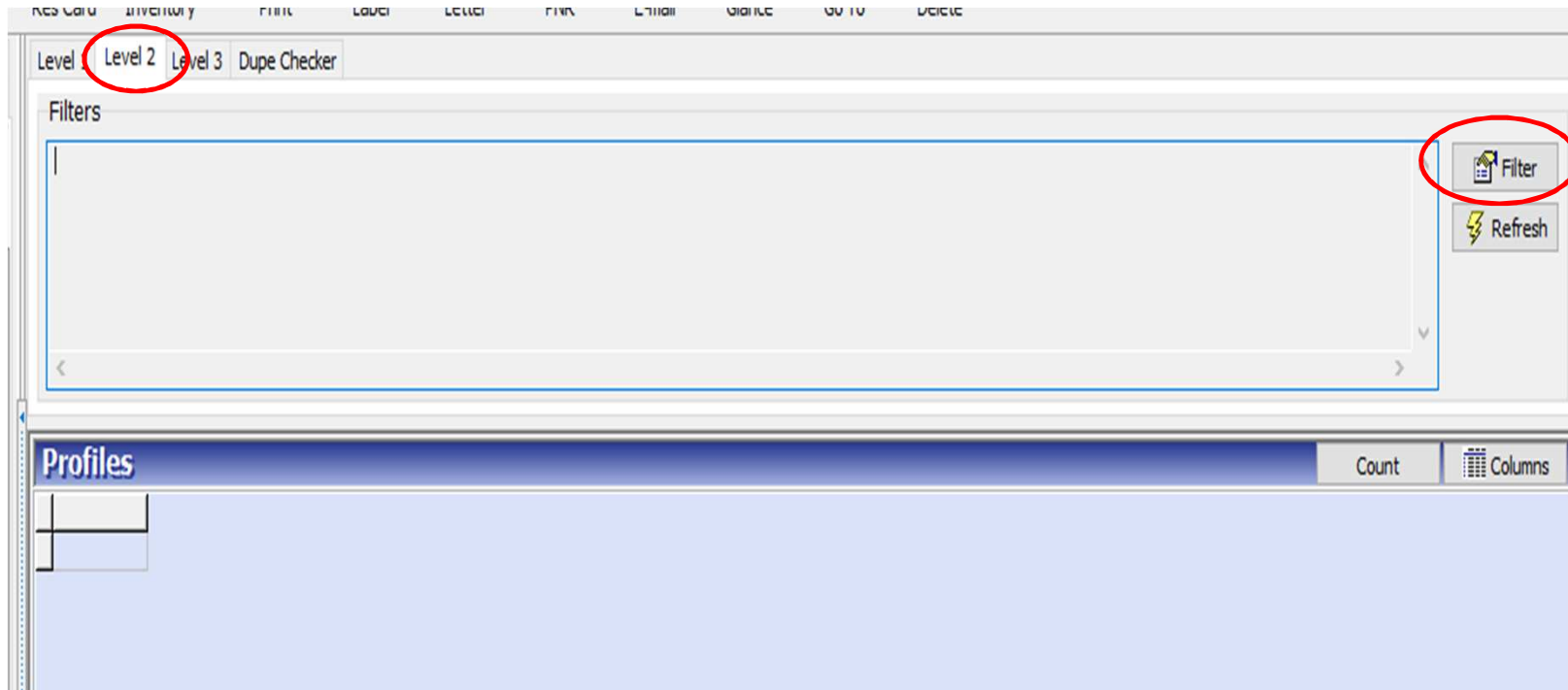


# Level 2 query

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 'Profile Query Level 2' window with the following fields and sections:

