

Welcome to **star**

Where you have access to 10,000+ professional hotel reviews and 300 cruise ship reviews. The following steps will show you how to properly set up your profile and begin researching and recommending hotels and cruise ships that best meet your clients' needs.

QUICKSTART

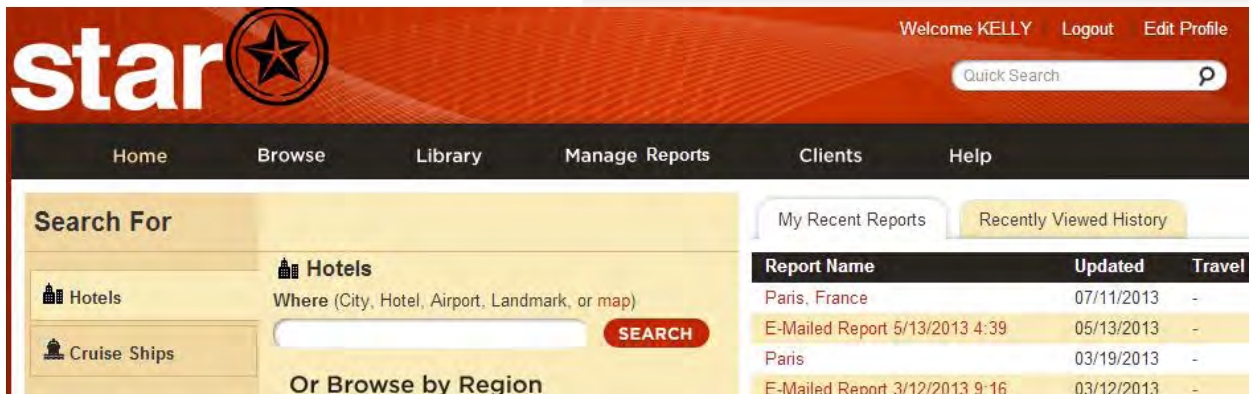
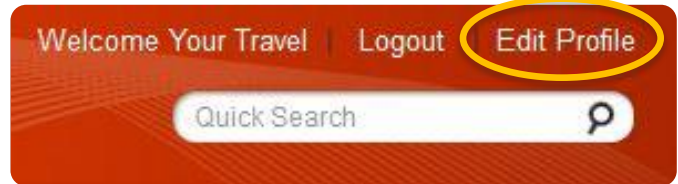
Contents

(Click on specific content item to skip to that page)

- [Setting Up Your Profile](#)
- [How to Search for a Hotel](#)
- [Researching Hotels](#)
- [How to Search for Cruise Ships](#)
- [How to Use Quick Print Options](#)
- [How to Add Items to My Selections](#)
- [Using the My Selections Toolbar](#)
- [Adding a New Client](#)
- [Customizing Your Reports](#)
- [Saving a Report to Your Library](#)
- [Writing an Agent Review](#)

Setting Up Your Profile – Business Card Tab

1. From the Home Page, click on the **Edit Profile** link on the top right of your screen.



2. From here you can add information about yourself and your specialties, including:

Find an Agent
Name
Email
Phone
Destination Specialties
Company Logo
Photo

A screenshot of the 'Business Card' tab in the user profile settings. The page has a dark header with navigation links: 'Home', 'Browse', 'Library', 'Manage Reports', 'Clients', and 'Help'. Below the header is a sub-header with 'Business Card', 'Preferences', and 'Manage Account'. The main content area is titled 'Business Card' and contains a form for user information. The form includes fields for 'First Name', 'Last Name', 'E-Mail Address', 'Office Phone', 'Mobile Phone', 'Fax', 'Website', 'Company Name', 'Company Address 1', 'Company Address 2', and 'Destination Specialties'. The 'Destination Specialties' section has a grid of checkboxes for various locations. At the bottom, there are sections for 'Company Logo' and 'Agent Picture', each with a 'Browse...' button. A red 'SAVE' button is circled in yellow in the bottom right corner.

NOTE: Click the red **SAVE** button before exiting Business Card tab

Setting Up Your Profile – Preferences Tab

Client View

Set up your default values for the report cover page.

The screenshot shows the 'Preferences' tab with 'Client View' selected in the left sidebar. The 'Client View Preferences' section contains the following fields:

- Agent Comments Header: Your Travel Agent Adds:
- Suggested Retail Price:
- Options: ☒ Include Business Card ☒ Include Cover Page
- Report Comment:

Report Items

Set up your default values for the items displayed within a report, ie: specific content for hotels and ships.

The screenshot shows the 'Preferences' tab with 'Report Items' selected in the left sidebar. The 'Report Item Preferences' section contains the following fields:

- Destinations: Template: Full Guide
- Hotels: ☒ Show STAR Review ☒ Include Images in Review ☒ Show Hotel Profile
- Content: ☒ Show Amenities & Facilities ☒ Show Hotel Contact Info ☒ Show Hotel Rates

Email

Set up your default values for the items displayed in report email to client.

The screenshot shows the 'Preferences' tab with 'Email' selected in the left sidebar. The 'Email Preferences' section contains the following fields:

- Subject: Your Travel Agent has sent you a travel42 report!
- Copy Me: ☐
- Personal Message:

Search

Set your default Search values for:

- Home Page
- Sort Order of displayed items

The screenshot shows the 'Preferences' tab with 'Search' selected in the left sidebar. The 'Hotel Search Preferences' section contains the following fields:

- Search For: Hotels
- The items below control the default search: Destination Reports, Cruise Ships
- Sort Order: Name
- Show Only Hotels with STAR Reviews: ☐

Sharing Options

Choose what items, if any, you want to share with other users on your STAR account.

The screenshot shows the 'Preferences' tab with 'Sharing Options' selected in the left sidebar. The 'Sharing Preferences' section contains the following fields:

- ☐ Share Trips
- ☐ Share Library Items

NOTE: Be sure to click **SAVE before exiting Preferences tab**

Setting Up Your Profile – Manage Account Tab

SINGLE USER ACCOUNT

My User Information

Check and/or update your First Name, Last Name, Email Address, User ID and Password.

Business Card

Preferences

Manage Account

Manage Account

My User Information

My User Information

User ID and Password must be between 5 and 32 characters. Your Password must contain at least one digit and one alphabetic character. You can change your User ID and Password at anytime.

First Name:

Last Name:

Email Address:

User ID:

Password:

Retype Password:

SAVE

If you have any questions or problems, please contact our Customer Care department at 888-238-0043 (in the US) or 336-714-3164 (outside the US) or email starserviceonline@ntmlc.com.

starserviceonline@ntmlc.com

If you have any questions or problems, please contact our Customer Care department at 888-238-0043 (in the US) or 336-714-3164 (outside the US) or email

SAVE

Retype Password:

Password:

User ID:

Email Address:

First Name:

Last Name:

NOTE: Be sure to click  before exiting Manage Account tab

Setting Up Your Profile – Manage Account Tab

MULTI USER ACCOUNT

If you are the administrator for a multi-user account, this is what you see in your 'Manage Account' Summary tab. This is the area to make changes to all levels of your account. You can add/delete users, update payment method, view your billing history or change your specific user ID and/or password.

