# AgentMate & Email Marketing

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

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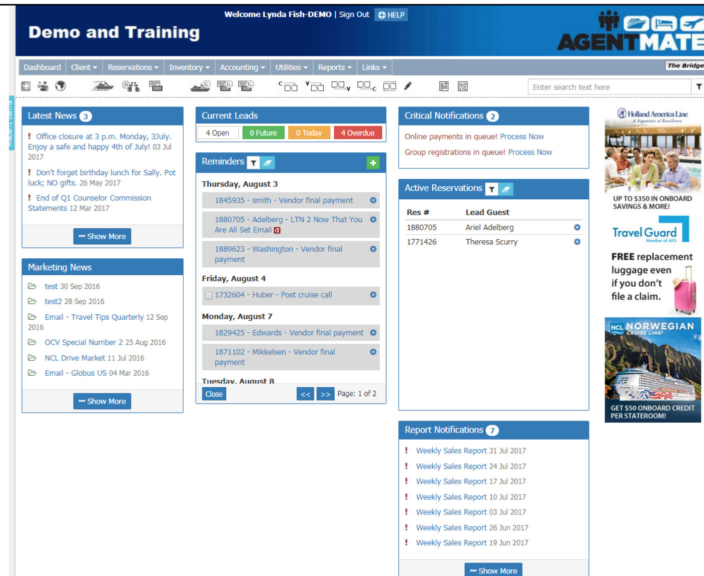
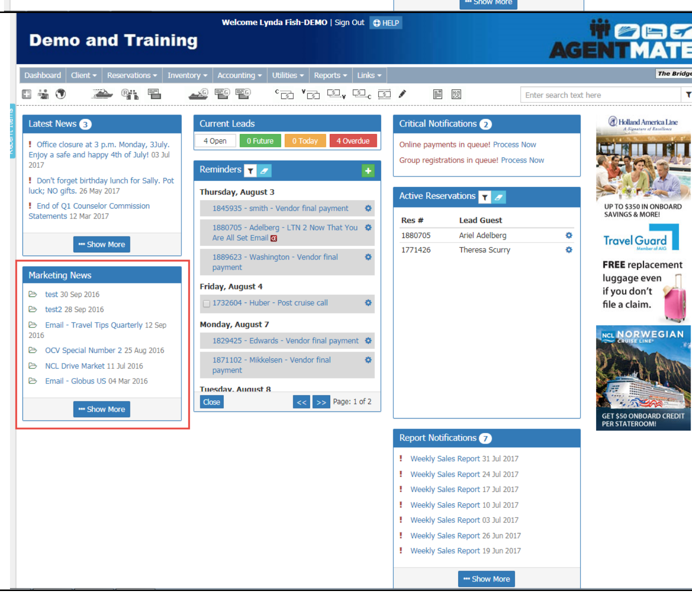
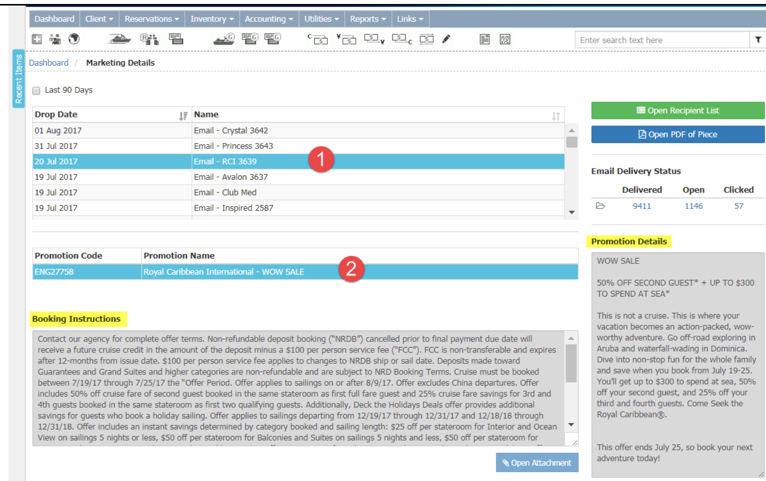
| **Step 1:** When you first login into AgentMate your brought to the main dashboard. |  |
| **Step 2:** Here you can see the recent and upcoming Marketing in the Marketing News Section. Click on Show More to see all the Marketing Details. |  |