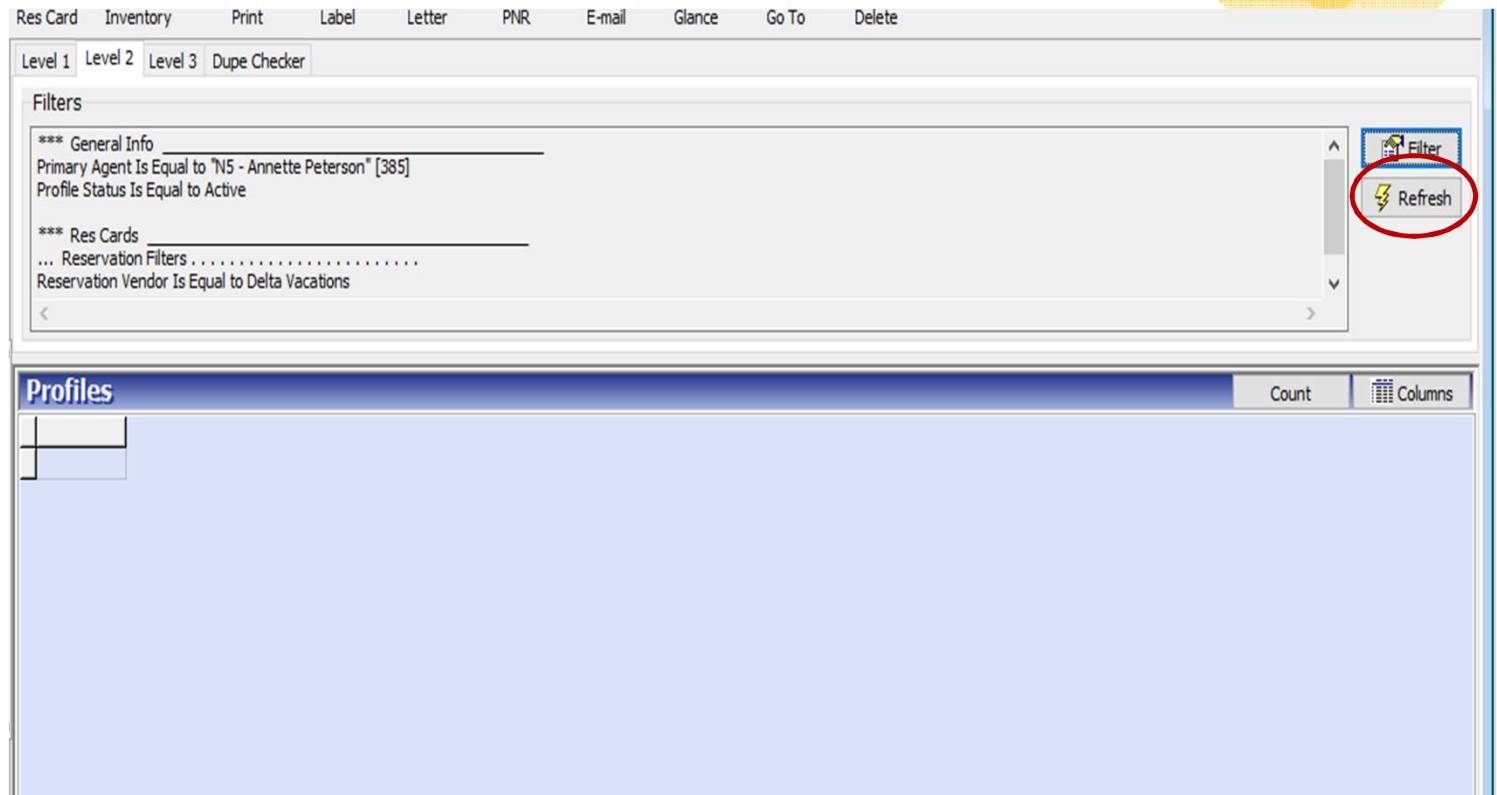
- General Info:** Profile Type, Profile No., Profile Name, Last, First, Middle, Courtesy Title, Additional Name, Primary, Bill To, Ship To, Alternate Address, Second Address, From (JAN), To (DEC), Address Line 1, Address Line 2, Apt./Suite, Zip Code, City, State, Country, Marketing Permission, Invalid.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

You can click on the Res Cards 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 displays the 'Profile Query Level 2' application window. The 'Res Cards' tab is selected and highlighted with a red circle. The 'Res Card' section contains several fields: 'Create Date', 'Agent Name' (circled in red), 'Res Card Status', 'Reservation Cycle', 'Marketing Source', 'Trip Start Date', 'Trip End Date', 'Trip Name', 'Region', 'Destination', 'Res Card Traveler Name (Last/First)', 'Res Card Locator', 'Activities?', and 'Res Card Branch'. Below this is a 'More Fields' section with '1. GiftCard/Registry' and '2. Cruise Fee'. At the bottom of the 'Res Card' section are 'Confirmed Total Fare', 'Confirmed Total Commission', and 'Res Card Record Number' fields. The 'Reservation' section includes 'Booking Status', 'Invoice Outside CB', 'Travel Category', 'Reservation Vendor' (set to 'Delta Vacations' and circled in red), 'Date Reserved', 'Host', 'Confirmation #', 'Record Locator', 'Promo ID', 'Booking Method', 'Reservation Status', 'Group ID', and 'Rate Code'. At the very bottom, the 'OK' button is circled in red, along with 'Cancel' and 'Reset' buttons.

