

CUSTOM SOLUTIONS/ NESTDIRECT PLATFORM INSTRUCTIONS



2025

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Custom Solutions/NESTDirect Mail Program

How it works:

- All TRAVELSAVERS US, NEST US, TRAVELSAVERS CA members are eligible to participate in the direct mail program. NESTPlus members are not eligible to participate. Please speak with your business analyst for details (ie: products, allotment levels, additional tiers, etc.)
- At first login each agent must agree to terms & conditions. Agents who do not agree to the terms and conditions will not be allowed to participate in our direct mail or consumer email programs.
- Each agent is responsible for the upkeep of their database.
- Agent may select which direct mail product to participate in.
- Our creative department has developed a portfolio of marketing pieces ranging from postcards to brochures that are available for your immediate use. We produce and distribute to the customers you select.
- JOURNEYS: is our official consumer lifestyle publication. It is a destination-based publication with rich content designed to inspire readers to plan their next experience and contact their TRAVELSAVERS/NEST travel professional. The publication's exclusive preferred supplier coupons offer additional travel values, amenities and services – which are only redeemable at your agency! Further creating opportunities for you to engage with your clients and move share to preferred suppliers.
- You'll respond to all of the resulting inquiries, complete the sale & watch your bottom line grow!

Custom Solutions/NESTDirect Email Program

How it will work:

- All TRAVELSAVERS US, NEST US, TRAVELSAVERS CA and NESTPlus members are eligible to participate in the Custom Solutions or NESTDirect Email program. Please speak with your business analyst for details (ie: products, allotment levels, additional tiers, etc.)
- At first login each agent must agree to terms & conditions. Agents who do not agree to the terms and conditions will not be allowed to participate in our direct mail or consumer email programs.
- You'll choose which offers to take advantage of, and we'll select which of your clients to target based on their past purchasing and marketing preferences and applicable client demographics.
- We'll create professionally designed direct mail and emails on your behalf and personalize them with your agency information as the call-to-action.
- Your client records will be updated with your promotional activity. For Email your client records will be tagged with who received, opened and/or clicked on the email promotion.
- You'll respond to all of the resulting inquiries, complete the sale & watch your bottom line grow!