Summary

This displays all account and subscription information in one convenient place. You may also choose each item individually by clicking on the specific description in the listed items below Summary.

Business Card

Preferences

Manage Account

Manage Account

Summary

Account Administrator

My User Information

Billing History

Payment Method

Subscription

User Admin

Account & Subscription Summary

Account Profile
NORTHSTAR TRAVEL MEDIA, LLC
Account #: SA-730568-4000256
KELLY MCPHERSON
KMCPHERSON@NTMLLC.COM
8882380043
200 BROOKSTOWN AVE STE 301
WINSTON-SALEM, North Carolina 27101
[Update](#)

Payment Method
None
Auto Pay: No
[Manage](#)

Plan Information
STAR Annual
Next Renewal: Feb 6, 2014
Auto Renew: Yes
[See subscription terms & details](#)

Billing history
[See billing history](#)

User Information
User ID: kmcperson
Name: KELLY MCPHERSON
Password: *****
Email: KMCPHERSON@NTMLLC.COM
[Update](#)

User Admin
User Licenses: 76
[Increase User Licenses](#)
[Manage Licenses](#)

If you have any questions or problems, please contact our Customer Care department at 888-238-0043 (in the US) or 336-714-3164 (outside the US) or email starserviceonline@ntmlc.com.

NOTE: Be sure to click **SAVE** before exiting Manage Account tabs, if applicable

Setting Up Your Profile – Manage Account Tab

MULTI USER ACCOUNT

Account Administrator

This displays all administrator account information.

Business Card

Preferences

Manage Account

Manage Account

Manage Account

Summary

Account Administrator

My User Information

Billing History

Payment Method

Subscription

User Admin

Account Administrator

To change your registered website Email Address or Name, please goto [My User Information](#).

Administrator Information

Enter your administrator account information below. All fields are required.

Account Number: EPG00000049

First Name: Kelly

Last Name: McPherson

Email Address: kmcperson@ntmlc.com

Company Name: travel42

Country: United States

Street: 200 Brookstown Ave

City: Winston-Salem

State/Province: North Carolina

Postal Code: 27101

Phone: 336-714-3328

SAVE

My User Information

This displays all user information.

Business Card

Preferences

Manage Account

Manage Account

Manage Account

Summary

Account Administrator

My User Information

Billing History

Payment Method

Subscription

User Admin

My User Information

User ID and Password must be between 5 and 32 characters. Your Password must contain at least one digit and one alphabetic character. You can change your User ID and Password anytime.

First Name: Kelly

Last Name: McPherson

Email Address: kmcperson@ntmlc.com

User ID: kmcperson

Password:

Retype Password:

☒ Yes, please send me the travel42 newsletter to keep me up-to-date on travel news and product features

SAVE

NOTE: Be sure to click **SAVE** before exiting Manage Account tabs, if applicable

Setting Up Your Profile – Manage Account Tab

Billing History

This displays all past invoices and other payment details.

Business Card

Preferences

Manage Account

Manage Account

Manage Account

Summary

Account Administrator

My User Information

Billing History

Payment Method

Subscription

User Admin

Billing History

Invoices

Click on an Invoice Number below to view a PDF document of that invoice.

Invoice Number	Invoice Date	Amount	Due Date	Balance
INV00021488	07/21/2012	Included	07/21/2012	\$0.00
INV00008066	07/21/2011	Included	07/21/2011	\$0.00
INV00001232	02/02/2011	(\$45.26)	02/02/2011	\$0.00
INV00001215	02/01/2011	\$45.26	02/01/2011	\$0.00

Payments

Your payments are listed below.

Ref Id	Payment Date	Amount	Status	Type	Method
VSHA6BFBAC25	02/01/2011	\$45.26	Processed	Electronic	

Payment Method

This displays all information regarding your method of payment.

Business Card

Preferences

Manage Account

Manage Account

Manage Account

Summary

Account Administrator

My User Information

Billing History

Payment Method

Subscription

User Admin

Manage Payment Method

Manage Payment Methods

Select the Current Default Payment Method

Payment Method: AmericanExpress - Kelly C McPherson - *****1000

SELECT

Update an Existing Payment Method

Card: AmericanExpress - Kelly C McPherson - *****1000

Card Expiration: Month Year

UPDATE

Enter a New Payment Method

NOTE: Be sure to click **SAVE** before exiting Manage Account tabs, if applicable

Setting Up Your Profile – Manage Account Tab

Subscription

This displays information regarding your subscription terms and details.

Business Card

Preferences

Manage Account

Manage Account

Summary

Account Administrator

My User Information

Billing History

Payment Method

Subscription

User Admin

Subscription Terms & Details

To cancel your subscription, change your number of user licenses, or change your plan, please call 866-566-8137 (in the US) or 336-896-0712 (outside the US).

If you have any questions or problems, please contact our Customer Care department at 888-238-0043 (in the US) or 336-714-3164 (outside the US) or email starserviceonline@ntmlc.com.

User Admin

This displays all user information. You can add/delete users and invite new users.

Business Card

Preferences

Manage Account

Manage Account

Summary

Account Administrator

My User Information


Billing History

Payment Method



Subscription

User Admin

Group User Administration

Your subscription allows 4 users. You have have 3 available user licenses left. 

Email	User ID	Status	User Name	User Type
-------	---------	--------	-----------	-----------

 Delete Checked  Send New License Invitations [CREATE USER >](#)

Open Invitation link: </User/Join?tnid=Ky4QEgXhe%2b88So2oYX8YH5Z5gT0%2bK%2b44&hsm=MXhAaLc3pGs%3d&csm=f98&p=KLwoQ63FiLmfXKKoADSFw%3d%3d>

Your *Invitation* link is a custom link sent to users that you invite that works only for your account. At times, it may be necessary to change this link in order to cancel all existing invitations. To do this, just click [here to change](#) link above.

The following users have been deleted and are shown only for reference purposes. If you have questions about these users, please contact Customer Care.

Email	User ID	Status	User Name	User Type
shojer@ntmlc.com	730568-002	Deleted	SUSAN HOJER	User
KELLY.MARLOW@LEONARDO.COM	730568-005	Deleted	KELLY MARLOW	User
smcilhenny@ntmlc.com	730568-009	Deleted	SCOTT MCILHENNY	User
kim.hall@yahoo.com	khall	Deleted	Kim Hall	User
william.mcpherson@wellsfargo.com	wolfpack	Deleted	Will McPherson	User

If you have any questions or problems, please contact our Customer Care department at 855-872-8542 (in the US) or 336-714-3325 (outside the US) or email travel42@ntmlc.com.

NOTE: Be sure to click **SAVE** before exiting Manage Account tabs, if applicable

How to Search for a Hotel

Once logged in, you can search for **Hotels** by clicking on the “Hotels” link to the left of the map. If you aren’t on the Home Page, click the **Home** link in the menu bar at the top. You can also **Browse by Region** on the interactive map below the search box.