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



The screenshot shows a software interface with a menu bar at the top containing 'Res Card', 'Inventory', 'Print', 'Label', 'Letter', 'PNR', 'E-mail', 'Glance', 'Go To', and 'Delete'. Below the menu bar are tabs for 'Level 1', 'Level 2', 'Level 3', and 'Dupe Checker'. The main area is divided into two sections. The upper section is titled 'Filters' and contains two filter groups: '\*\*\* General Info' with sub-filters 'Primary Agent Is Equal to "N5 - Annette Peterson" [385]' and 'Profile Status Is Equal to Active'; and '\*\*\* Res Cards' with sub-filters '... Reservation Filters . . . . .', 'Reservation Vendor Is Equal to Delta Vacations', and '<'. On the right side of the 'Filters' section, there are two buttons: 'Filter' and 'Refresh'. The 'Refresh' button, which has a lightning bolt icon, is circled in red. The lower section is titled 'Profiles' and has a 'Count' button and a 'Columns' button. It contains a table with two columns and two rows, the first row of which is highlighted.

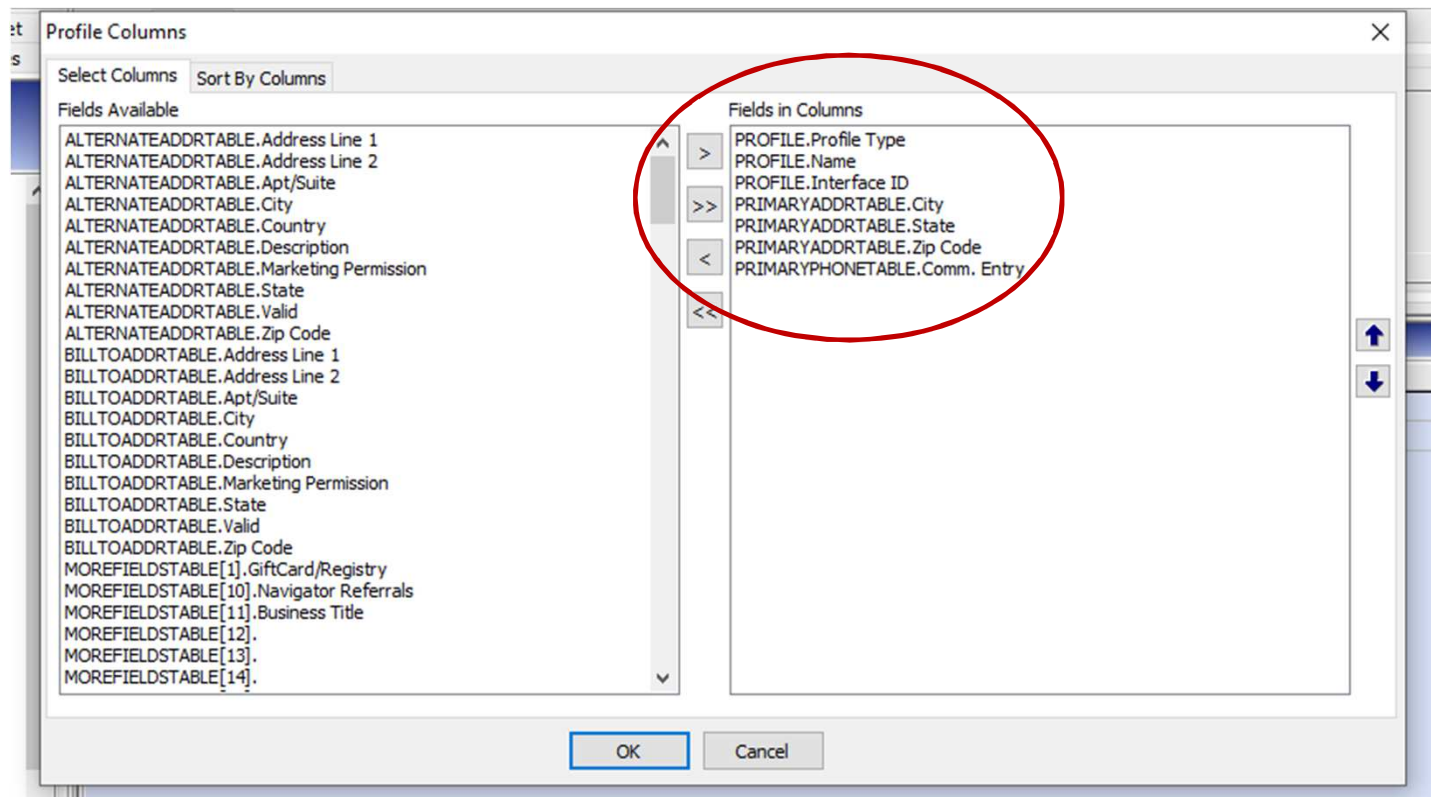
Once you get to this point you can click count to see the number of people in the query.

The screenshot shows a software interface with a 'Filters' section at the top and a 'Profiles' table below. The 'Filters' section includes 'General Info' and 'Res Cards' with various criteria. The 'Profiles' table has columns for Profile Type, Name, Interface ID, City, and State. The 'Columns' button is circled in red, and an arrow points to it from the text below.