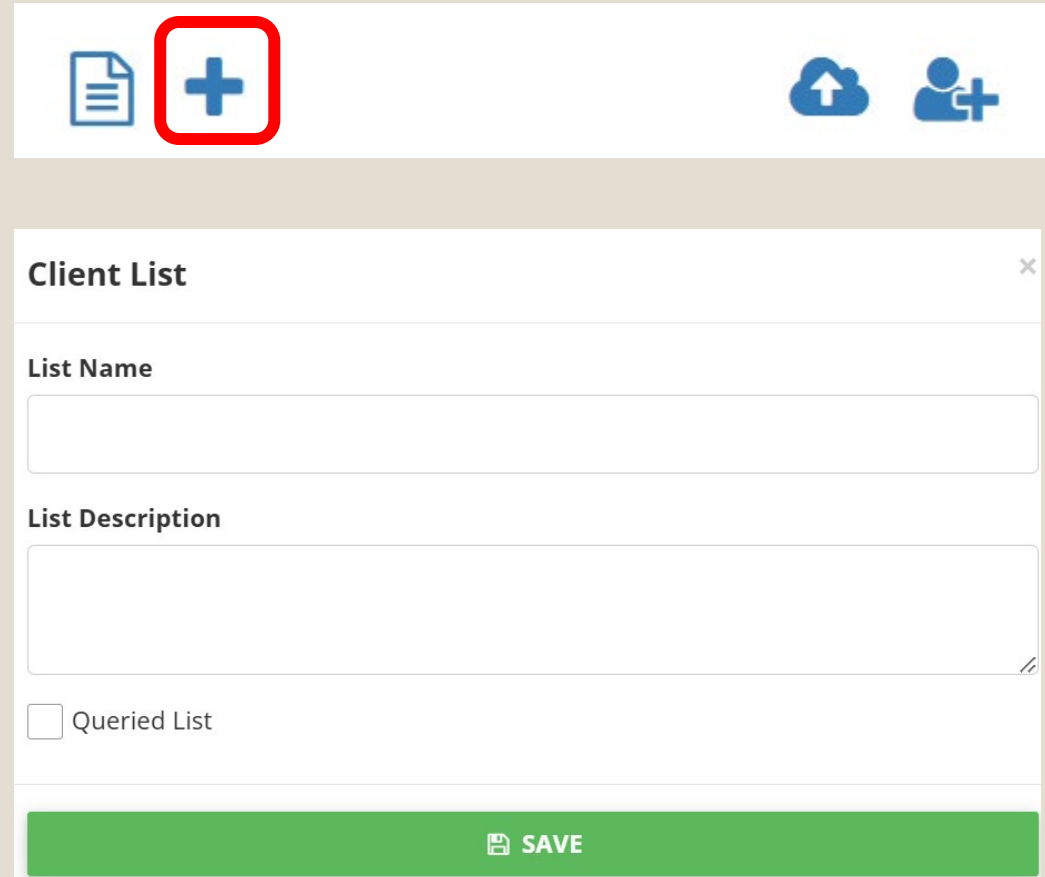
Client Database

- Clients
 - Add a new client list name
 - Add a client
 - Upload a database list
 - Edit/Update client
 - Add, Remove, Delete client(s) from List
 - Download a database list
 - Edit current list name
 - Delete a database list





Clients: Add List Name

Select download List icon

Client List box will open. Complete list name, and description field and select Save to save your new client list name.



The screenshot shows a software interface for adding a new client list. At the top, there is a horizontal toolbar with four icons: a document with lines, a plus sign inside a red square, a cloud with an upward arrow, and a person icon with a plus sign. Below the toolbar is a modal window titled "Client List" with a close button (X) in the top right corner. Inside the modal, there are two text input fields: "List Name" and "List Description". Below these fields is a checkbox labeled "Queried List". At the bottom of the modal is a green button with a floppy disk icon and the text "SAVE".




Client List

List Name

List Description

☐ Queried List

 SAVE

Clients: Add a Contact

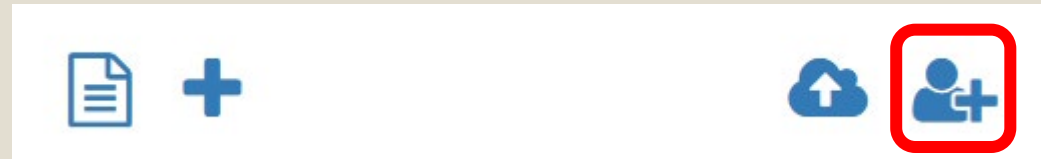
Select List name you want to add contact to. (will also save to Master list)

Select add contact icon



Client Information form will open – Enter contact details, select tags and add notes.

Click Save to save contact details.



Client Information ×

List: Master List

First Name	Last Name	Suffix
<input type="text"/>	<input type="text"/>	<input type="text"/>
Email	Phone	
<input type="text"/>	<input type="text"/>	
Address	Address 2	
<input type="text"/>	<input type="text"/>	
City	State/Province	
<input type="text"/>	<input type="text"/>	
Postal Code	Country	
<input type="text"/>	UNITED STATES ▼	

Tags

Select Value ▼


Notes

SAVE CLIENT

- Adventure
- Affluent Traveler Collection
- AffluentTraveler Magazine
- All Inclusive
- Baby Boomers
- Celebration
- Cruise
- Culinary
- Escorted Tours