The screenshot shows a web interface with a dark blue menu bar at the top containing the links: Home, Browse, Library, and Manage Reports. Below the menu bar is a light blue search area. On the left side of this area, there is a vertical sidebar with two options: 'Hotels' (indicated by a hotel icon) and 'Cruise Ships' (indicated by a ship icon). The main part of the search area is titled 'Search For' and contains a section for 'Hotels'. Below this, there is a text input field labeled 'Where (City, Hotel, Airport, Landmark, or map)' and a red 'SEARCH' button. Below the search box, there is a section titled 'Or Browse by Region' which features a world map.

When you begin typing in the search box, it will auto-populate a drop-down list with possible Hotels you’re interested in viewing. If you see the Hotel in the list, mouse over the name and click to bring up the information.

This screenshot shows a dropdown menu that appears after typing 'st. tropez' into the search box. The menu is titled 'Hotels' and contains a list of search results. Each result is preceded by a small hotel icon. The first result is 'St Tropez, France'. Below it, there are several other results, including 'St Tropez des Caraibes - Orient Bay, St Martin, St Ma', 'Best Western Le Mas Bellevue/dcs - St Tropez, France', 'Chateau de La Messardiere - St Tropez, France', 'Chateau Hotel de la Messardiere - St Tropez, France', 'St Tropez Hotel - Las Vegas, Nevada', 'St Tropez Resort - Surfers Paradise, Queensland, Aus', 'Byblos Saint Tropez - St Tropez, France', 'Hotel Sezz Saint-Tropez - St Tropez, France', 'La Bastide de Saint Tropez Hotel - St Tropez, France', 'Hotel Le Yaca - St Tropez, France', 'Hotel Benkirai - St Tropez, France', 'Hotel Byblos - St Tropez, France', 'Hotel de La Ponche - St Tropez, France', 'Hotel des Lices - St Tropez, France', and 'Hotel Du Soleil De Saint Trope - Port Grimaud, France'. At the bottom of the list, there is a link that says 'Can't find what you are looking for? Click here for more choices'.

You can also click the sentence in italics at the bottom of the populated search list for more choices.

Researching Hotels

From any screen, click on the **Home** link on the top navigation bar.

The screenshot shows the top navigation bar with links: Home, Browse, Library, Manage Trips, Clients, Resource Center, and Help. Below this is the 'Search For' section. On the left, there are buttons for 'Hotels' and 'Cruise Ships'. On the right, there is a search bar with the placeholder text 'Where (City, Hotel, Airport, Landmark, or map)' and a red 'SEARCH' button. Below the search bar is a world map with the text 'Or Browse by Region'.

Begin by typing a Hotel destination in the Search bar above the world map. From the Search Results page, you can now begin to refine your results.

The screenshot shows the 'Filter Paris Hotels' section. It includes a '174 Matching Hotels' count, a 'Sort | Reverse Sort' dropdown menu, and a list of filter options: STAR Rating, Amenity Rating, Agent Rating, Rate, City, Commission, and Distance. The 'STAR Rating' option is highlighted. To the right, there are 'Hotel Preferences' including 'Pays Commission', 'In-Room Internet', and 'Pool'. Below these are 'Hotel Preferences' checkboxes for 'Show only STAR hotels', 'STAR Rating', and 'Amenity Rating'. At the bottom, there are three buttons: 'LIST VIEW', 'MAP VIEW', and 'COMPARE'.

You can refine your search by any of the following options:

The screenshot shows the 'Sort | Reverse Sort' dropdown menu. The options are: STAR Rating, Name, STAR Rating, Amenity Rating, Agent Rating, Rate, City, Commission, and Distance. The 'STAR Rating' option is highlighted.

Once your hotel list is refined, you can review them by any of 3 options:

- List View
- Map View
- Compare

The screenshot shows three buttons: 'LIST VIEW', 'MAP VIEW', and 'COMPARE'. The 'LIST VIEW' button is highlighted.

Researching Hotels

Hotels Related

Filter Paris Hotels Zoom | Show hotels in suburban area | Hide Filters

13 Matching Hotels

Sort | **Reverse Sort**
Name

☐ Only Show Checked Hotels
(0 selected)

Hotel Name | By Letter
[] **GO**

Chain/Hotel Rep
<Any Chain or Rep>


Rooms
No Preference

Hotel Preferences
☐ Pays Commission
☐ In-Room Internet
☐ Pool
Show more

☒ Show only STAR hotels
★ STAR Rating
☐ Any ☐ 1 ☐ 2 ☒ 3 ☒ 4 ☒ 5
✓ Amenity Rating
☐ Any ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☒ 5

Displaying 13 of 13

Hotel de Crillon | **Add to My Selections**

 10, Place de la Concorde, Paris, France 75008
Phone: 1-4471-1500
Situating next door to the U.S. Embassy in the 8th arrondissement, this property inhabits Paris' Top 10 list when it comes to opulent traditional
[Read Full Review](#)

Commission: 10%
147 Rooms
\$760-\$10,559 (USD)

STAR Rating: ★★★★★
Amenity Rating: ✓✓✓✓✓
Agent Rating: ⭐⭐⭐⭐

[See on Map](#)

Add items to your report by clicking **"Add to My Selections."**

To remove an item from your report, click **Remove Item** or click the trashcan icon next to the item in **My Selections**.

As you add items to your report, they will appear in **My Selections** at the top right of your screen; we often refer to this as your "Shopping Cart."

You can expand or close this list by clicking the red arrow next to **My Selections**.

Displaying 9 of 9

Hotel de Crillon
Remove Item
Prestigious hotel, a former private residence originally built in the 18th century, located at the famous Place de la Concorde....[Read Full Review](#)

Four Seasons Hotel George V Paris
Add to My Selections
1928 landmark building 1 block from Champs-Elysees - Rooms feature architectural detail, crystal chandeliers and private terraces....[Read Full Review](#)