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

To change information in the columns, click on 'Columns'

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 the Document to your computer. Saving to your Desktop can make it easy to find.

\*\* Delete it from your desktop after using it.

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.

The screenshot shows a software interface with a toolbar at the top containing icons for Mailer, Res Card, Inventory, Print, Label, Letter, PNR, E-mail, Glance, Go To, and Delete. The E-mail icon is circled in red. Below the toolbar is a 'Filters' section with two filter groups: 'General Info' (Primary Agent Is Equal to 'N5 - Annette Peterson' [385], Profile Status Is Equal to Active) and 'Res Cards' (... Reservation Filters, Reservation Vendor Is Equal to Delta Vacations). To the right of the filters are 'Filter' and 'Refresh' buttons. Below the filters is a table titled 'Profiles' with columns: Profile Type (PROFILE), Name (PROFILE), Interface ID (PROFILE), City (PRIMARYADDRTABLE), and State (PRIMARYAD). The table contains two rows, with the second row highlighted in blue.

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.

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

2. Verify checked boxes are what you want.

The image shows a 'Merge to E-mail' dialog box with the following settings:

- Sort By: E-mail
- Include Records:
  - Current Results in Profile Manager
  - Selected Results in Profile Manager
- Look for E-mails In: Profile (If none, then Primary Traveler)
- Include Only E-mails with Marketing Permission Checked
- Include Only Primary E-mail
- Use BCC method of sending E-mail

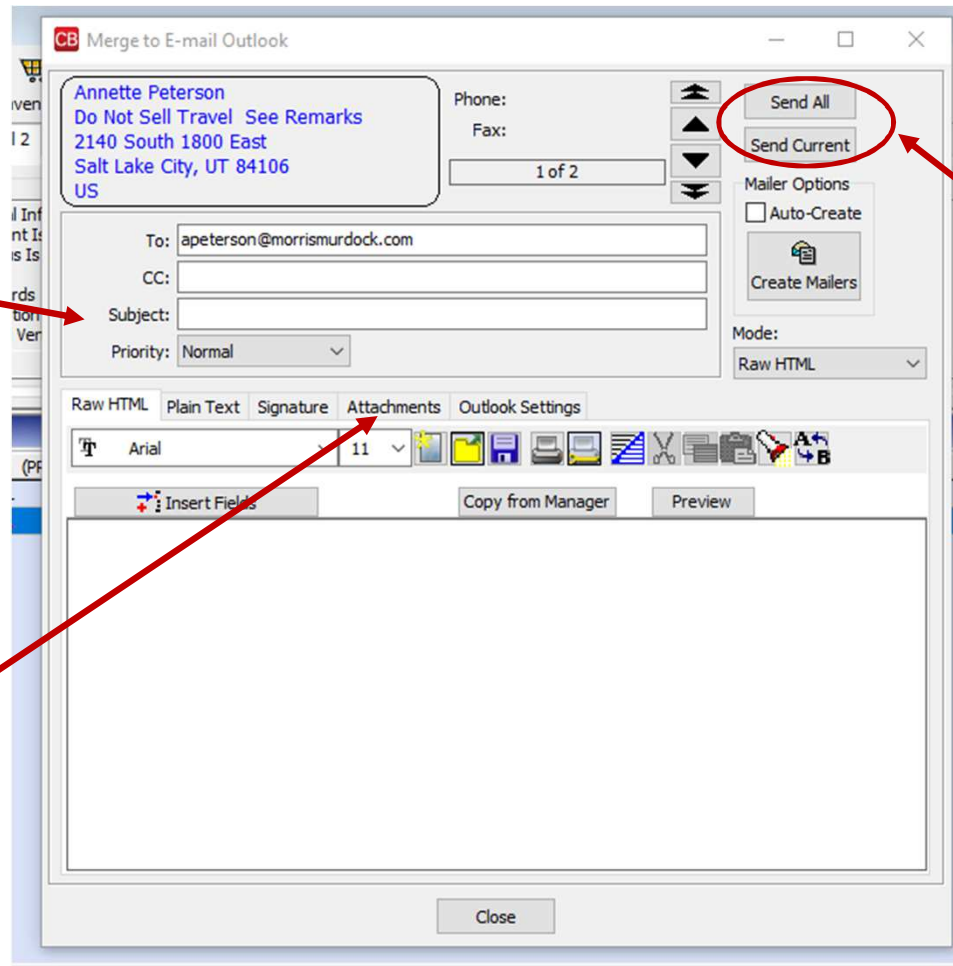
At the bottom are 'OK' and 'Cancel' buttons. Red arrows point from the text instructions to the 'Current Results in Profile Manager' radio button, the 'Include Only Primary E-mail' checkbox, the 'Use BCC method of sending E-mail' checkbox, and the 'OK' button.

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

4. 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.



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.