Clients: Upload a List

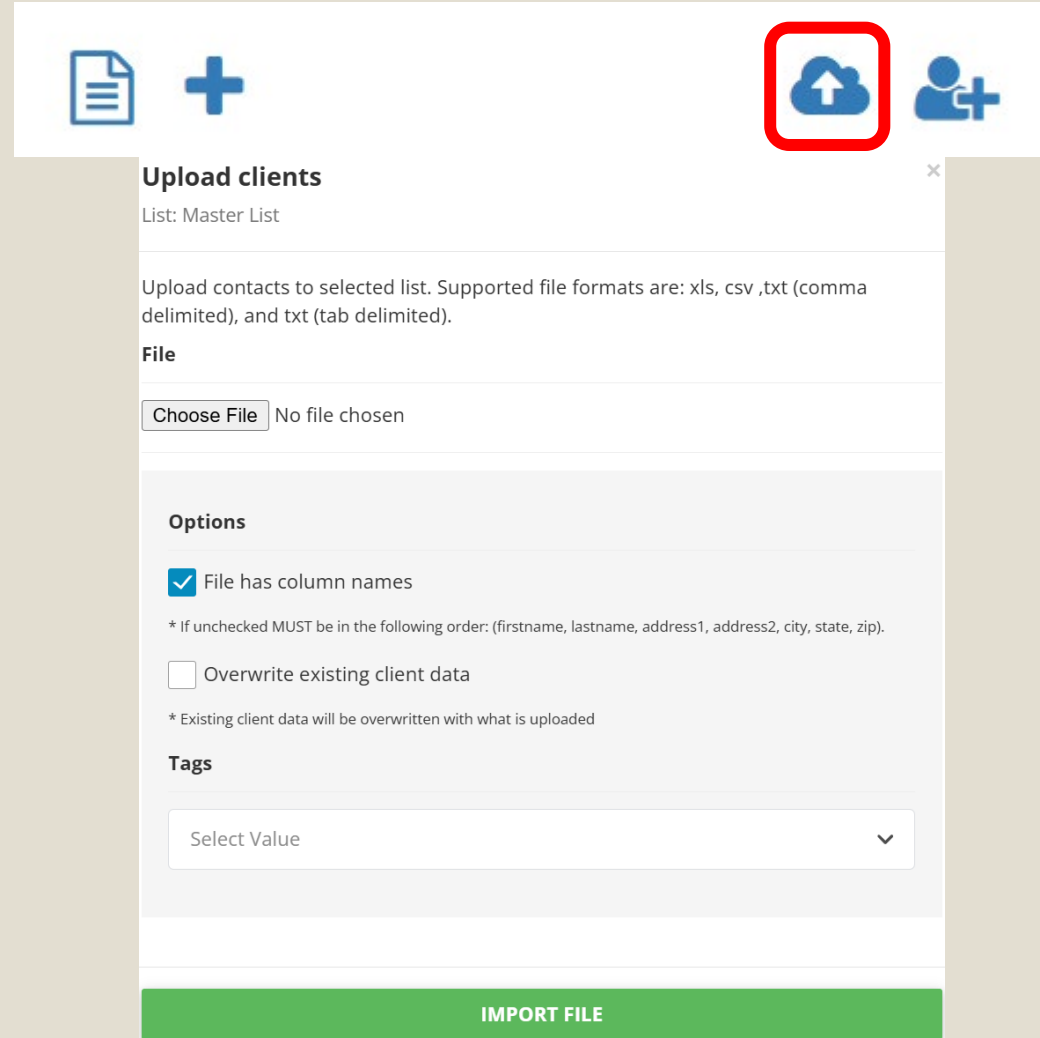
Create or select database list name you wish to upload your database to.

(Create New List: While on Master List select Add New List icon located just above it.  Create a new list name and save, then follow these instructions to upload a list)

Select Upload Clients To List icon 

Upload Clients form will open – choose file you wish to upload. (business analyst to provide excel header to use during onboarding)

Under Options leave file has names checked. Check Override existing client data to override current database with this new database or leave unchecked to add the clients to your existing database.



Upload clients

List: Master List

Upload contacts to selected list. Supported file formats are: xls, csv ,txt (comma delimited), and txt (tab delimited).

File

Choose File No file chosen

Options

☒ File has column names

* If unchecked MUST be in the following order: (firstname, lastname, address1, address2, city, state, zip).

☐ Override existing client data

* Existing client data will be overwritten with what is uploaded

Tags

Select Value

IMPORT FILE

Clients: Edit/Update Client Information

Double click on name of client who you wish to update

Client Information box will open

Edit/Update Client Information
(including tags and notes)

Click Save to save your changes

The screenshot displays a client management interface. At the top, there are columns for 'Last Name' and 'First Name'. Below these, a list of clients is shown. The client 'Harry Kansman' is highlighted with a red box. To the right, a 'Client Information' form is open, showing details for 'Harry Kansman'. The form includes fields for First Name, Last Name, Suffix, Email, Phone, Address, Address 2, City, State/Province, Postal Code, and Country. It also has sections for Tags (with 'Custom Solutions' and 'JOURNEYS' tags) and Notes. A green 'SAVE CLIENT' button is at the bottom of the form, also highlighted with a red box.