<table>
<tr>
<td>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.</td>
<td>
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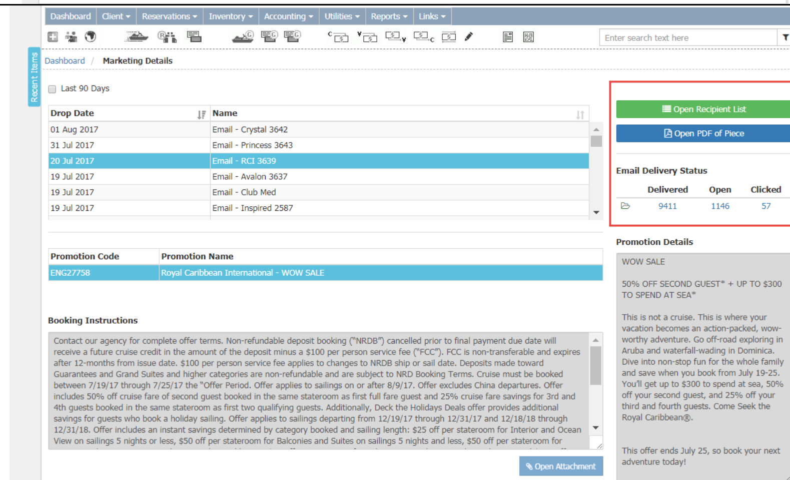
<td>Step 4: You are also able to view a full list of clients who were selected to receive this piece by clicking on the Recipient List. For email promotions, you will see the full delivery results for each promotion. To see that list, click on any one of the numbers to see the details for that category.</td>
<td>
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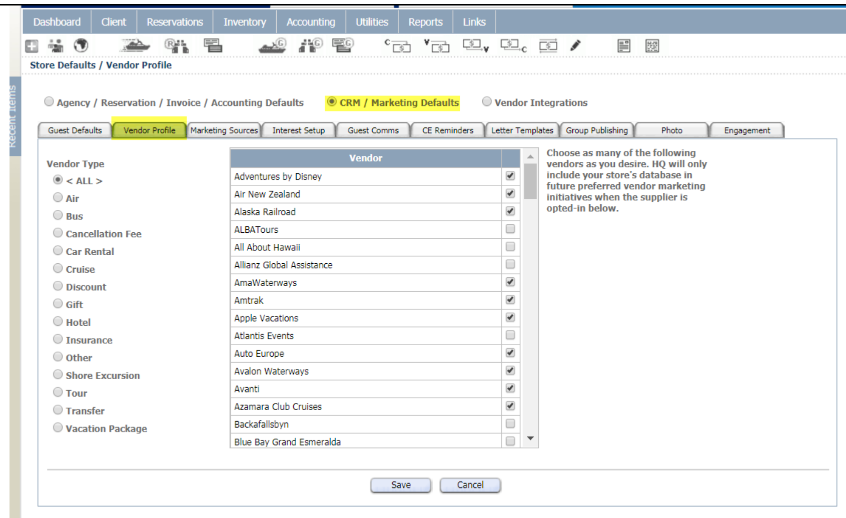
<tr>
<td>Step 5: How do you know if you're set up properly in AgentMate for your customers to receive Email Marketing pieces?</td>
<td>There are 3 of key steps that you need to do inside of AgentMate in order to make that happen.</td>
</tr>
</table>