Show Nearby: See & Do Dining Airports

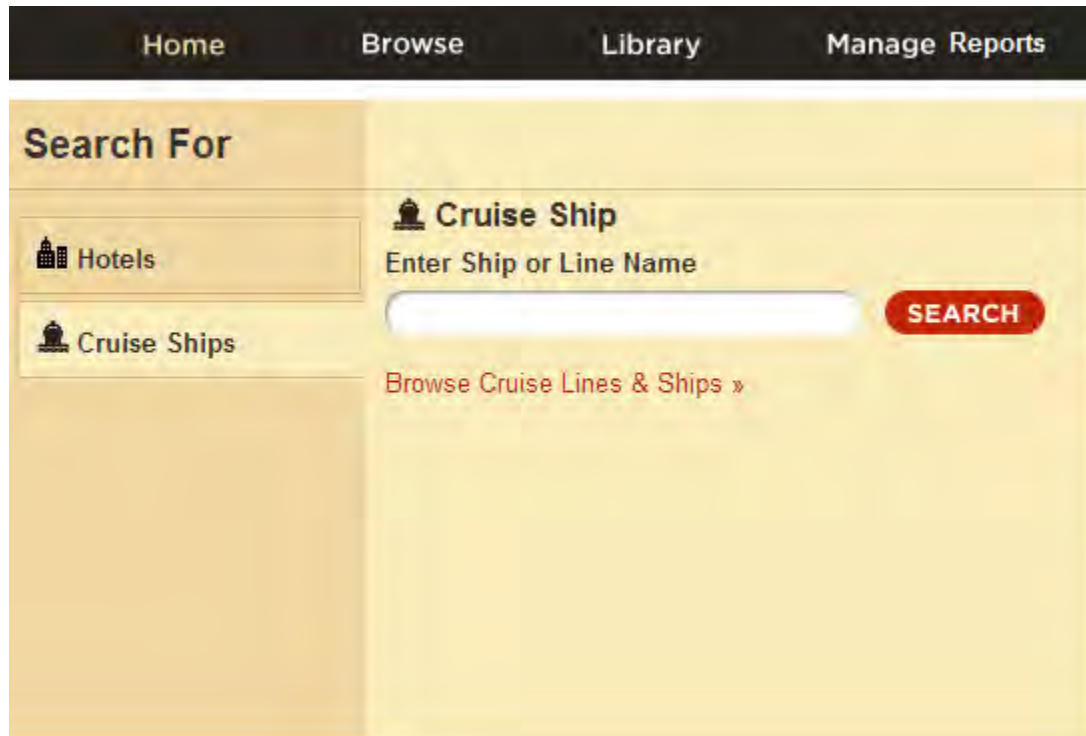
Update Items on Map?

My Selections (1) (0) (0)

- Hotels (1)
- Hotel de Crillon
- Cruise Ships (0)
- Paris (0)

How to Search for a Cruise Ship

Once logged in, you can search for **Cruise Ships** by clicking on the “Cruise Ships” link to the left of the map. If you aren’t on the Home Page, click the **Home** link in the menu bar at the top. You can also **Browse by Region** on the interactive map below the search box.



The screenshot shows a web interface with a dark navigation bar at the top containing links: Home, Browse, Library, and Manage Reports. Below this is a light yellow search area. On the left, under the heading 'Search For', there are two buttons: 'Hotels' and 'Cruise Ships'. The 'Cruise Ships' button is selected. To the right, under the heading 'Cruise Ship', there is a text input field labeled 'Enter Ship or Line Name' and a red 'SEARCH' button. Below the input field is a red link that says 'Browse Cruise Lines & Ships »'.

When you begin typing in the search box, it will auto-populate a drop-down list with possible Cruise Ships you’re interested in viewing. If you see the Cruise Ship in the list, mouse over the name and click to bring up the information.



This screenshot shows a dropdown menu that appears after typing 'royal caribbean' into the search box. The menu lists several cruise ships, each preceded by a small ship icon and followed by the text '- Royal Caribbean International'. The ships listed are: Freedom of the Seas, Liberty of the Seas, Allure of the Seas, Adventure of the Seas, Brilliance of the Seas, Enchantment of the Seas, Explorer of the Seas, Grandeur of the Seas, Independence of the Seas, Jewel of the Seas, Legend of the Seas, Majesty of the Seas, Mariner of the Seas, Monarch of the Seas, Navigator of the Seas, and Royal Caribbean International. At the bottom of the list, there is a link that says 'Can't find what you are looking for? Click here for more'.

You can also click the sentence in italics at the bottom of the populated search list for more choices.

How to Use the QUICK PRINT / SEND Options

If you only need to quickly print or email a Hotel or Cruise Ship to your client, use the 'Quick Print' or 'Quick Send' option instead of creating a trip.



Quick Print: Use this function when you want to quickly print an item from STAR, without having to save item to a trip.



Quick Send: Use this function when you want to quickly email an item from STAR, without having to save item to a trip.



Once you click the Quick Print icon, your item will open in a new internet tab/window. Notice there is no report cover with this function. To include a report cover, you must first save the item(s) to a trip.



Once you click the Quick Send icon, a pop-up box will be displayed. Enter the recipient's email address. If this is the first time you've entered this specific email address, then click the drop-down option which says: "Add email to list and clients."

Send to Client ✕ Close

Enter recipient's name or email address.

☒ Send me a copy

Enter a subject for your email message (optional)

Add a personal message (optional)

SEND TO CLIENTS PREVIEW > Cancel

How to Add an Item to My Selections

You can compile multiple Hotels or Cruise Ships into **My Selections** to send to your client. Once you have searched for the item of your choice, simply click on the red “Add to My Selections” link to the right of the item.

Home > Browse > France > St Tropez > Hotels

St Tropez, France

Overview Hotels Related

Filter St Tropez Hotels Zoom Hide Filters

12 Matching Hotels

Sort | **Reverse Sort**
STAR Rating

☐ Only Show Checked Hotels
(0 selected)

Hotel Name | By Letter **GO**

Chain/Hotel Rep
<Any Chain or Rep>

Rooms
No Preference

Hotel Preferences
☐ Pays Commission
☐ In-Room Internet
☐ Pool
[Show more ↓](#)


☒ Show only STAR hotels

★ STAR Rating [i](#)
☒ Any ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

✓ Amenity Rating [i](#)
☒ Any ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5

Displaying 12 of 12 LIST VIEW MAP VIEW COMPARE

☐ ★ **Byblos Saint Tropez** | **Add to My Selections**

 Avenue Paul Signac, St Tropez, France 83990
Phone: 4-9456-6800
In an obscure location on a hill at the edge of town, this celebrated bastion of privilege is St. Tropez's reigning glamour puss, a seasonal summer sa...[Read Full Review »](#)

Commission: 8%
91 Rooms
\$1,198-\$3,796 (USD)

STAR Rating: ★★★★★
Amenity Rating: ✓✓✓✓✓
Agent Rating: ★★★★★ [See on Map](#)

Once the item is added to **My Selections**, a black “Remove Item” bubble will appear next to the item. You can continue adding as many Hotels or Cruise Ships as you like in this way. If you need to search for a new location, simply go back to Home and browse for the new Item. Your items will remain in **My Selections** until you clear it out.

Home > Browse > France > St Tropez > Hotels

St Tropez, France

Overview Hotels Related

Filter St Tropez Hotels

12 Matching Hotels

Sort | **Reverse Sort**
STAR Rating

☐ Only Show Checked Hotels
(0 selected)

Hotel Name | By Letter **GO**

Chain/Hotel Rep
<Any Chain or Rep>

Rooms
No Preference

Hotel Preferences
☐ Pays Commission
☐ In-Room Internet
☐ Pool
[Show more ↓](#)

My Selections Clear 'My Selections'


Hotels (1)

Byblos Saint Tropez

Cruise Ships (0)

Displaying 12 of 12

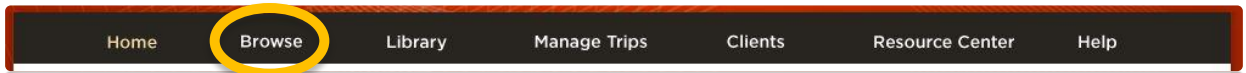
☐ ★ **Byblos Saint Tropez** | **Remove Item**

 Avenue Paul Signac, St Tropez, France 83990
Phone: 4-9456-6800
In an obscure location on a hill at the edge of town, this celebrated bastion of privilege is St. Tropez's reigning glamour puss, a seasonal summer sa...[Read Full Review »](#)

Commission: 8%
91 Rooms
\$1,198-\$3,796 (USD)

Using the My Selections Toolbar





To access the **My Selections** feature, click 'Browse' on the black menu bar.