Last Name	First Name
Kansman	Harry
McGahan-L	
Mellebrand	
Bliss	
Wolfe	

Client Information

List: standard

First Name	Last Name	Suffix
Harry	Kansman	
Email	Phone	
Address	Address 2	
2100 Qualla		
City	State/Province	
WIXOM	MICHIGAN	
Postal Code	Country	
48393	UNITED STATES	

Tags

Custom Solutions | x JOURNEYS | x


Notes

SAVE CLIENT

Client(s): Add, Remove, Delete From List:

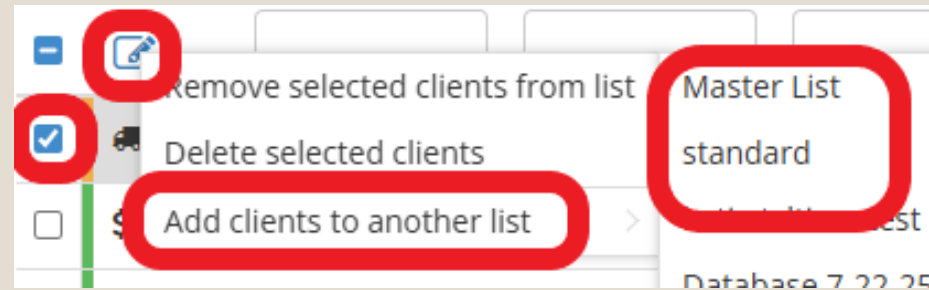
Add Client to Another List:

Select database list name that contains client you wish to add to another database.

Check the box in located to the left of the client you wish to add to another client list then click on the pencil  to open menu.

Select Add clients to another list.


Choose name of list you wish to add client to. Client will automatically be added to the list selected.



Client(s): Add, Remove, Delete From List:

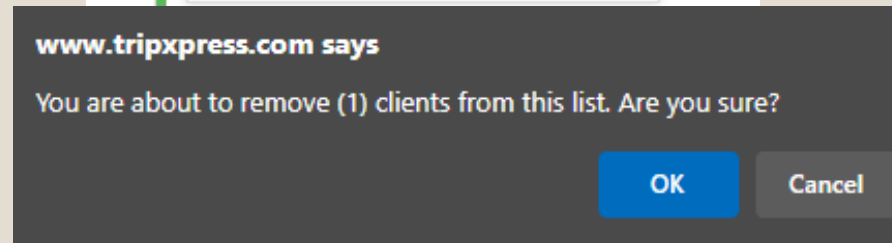
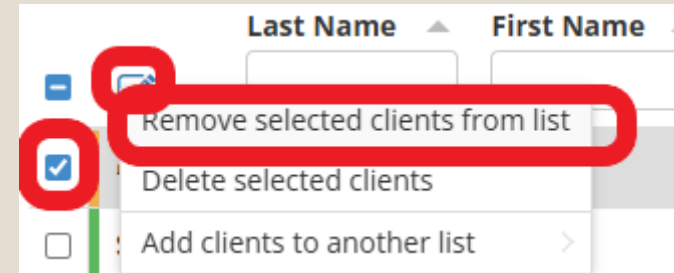
Remove Client From List:

Select database list name that contains client you wish to remove.

Check the box in located to the left of the client you wish to remove then click on the pencil  to open menu.

Select Remove selected clients from list.

Confirm you wish to remove client from list.
Client will automatically be removed from the list.




Client(s): Add, Remove, Delete From List:

Delete Client From List:

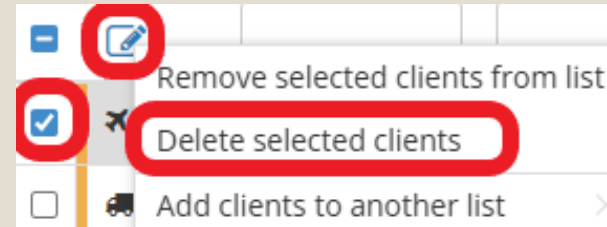
Note: Deleted clients will be permanently deleted. They will no longer exist in any list

Select database list name that contains client you wish to delete.