**Step 6: #1** Within the Vendor Profile Tab all the Vendors are pre-checked for Marketing.

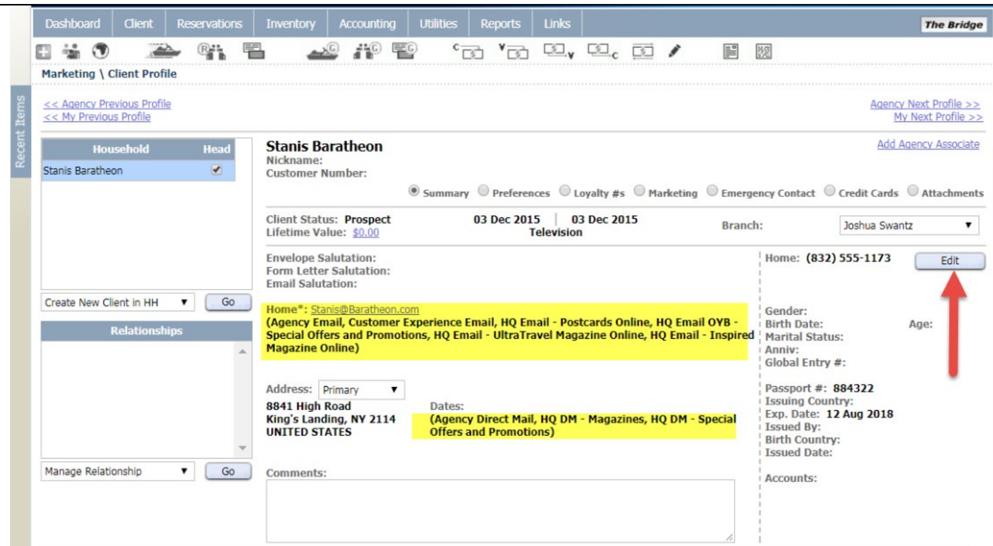
To opt out of a Vendor go to Utilities/Agency Defaults/CRM Marketing Defaults/Vendor Profiles.

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.




**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.

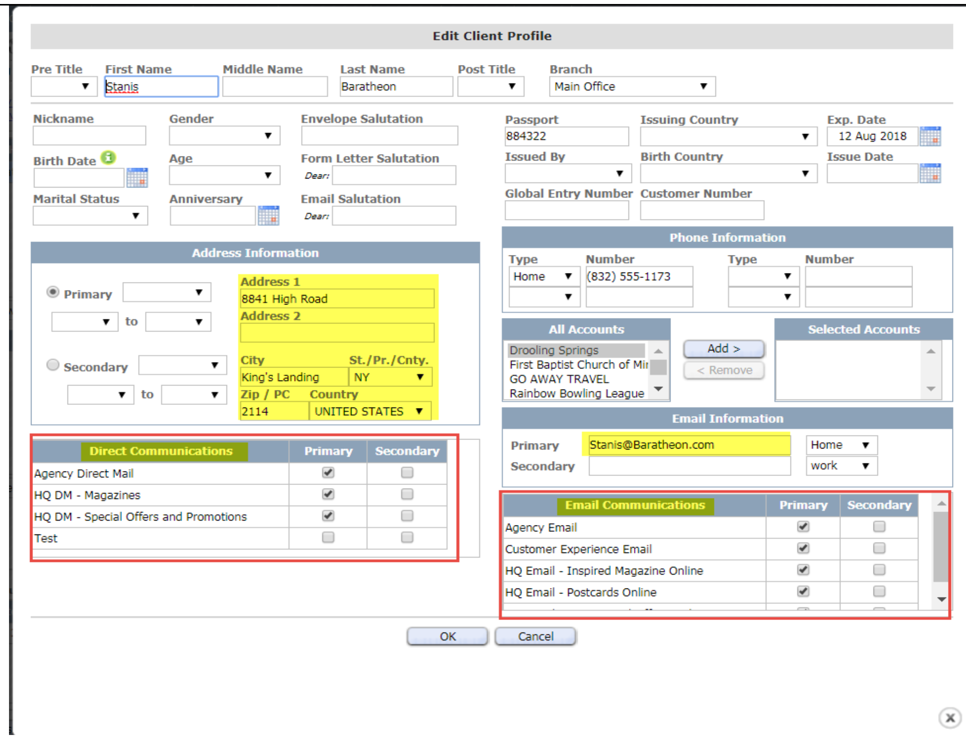


**Step 8:** When you ***Click*** on the edit button the Edit Client Profile dialog box displays. Here you can see what that client is opted in for