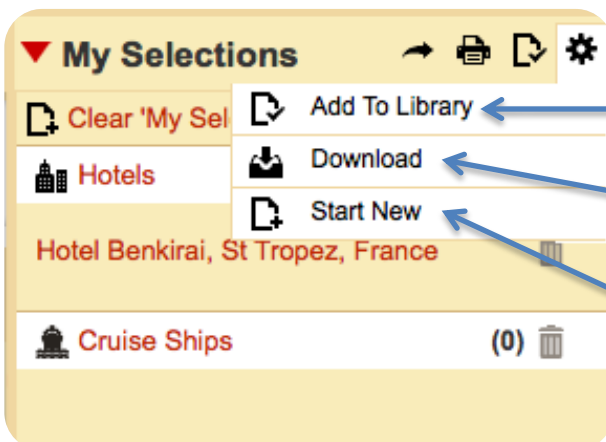


As you add Hotel or Cruise Ship information to **My Selections**, they are viewable by expanding the toolbar (click on the red arrow).



You can use the 4 icons in the toolbar to perform the following functions:

-  Email everything in **My Selections** to an email address.
-  Print out a copy of all of the items in **My Selections**.
-  Add the items to a Report for a client.
-  Add the items to your Library for future use, download selected items, or erase everything in your selections and start over.




Add the items in **My Selections** to your Library

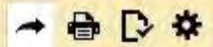
Download the items in **My Selections** to an Adobe PDF file

Clear **My Selections** box to begin a new report

Send to Client

To  'Send' a report to your client:

 **My Selections**



Send

Send to Client ✕ Close

Enter recipient's name or email address.

☐ Send me a copy

Enter a subject for your email message (optional)

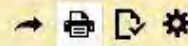
Add a personal message (optional)

- 1) Click the black arrow in your **My Selections** box.
- 2) Type your client's email address in the top box.
(If you haven't added your client's email before, be sure to click on "Add 'your client's email' to list and clients")
- 3) Check the box next to "Send me a copy" if you want to receive a copy of your client's email in your email box.
- 1) The subject line will auto-populate with the text you set up in Edit Profile or you can delete that text and enter a new subject line.
- 2) You also have the opportunity to add a personal message to the email.
- 3) Click if you want to review the report before sending.
- 4) Click when you're ready to email.

Print Items in My Selections

To  'Print' a report for your client:

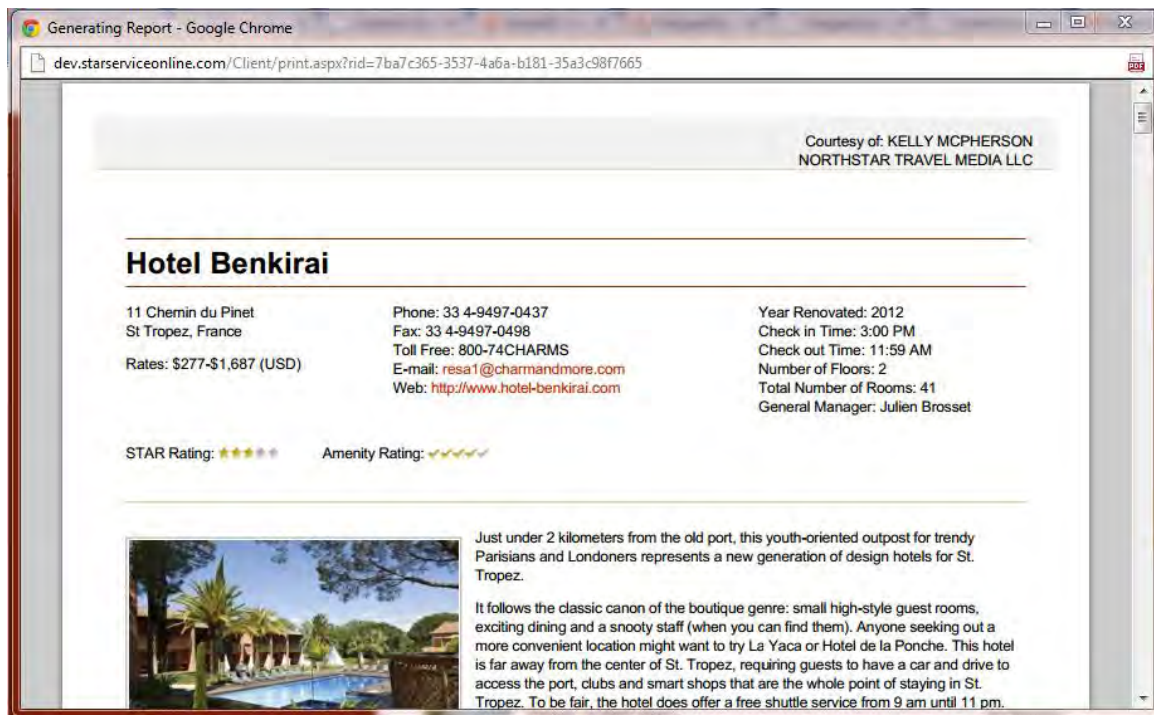
► **My Selections**



Print

- 1) Click the printer icon in your **My Selections** box.
- 2) This creates a PDF file that will allow you to print, save or email.

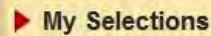
Note: It may take a few seconds for the PDF file to load; you should see “Generating Report . . .” at the top of the pop-up window.




Note: To print a cover page with your report, you must print from a Report, printing from My Selections or Quick Print options will not print your cover page/business card information.