Check the box in located to the left of the client you wish to delete then click on the pencil  to open menu.

Select Delete selected clients.

Confirm you wish to remove client from list.
Client will automatically be removed from all lists.



www.tripxpress.com says

You are about to permanently delete (1) clients, and they will no longer exist in any lists. Are you sure?

OK

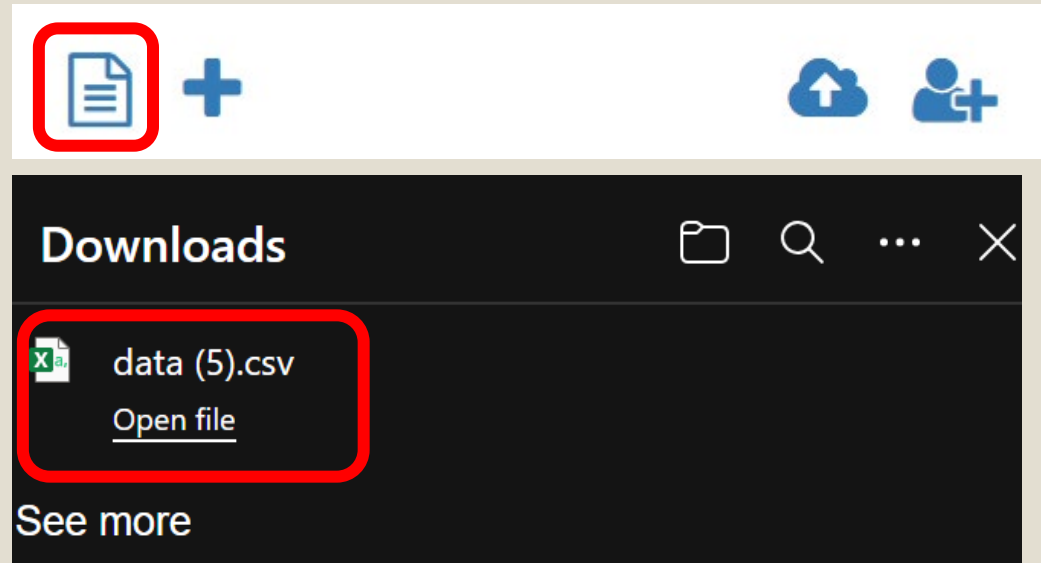
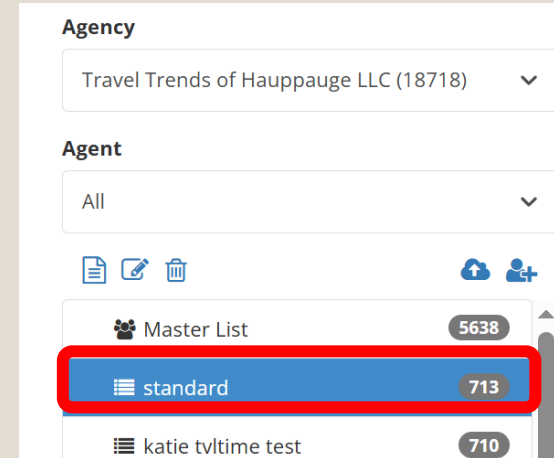
Cancel

Clients: Download list

Select name of database list you wish to download.

Select download List icon 

Download list will appear in the downloads list



Clients: Edit Current List

Select Client List name you wish to edit

Select Edit List icon



Client List box will open. Update list name &/or list description.






Click Save to save your changes.




Agency

Travel Trends of Hauppauge LLC (18718) ▼

Agent

All ▼

 Master List	5638
 standard	713
 katie tvlttime test	710



Client List ×


List Name

standard

List Description

Insert a description here.

☐ Assign to All

 **SAVE**

Clients: Delete list






Select name of database list you wish to Delete.




Select Delete List icon 




A pop up message will appear asking you to confirm you want to remove the selected list – Click OK to delete the selected list

Agency
Travel Trends of Hauppauge LLC (18718) ▼

Agent
All ▼

 Master List	5638
 standard	713
 katie tvlttime test	710

www.tripxpress.com says

Are you sure you want to remove standard?