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

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

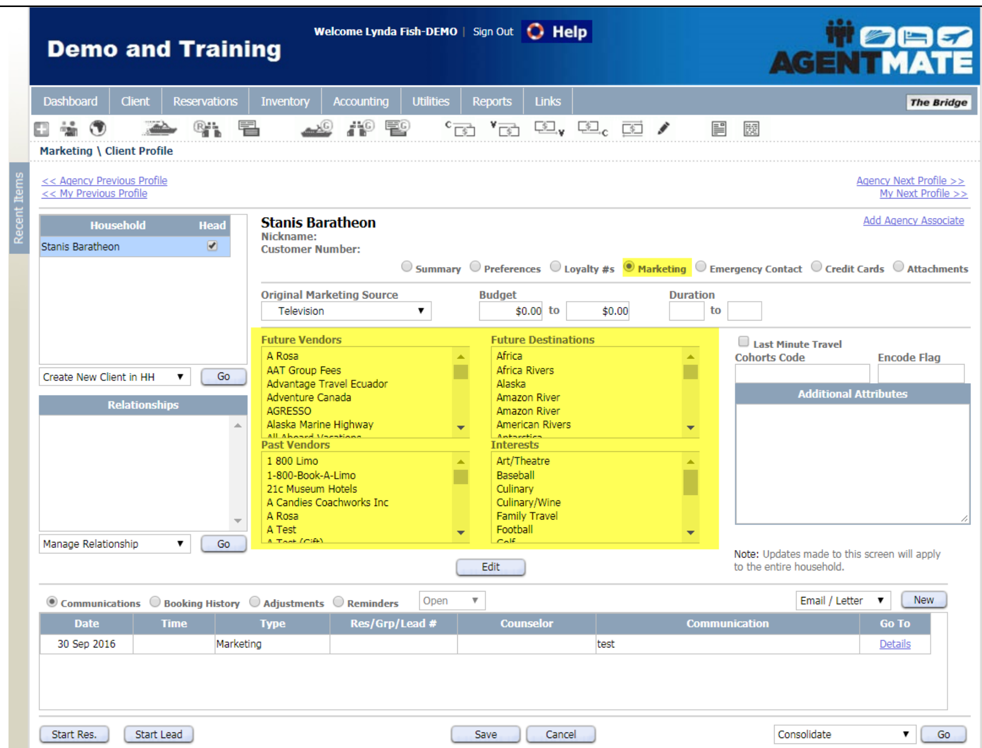
You must have a valid Mailing address and email address for each client to help ensure delivery of Marketing promotions.