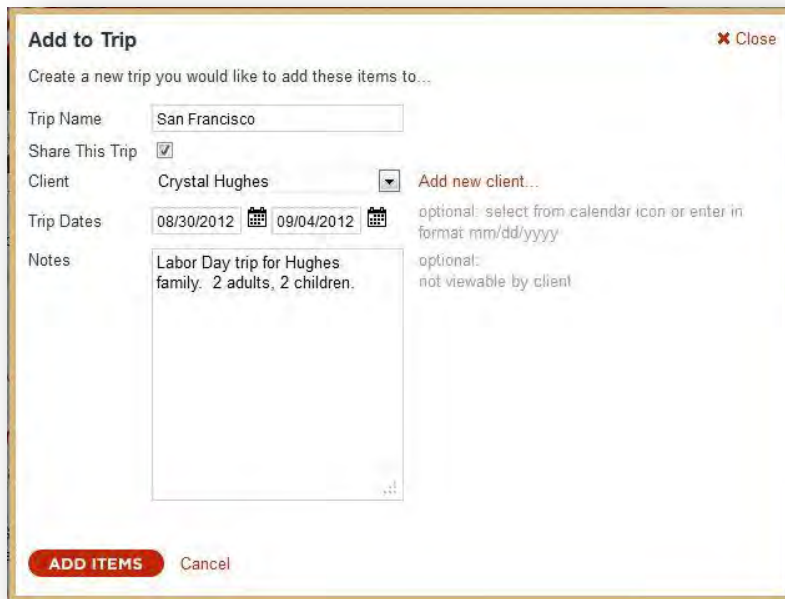
Add Items to a Trip in My Selections

To  "Add Items To a Report":

 **My Selections**

 **Add Items To a Trip**

Click the white paper with black check in your **My Selections** box; you will see the pop-up window below:



Add to Trip ✕ Close

Create a new trip you would like to add these items to...

Trip Name

Share This Trip ☒

Client Add new client...

Trip Dates optional: select from calendar icon or enter in format mm/dd/yyyy

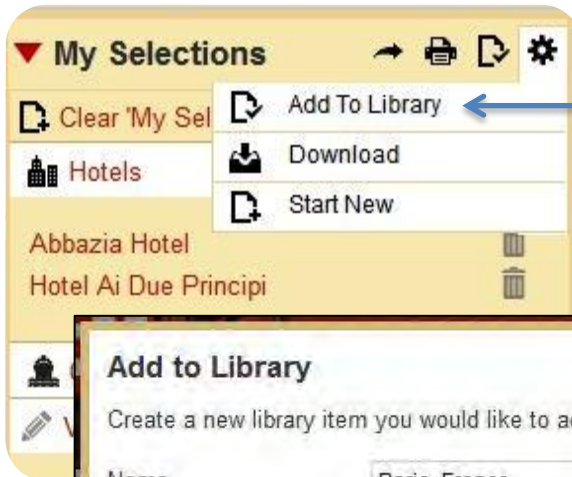
Notes optional: not viewable by client

ADD ITEMS Cancel

- 1) Enter your Report Name.
- 2) Check if you want to Share This Report with other members of your company on the same subscription.
- 3) Choose your client's name from the drop-down menu or click on **Add new client . . .** to enter the client's First Name, Last Name and email address.
- 4) Type in Trip Dates if applicable (optional).
- 5) Type any Notes you may want to include (optional).
- 6) Click **ADD ITEMS** button to complete this step.

Adding Items to the Library in My Selections

Note: You cannot print or send directly from a library item. You must first save it to a Report.

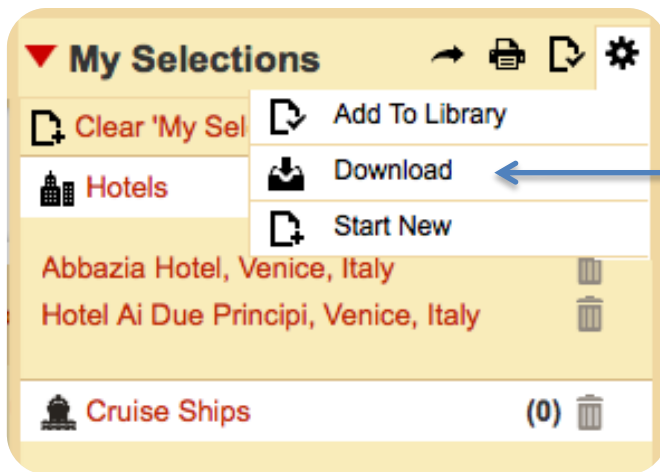


When adding the items in **My Selections** to your Library, you will see the pop-up screen below.

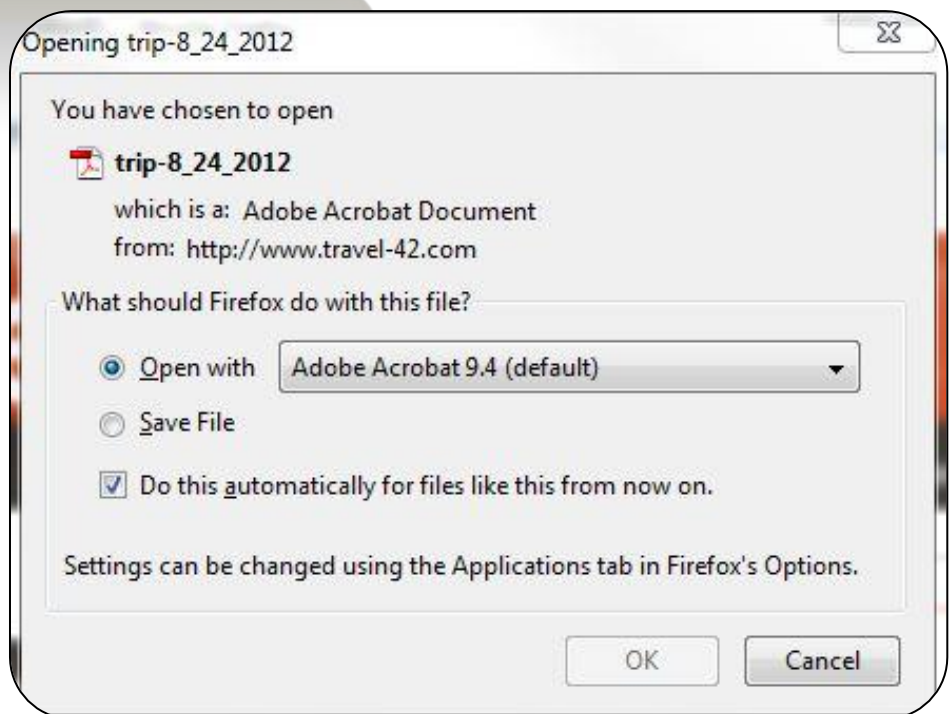
A screenshot of the 'Add to Library' pop-up form. The form has a title bar with 'Add to Library' and a 'Close' button. The main content area contains a text input field for 'Name' with the value 'Paris, France', a checkbox for 'Share This Library Item' which is checked, and a text area for 'Notes' containing the text 'Abrams family report for Paris, France trip - Winter 2013.', 'Food allergies *** Wheat', and 'Handicap accessible hotel and site-seeing only ***'. To the right of the notes area, there is a note: 'optional: not viewable by client'. At the bottom, there are two buttons: 'ADD ITEMS' (in a red box) and 'Cancel'.

Name your library item first. You have the option to “Share This Library Item” if you have a multi-user account; otherwise, disregard this feature. The Notes section is for your reference only; your client will not be able to view this information. When you’re done, make sure to click **ADD ITEMS** to successfully add the item to your Library.

Download Item(s) from My Selections



When downloading the items in **My Selections**, you will see the pop-up screen below:



If you haven't saved the items in the **My Selections** box to a trip or the library, it will automatically name the file "**trip-date of download**;" see example above. You will have two options, one to "Open with" in Adobe Acrobat, one to "Save File". Make your selection and then click OK.