OK Cancel

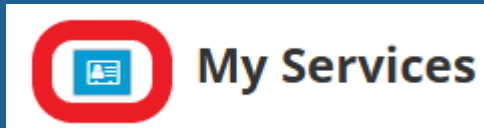
Marketing

- Dashboard
 - My Upcoming Promotions
 - Agency Profile
 - View Statistics
 - Email List Override
 - My Services
 - Email Supplier Opt Out
 - Direct Mail Auto Opt In (formerly Yearly Consent)
- My Promotions
 - View Existing Direct Mail Order
 - Cancel Existing Direct Mail Order
 - Promotion Preview
- Available Promotions
 - Promotions available for order
 - Order Promotion
- Opt-Out Preview Email Sample

Marketing: Agency Profile

This is the information that will be used for direct mail and email marketing for your agency.

Select the Agent Profile Icon to open the Agent Profile form.



Complete each section of the form then select Save Agent Profile.

Agency Profile

This is the information that will be used for direct mail and email marketing for your agency.

Agency Name

TRAVELSAVERS

Address

Call UsToday!

City

OYSTER BAY

Postal Code

11771

Email

customsolutions@travelsavers.com

Seller of Travel #

Salutation

1-800-876-4100

Address 2

71 Audrey Avenue, Suite 1

State/Province

NY

Country

UNITED STATES

Phone

516 624-0500

Website

www.travelsavers.com

Social Media

Facebook

https://facebook.com

TikTok

https://tiktok.com

Pinterest

https://pinterest.com

Instagram

https://instagram.com

X

https://twitter.com

Email Settings

Sender Name

Travelsavers Agent

Sender Domain (only if you have your own domain)

travelsavers.com

Reply-To Name


Reply Agent

Reply-To Domain (only if you have your own domain)







inthenest.com

SAVE AGENCY PFOFILE

Marketing: View Promotion Stats

Under my Upcoming Promotions select stats  icon to the right of promotion to view available stats (where available)


My Upcoming Promotions

	Title	Drop Date	Book St...	▲	Book St...	▲	Segments	
	 US Luxury by...	05/25/2025	06/01/2025		07/31/2025		Luxury	
	 ATC Suite Life	05/11/2025	05/16/2025		07/15/2025		Affluent Trav...	
	 ATC Suite Life	05/11/2025	05/16/2025		07/15/2025		Affluent Trav...	

Promotion Stats

First Name	▲	Last Name	▲	Email	▲	Sent	▲	Opened	▲	Clicked	▲	Unsubscribed
------------	---	-----------	---	-------	---	------	---	--------	---	---------	---	--------------







Marketing: Email List Override

Under my Upcoming Promotions select the Email List Override icon  located to right of any email promotion to override the system query for that promotion.

Choose the database list you wish to use from the Override List dropdown.


Select Save to confirm your selection.

My Upcoming Promotions

	Title	Drop Date	Book St...	Book St...	Segments	
	Goway	08/05/2025	08/05/2025	09/05/2025	Adventure,Es...	 
	Email List Override					 

Emails will be automatically sent to clients based on marketing criteria outlined for the promotion. If you would like to override the auto selection for this promotion, please choose the override list below.

Override List

Master List 

SAVE

Marketing: My Services

Email – you are auto opted into future email promotions. To be excluded from participation for a particular supplier:

Under my Services select the Edit button to the right of Custom Solutions Email to Exclude Suppliers. You will be excluded from sending out email promotions for each supplier selected. Simply select the supplier name(s) then save to update your selection.

Direct Mail – To auto opt into future direct mail promotions

Under my Services select the Edit button to the right of Custom Solutions (Basic, Silver, Gold or Platinum) to update your direct mail preferences to automatically opt into and order any future direct mail promotion.