**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.



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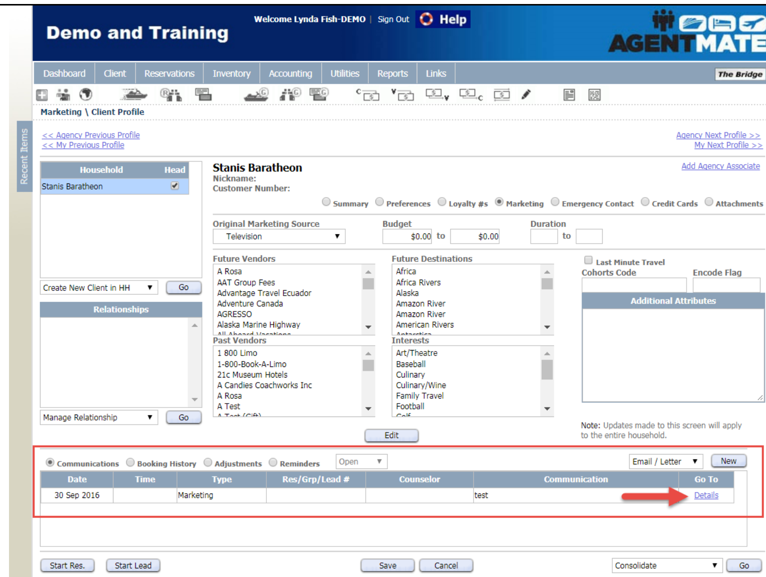
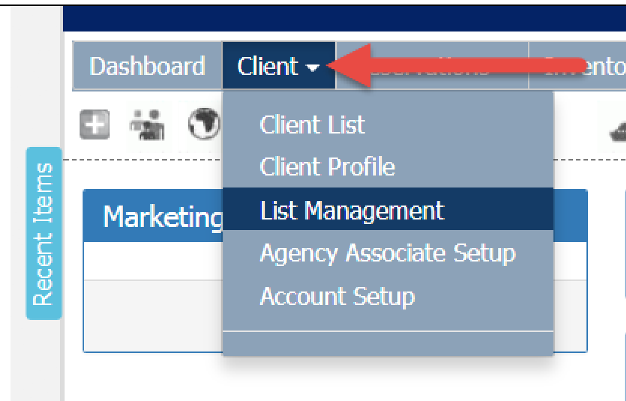
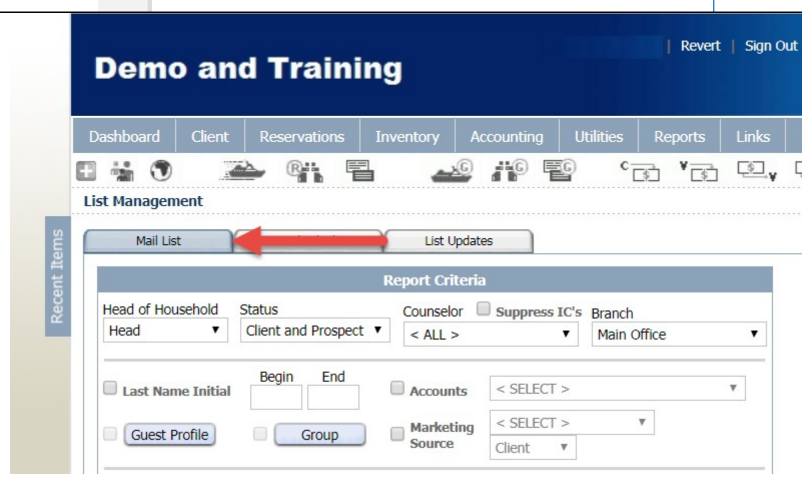
| **Step 10:** All the different Marketing pieces that have been sent out to this client will show up here under the Communications radio button. You can click Details to see more information. |  |
| **Step 11:** How do I globally up-date all my customers to have the future vendors done all at one?<br><br>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. |  |