Start New in My Selections



When starting a new report in **My Selections**, you will see the pop-up screen below:

Starting a new report will clear your current My Selections items and start a new list. Saved Trips and Libraries are not affected. This action cannot be undone. Are you sure you want to start a new report?

OK

Cancel

“Start New” clears all items in the box so you can begin a new report.

If you are sure you’ve saved all of the items in **My Selections** or don’t need them anymore, click OK. If you feel you have chosen this option in error, click Cancel.



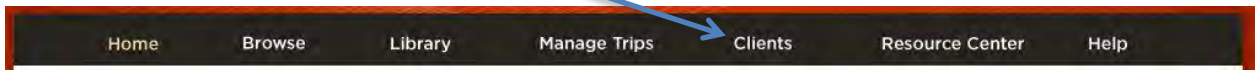
You can also click “**Clear My Selections**” to begin a new report.



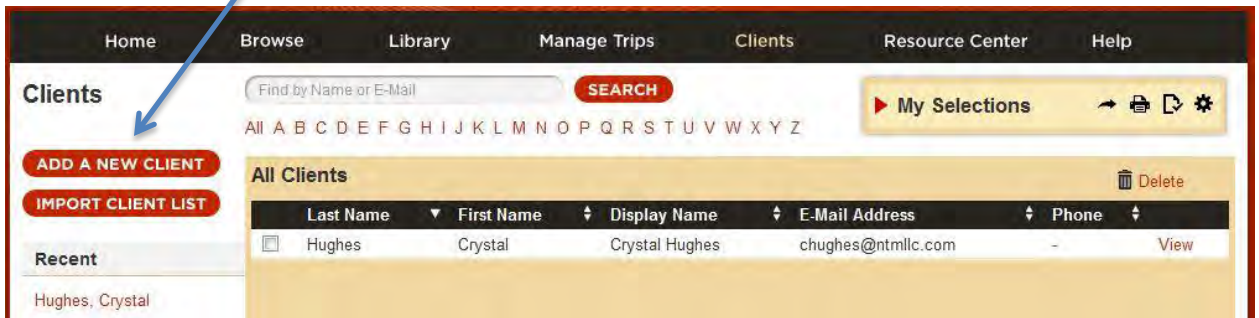
Once you have cleared **My Selections** the box should display (0) next to Hotels and Cruise Ships and no other items will be listed in the drop-down.

Adding a New Client

Click on "Clients" in the menu bar.



Click the "ADD A NEW CLIENT" button

A screenshot of the 'Create New Client' form. It has a title bar with a 'Close' button. Below the title bar are tabs for 'Basic Info', 'Contact', 'Special Needs', 'Family Info', and 'Miscellaneous'. The 'Basic Info' tab is active. It contains four text input fields: 'First Name *' with the value 'Your', 'Last Name *' with the value 'Client', 'Email Address *' with the value 'yourclient@mailbox.com', and 'Display As Name' with the value 'Your Client'. Below these fields is a red asterisk and the word 'Required'. At the bottom of the form are two buttons: 'SAVE CHANGES' and 'Cancel'. A blue arrow points from the text 'Make sure you click the' to the 'SAVE CHANGES' button.

You have to add a First Name, Last Name and Email Address. You also have the ability to add contact info, special needs, family specifics and miscellaneous information as well, but it is not required.

Make sure you click the **SAVE CHANGES** button.

Customizing Your Report



From **My Selections** click the 3rd icon, a piece of paper with a black check mark in the lower right corner. This will begin the steps to creating a report.

A form titled "Add to Trip" with a red "X Close" button in the top right. Below the title is the instruction "Create a new trip you would like to add these items to...". The form contains four sections: "Trip Name" with a text input field; "Client" with a dropdown menu showing "Please Select"; "Trip Dates" with two date pickers and a note "optional: select from calendar icon or enter in format mm/dd/yyyy"; and "Notes" with a large text area and a note "optional: not viewable by client". At the bottom are two buttons: "ADD ITEMS" and "Cancel".

You will see a pop-up window requesting specific information for your new report. If you haven't created your client information for the report, click "Create New Client" and type their name and email address to continue. When done, click

ADD ITEMS

A confirmation screen titled "Add to Trip". It says "Congratulations, your new Trip 'Appleseed Paris Trip' has been created and your items have been added to it!". Below this, it says "You may access your saved Trip at anytime by clicking *Manage Trips* from the menu and then clicking on **Appleseed Paris Trip**." A horizontal line separates this from the next section, which asks "What would you like to do next?". There are three options, each with an icon and text: a pencil icon for "Customize & Deliver this trip to my client", a document icon for "Return to this trip to add or change items", and a document with a checkmark icon for "I'm done with this trip. Start a new report". A blue arrow points from the text "Customize & Deliver this report to my client." in the following paragraph to the first option.

After you save the report, this screen will appear that will give additional options.

Click "**Customize & Deliver this report to my client.**"

Customizing Your Report

From this screen, you can manage/verify items before sending on to your client:

Paris, France: Report Plan




[Edit Cover Page Slideshow](#)

Client: **Hughes, Crystal** (chughes@ntmlc.com)
Report Dates: -
Private Notes: -
Created: 7/11/2013 3:33:30 PM (eastern)
Modified: 7/11/2013 3:41:42 PM (eastern)
Last Delivered to Client: -
Last Viewed by Client: -

Paris, France

 [Save Copy As](#)


 [Save to Library](#)

 [Send Report](#)


 [Download Report](#)

 [Print Report](#)

 [Preview Client Report](#)

 [Save to Word](#)

Report Contents

 [Agent Branded Report Cover](#)


[Edit](#) | [Remove](#)

 [Hotel de Crillon, Paris, France](#)


[Edit](#) | [Remove](#)

 [Hotel du Collectionneur Arc de Triomphe, Paris, France](#)

 [Comments](#) | [Edit](#) | [Remove](#)

 [Four Seasons Hotel George V Paris, Paris, France](#)

 [Comments](#) | [Edit](#) | [Remove](#)

 [Comments](#) | [Edit](#) | [Remove](#)

[Add Item To Report...](#) [From Browse](#) | [From Library](#)


CHANGE ORDER

- Edit the report details
- Save Copy As
- Save the report to your Library to reuse later
- Add additional items to the report by clicking . . .
[From Browse](#) or [From Library](#)
- Reorder listed items by clicking **CHANGE ORDER**
- Send Report (sends email to client)
- Download Report (pdf file)
- Print Report
- Preview Client Report
- Save to Word (exports an editable file to Word)

Saving a Trip to Your Library

Note: You cannot print or send directly from a Library item.

