

Database export instructions for: ClientBase



The Export Process Step-By-Step

1. Retrieve your Leisure clients in ClientBase.

From the Client Base main page, select the "Leisure" folder from the Profile Manager Options.

2. Select Export

In the top row of ClientBase menu options, click "File" then select "Export"

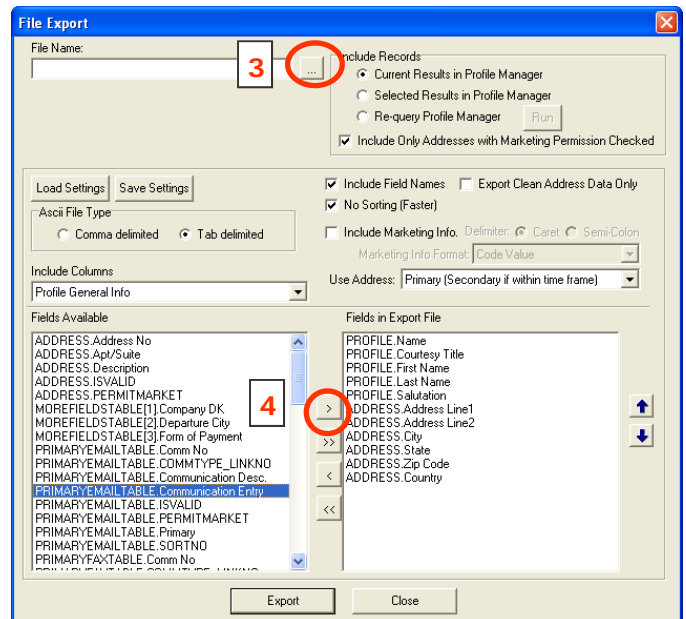
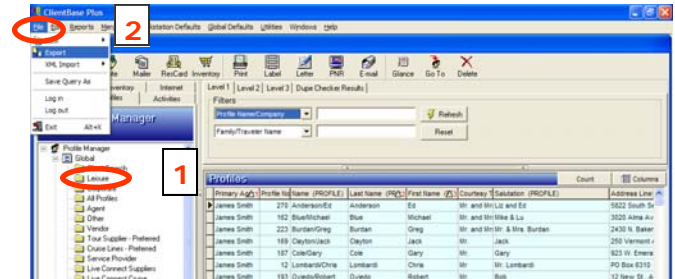
3. Choose the File Name and Destination

The following dialogue box appears. Next to the field for "File Name" click the "...", you are selecting the file name and save location for your exported file. Save your exported list somewhere you will find it again. You can call it anything you would like, we recommend including the date so you know which version of your client list it is. The export format automatically defaults to the correct format, a ".txt" file. NOTE: do not use "/" in your filename.

4. Add Additional Customer Information Fields

By default, ClientBase includes a list of Customer Information Fields that appear in the exported file. These are:

- PROFILE. Name
- PROFILE. Courtesy Title
- PROFILE. First Name
- PROFILE. Last Name
- PROFILE. Salutation
- ADDRESS. Address Line 1
- ADDRESS. Address Line 2
- ADDRESS. City
- ADDRESS. State
- ADDRESS. Zip Code
- ADDRESS. Country



For the purposes of your Engagement List export, you must add three additional fields to the "Fields in Export File" column. To do so, from the left column, "Fields Available" select the following additional fields:

- Primary Email Table. Communication Entry
- Primary Email Table. Permit Market
- Profile. Profile NO

To select these fields, click on them, then select the ">" to move them to the "Fields in Export File" column.

The list of "Fields in Export File" appears as:

- PROFILE. Name
- PROFILE. Courtesy Title
- PROFILE. First Name
- PROFILE. Salutation
- PROFILE. Last Name
- ADDRESS. Address Line 1
- ADDRESS. Address Line 2
- ADDRESS. City
- ADDRESS. State
- ADDRESS. Zip Code
- ADDRESS. Country
- PRIMARY EMAIL TABLE. Communication Entry
- PRIMARY EMAIL TABLE. PERMIT MARKET
- PROFILE. Profile No

Leave the remaining selections of the dialogue box with the default settings.

6. Click "Export."

Your files saves in your stated location.

7. Submit your Client List to Vacation.com

New to Engagement:

If you are enrolling in Engagement, go to <http://joinvacation.com/GetEngaged> and click the link to "Enroll." Complete the online form, you will be prompted to upload your list and logo, as well as provide basic agency information.

Resubmitting your list:

In AgentNet, click the "Engagement" tab to launch the Engagement Order site. In the Engagement Order Site, click the "List Resubmission" link from the left navigation panel. Complete the form and upload your list when prompted. NOTE: Your new list replaces your previous version.