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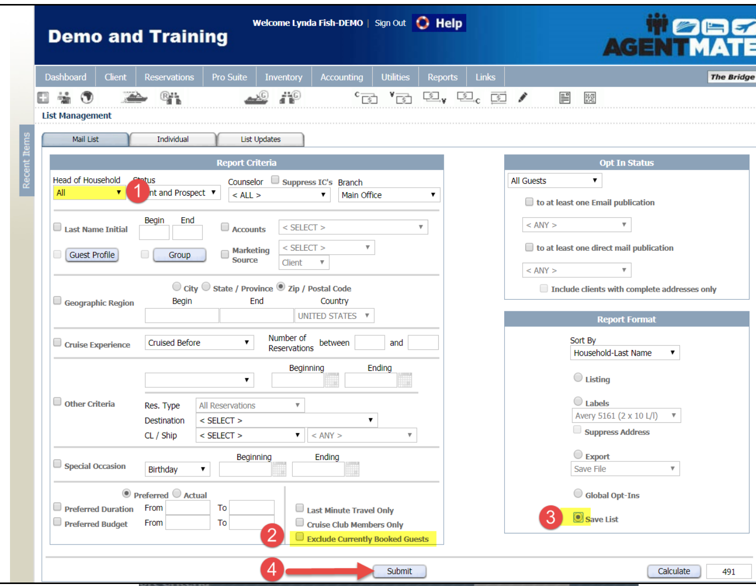
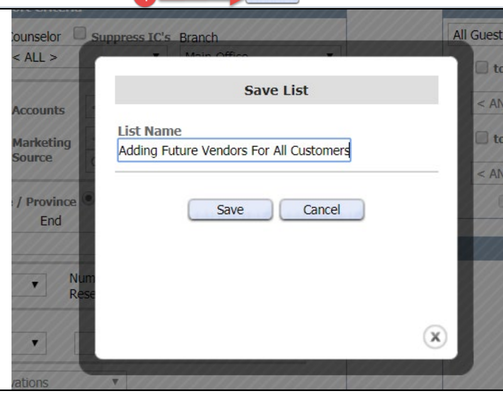
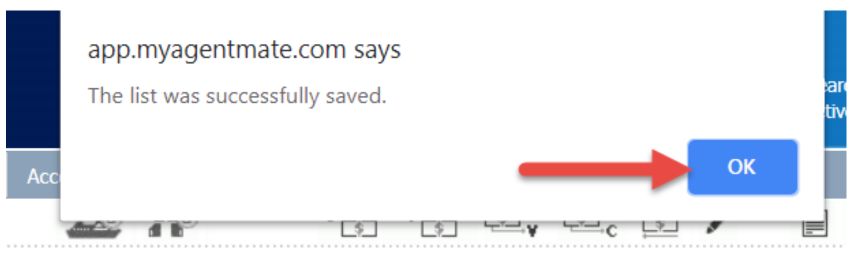
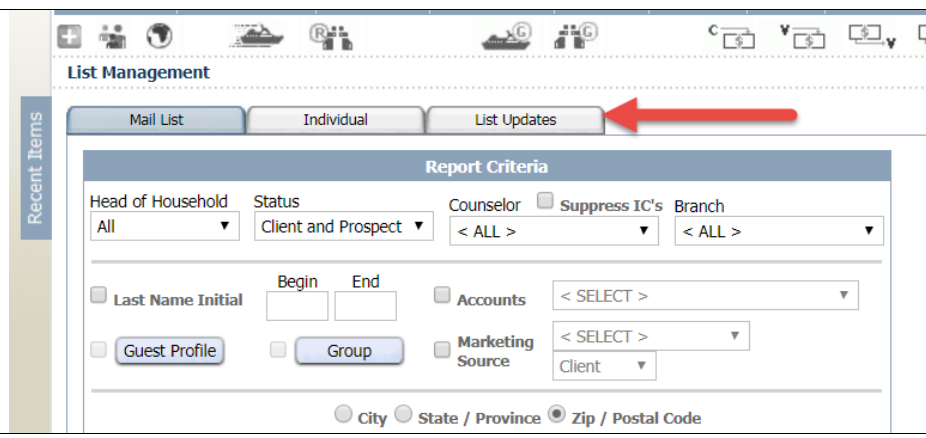
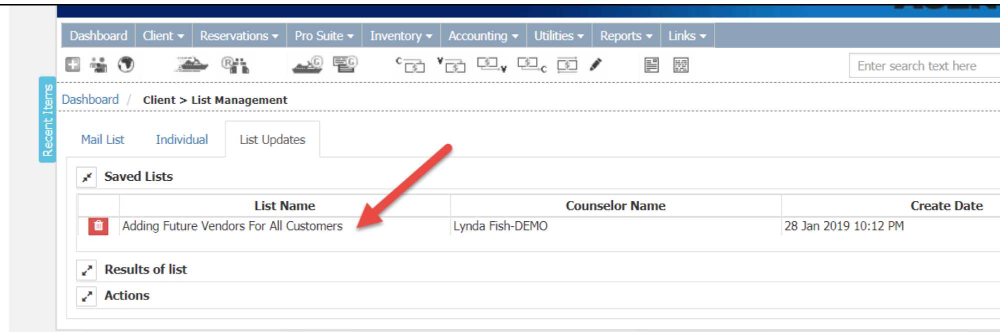
| **Step 13:** Using the drop-down arrow for Head of Household ***Select*** All from the list.<br><br>Then ***Uncheck*** the box next to Exclude Currently booked guests.<br><br>Next Click Save List<br><br>And ***Click*** Submit |  |
| **Step 14:** After you've clicked submit, you'll be asked to name the list. ***Enter*** a name that easily identifies what your list is for.<br><br>***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.