To add a trip to the Library:

Click  Save to Library

Paris, France: Report Plan




Client: Hughes Crystal (chughes@ntmlc.com)
Report Dates: -
Private Notes: -
Created: 7/11/2013 3:33:30 PM (eastern)
Modified: 7/11/2013 3:41:42 PM (eastern)
Last Delivered to Client: -

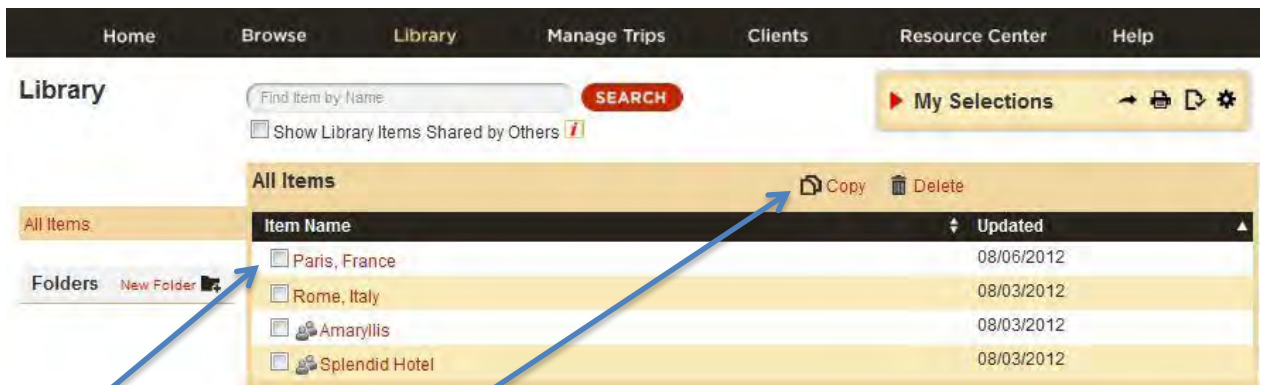
▶ Paris, France



 Save Copy As

 Save to Library

The Library is a great place to store your favorite reports and other specific items you've already customized to easily add to new reports in the future.



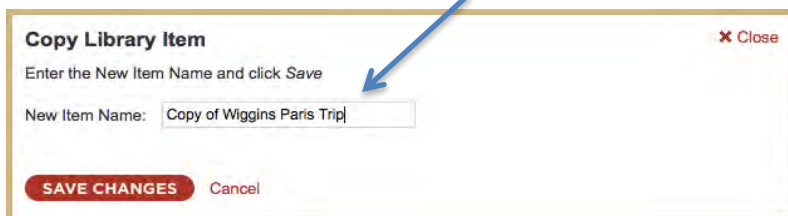
The screenshot shows the 'Library' section of the application. At the top, there's a navigation bar with 'Home', 'Browse', 'Library', 'Manage Trips', 'Clients', 'Resource Center', and 'Help'. Below the navigation bar, the 'Library' section is active. It features a search bar with the text 'Find item by Name' and a red 'SEARCH' button. To the right of the search bar is a 'My Selections' button with icons for navigation, print, share, and settings. Below the search bar, there's a checkbox labeled 'Show Library Items Shared by Others' with a red exclamation mark icon. The main content area is titled 'All Items' and contains a table with columns 'Item Name' and 'Updated'. The table lists four items: 'Paris, France' (updated 08/06/2012), 'Rome, Italy' (updated 08/03/2012), 'Amaryllis' (updated 08/03/2012), and 'Splendid Hotel' (updated 08/03/2012). Above the table, there are 'Copy' and 'Delete' buttons. To the left of the table, there's a 'Folders' section with a 'New Folder' button and a folder icon. A blue arrow points from the 'Copy' button in the table to the 'Copy' button in the 'Folders' section.

Item Name	Updated
Paris, France	08/06/2012
Rome, Italy	08/03/2012
Amaryllis	08/03/2012
Splendid Hotel	08/03/2012

Select a specific library item by checking the box to the left of it.

Click  Copy

Fill in the name of the new trip on the window that appears.



The screenshot shows a dialog box titled 'Copy Library Item' with a red 'X Close' button in the top right corner. Inside the dialog, there's a text input field labeled 'New Item Name:' with the text 'Copy of Wiggins Paris Trip' entered. Below the input field, there are two buttons: 'SAVE CHANGES' and 'Cancel'.

Copy Library Item ✕ Close

Enter the New Item Name and click Save

New Item Name:

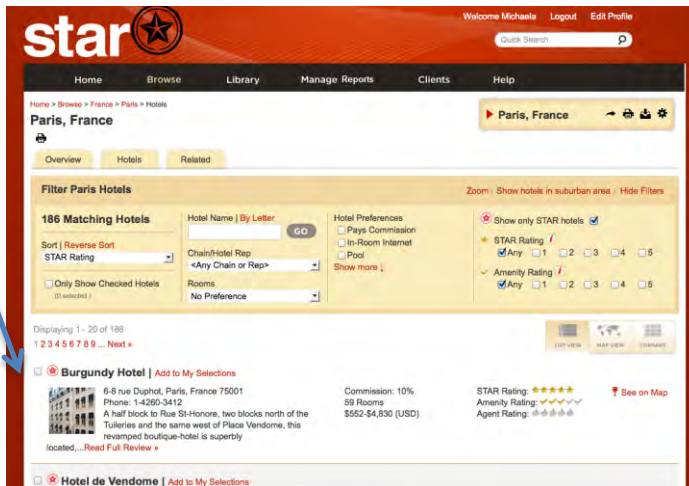
SAVE CHANGES Cancel

Click **SAVE CHANGES**

Note: After you copy a report and name it, you will be able to make changes to it prior to sending to your client.

How to Write an Agent Review

Choose specific hotel to review:



Depending on if there is an agent review or not, you will see one of the following:



OR



Click

CREATE YOUR OWN REVIEW

You should see this screen.

Fill out each section by clicking on the appropriate check boxes.

You may also add your personal comments regarding the property.

Create a Detailed Review ✕ Close

Your Overall Rating: I would recommend this hotel:

Click the thumbs to rate all that may apply. Scores are based on a 1 (poor) to 5 (excellent) rating system.

Incentives & Commissions: **Ease of Booking:**

Customer Value: **Customer Satisfaction:**

click learn more about each category

This hotel is good for: (check all that you feel apply)

<input type="checkbox"/> Accessible to Public Transportation	<input type="checkbox"/> Adventure	<input type="checkbox"/> Beach
<input type="checkbox"/> Business/ Conference	<input type="checkbox"/> Eco Experience	<input type="checkbox"/> Family with Kids
<input type="checkbox"/> Fishing	<input type="checkbox"/> Gay/Lesbian	<input type="checkbox"/> Golfing
<input type="checkbox"/> Honeymoon/Romance	<input type="checkbox"/> Relaxation	<input type="checkbox"/> Singles/Individuals
<input type="checkbox"/> Skiing	<input type="checkbox"/> Spa	<input type="checkbox"/> Student/Spring Break

Your comments about the hotel:
enter your comments

Submissions will appear in the Agent Reviews section for all agents to see. Submissions are reviewed for appropriateness and content and may not appear immediately. By clicking save, you are agreeing to the Terms of Use.

CANCEL **SAVE**

Click

SAVE