My Services

Active

Service	Status	Type	
Affluent Traveler Collection Website	Included	Technolog	
cruiseexpress Consumer	Active	Technolog	Edit
Custom Solutions Email	Included	Marketing	Edit
Custom Solutions Platinum	Active	Marketing	Edit
OnlineXpress Basic	Included	Technolog	
Social Media	Included	Technolog	Edit
Travel Club	Included	Technolog	Edit
tripXpress	Included	Technolog	
tripXpress Air	Included	Technolog	

Custom Solutions Email Preferences

Excluded Suppliers

Select Value

SAVE

Custom Solutions Email Preferences

Excluded Suppliers

Select Value

Search

Abercrombie & Kent

Abercrombie & Kent DMC Corporation

ACCOR SA Sales & Distribution Division (Legacy)

Aer Lingus

AeroMexico

African Travel

Air New Zealand

Air Tahiti Nui

Custom Solutions Direct Mail Preferences

☒ Check here to automatically opt into and order any future direct mail

Default List

Master List

Default Filter

RANDOM

Default Orders

50

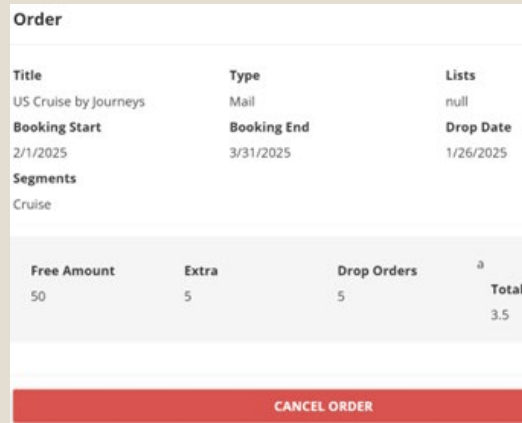
Default Drop




2

SAVE

View and/or Cancel Existing Order:
(Direct Mail)

Click on the Looking glass to preview promotion



	December Lu...	0	0	0	0	01/01/2025	02/01/2025	Cruise	
							<p>Receive Up to 40% OFF* Cruise Rates 50% Reduced Deposits and up to \$25 Onboard Credit* on sailings through April 2027</p> 		

Marketing: Available Promotions

Available Direct Mail Promotions can be viewed under Available Promotions

Order Promotion:

Click anywhere in promotion row to open promotion window

Click List dropdown to select the database list you wish to use for the promotion

Click Filter drop down to change filter from Random

Change Order (mailed to client) quantity

Change Drop (mailed to agency) quantity

Click on ORDER PROMOTION to place your order

	Title	Order Max	Free Amo...	Cost Per E...	Cost Per ...	Order Date	Drop Date	Division	Segments
	US Celebratio...	20000	50	\$0.35	\$0.35	04/10/2025	09/21/2025	Travelsavers US	Celebration
	US JOURNEY ...	10000	50	\$2.00	\$2.00	04/10/2025	01/08/2025	Travelsavers US	JOURNEYS
	US JOURNEYS ...	10000	50	\$2.00	\$1.50	04/10/2025	02/23/2025	Travelsavers US	JOURNEYS
	US JOURNEYS ...	10000	50	\$2.00	\$1.50	04/10/2025	08/24/2025	Travelsavers US	JOURNEYS
	US JOURNEYS ...	10000	50	\$2.00	\$1.50	04/10/2025	10/26/2025	Travelsavers US	
	ATC Vacations ...	15000	100	\$0.35	\$0.35	04/10/2025	03/09/2025	Affluent Travel...	Affluent Trave

US Celebrations by JO

Booking Window

10/1/2025 - 11/30/2025

Drop Date

9/21/2025

Order Max

20,000

Free Amount

50

Cost Per Extra

\$0.35

Cost Per Drop

\$0.35

Lists

Select Value

Search

standard

Filter

RANDOM

RANDOM

AUTO

CUSTOM

Lists

Select Value

▼

Filter

RANDOM

▼

Orders

50

Drop

0

Total: \$0.00

ORDER PROMOTION

Opt-Out Preview Email

Preview Email:

Preview emails are sent to the agent 24-48 hours prior to a consumer email being sent out to your clients.

Opt-Out: To exclude the email from being sent to your clients simply click on the yellow banner located at the top of the preview email.

[Click here to opt-out for Goway April 1, 2025 Consumer Email](#)

Is this email a mess? [View the online version](#)

[Click here to opt-out for Goway April 1, 2025 Consumer Email](#)

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goway 5 YEARS



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Save US \$483

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Please contact your business analyst with any questions or email Yolanda Speringo at:

CustomSolutions@travelsavers.com

NESTDirect@inthenest.com