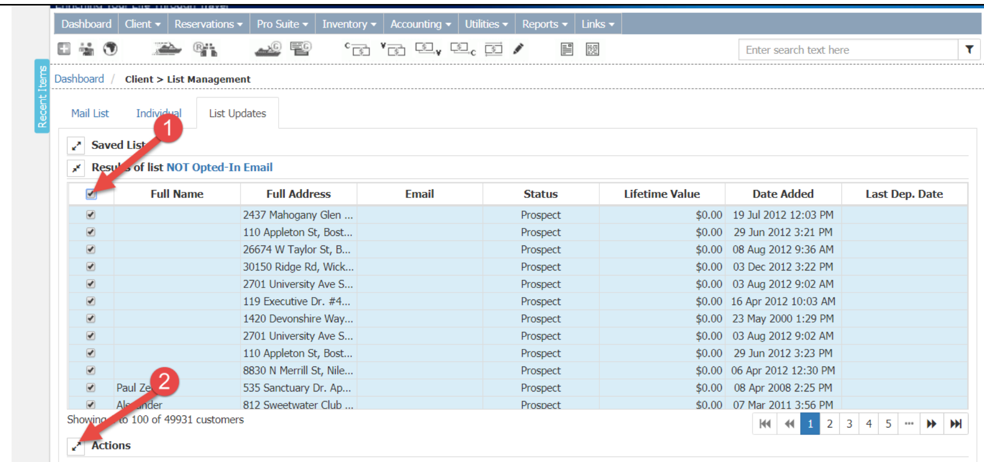



**Step 18:** Your list will expand. Place a ***Check*** in the box in the header row to select what is shown in the screen.

Next ***Click*** on the Action arrows.

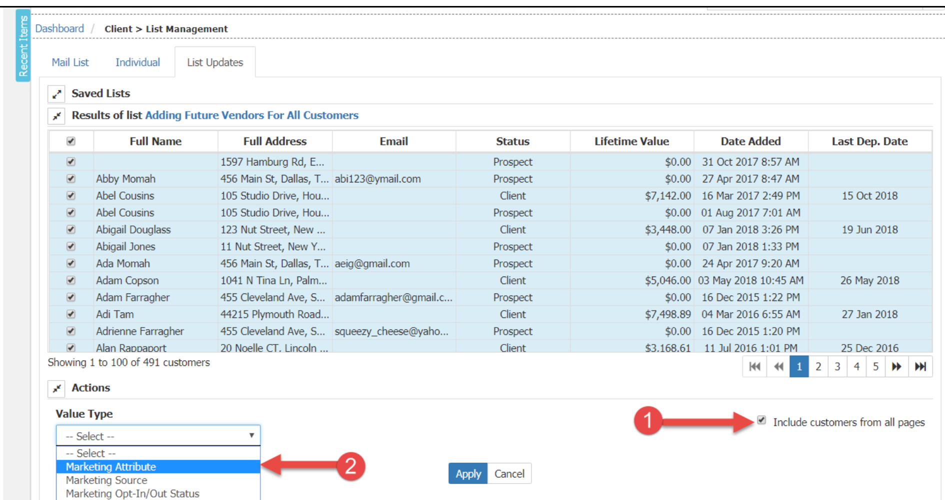
Your list will expand. ***Select*** the box in the header row, this will auto select only the first page of the list.

Next ***Click*** on the Action Arrows




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

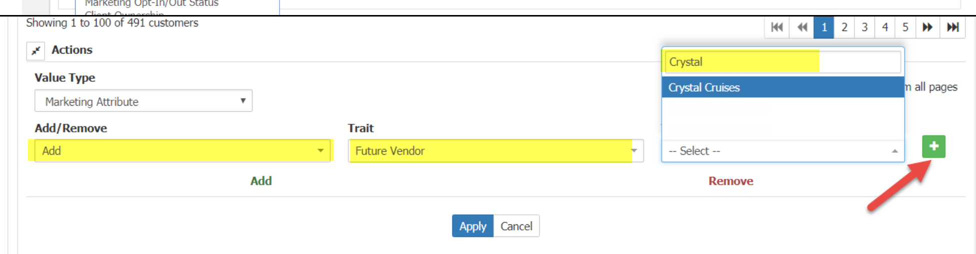
The using the drop-down arrow for the Value Type Box ***Select*** Marketing Attribute from the menu




**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



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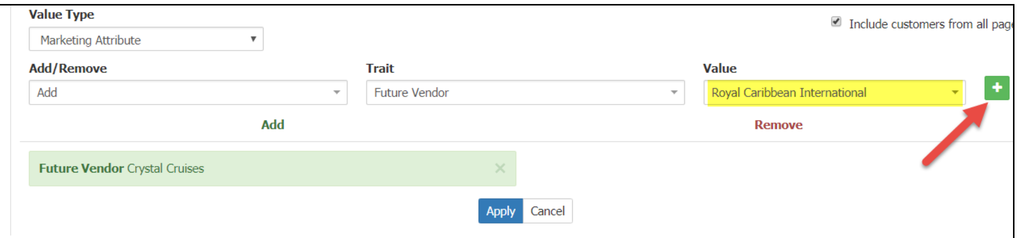
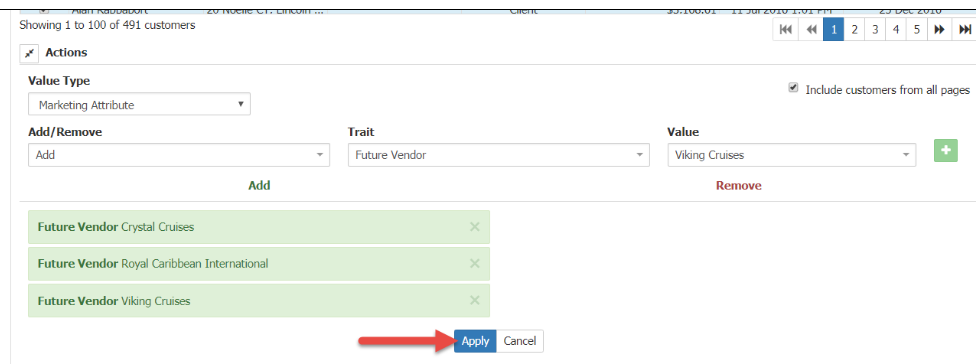
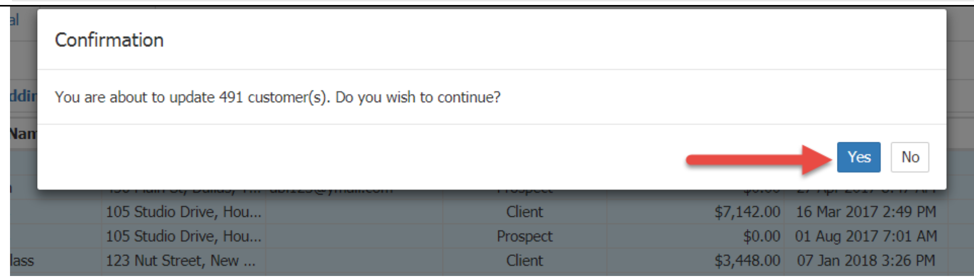
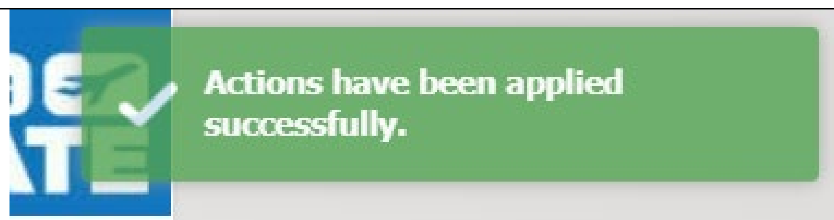
| **Step 21**: In the Value box continue to add as many vendors as you want. |  |
| **Step 22**: Once you've added all the vendors you want ***Click*** Apply. |  |
| **Step 23:** You'll then see a Confirmation dialog box asking you to confirm you request.<br><br>***Click*** Yes to confirm |  |
| **Step 24:** Once it's done applying, you'll receive a message of completion. |  |